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PLANCRAFT USER GUIDE

Coaching

Understand coach matching, privacy choices, scheduling, Accountability, and how to work effectively with your PlanCraft coach.

Starting coaching

1. Complete the Momentum assessment and coaching enrollment flow.
2. Choose whether to share relevant PlanCraft information with your coach. Private is the safe default until you explicitly choose sharing.
3. Complete subscription checkout and wait for membership activation and coach matching.
4. Use the scheduling link connected to your currently assigned coach.
5. Open your Momentum Dashboard and plan-specific Accountability workspace to prepare and follow through.

How coach matching works

PlanCraft considers a valid referring coach first, then your requested gender preference, the configured Default Coach, and finally the least-loaded eligible coach. If no eligible match is immediately available, your status may show that matching is in progress.

Your privacy choices

Sharing is explicit Purchasing coaching does not automatically require you to share all PlanCraft information with a coach.	**You can keep information private** Coach sharing is a separate setting and private is the safe default.
You can revoke access Turning off coach sharing in Momentum preferences removes coach access at the data layer.	**Private coach notes stay private** Internal preparation, concerns, and follow-up notes are not shown in the student-facing workspace.
Shared notes are intentional Only coach notes explicitly marked for student sharing appear in Coach's Mirror.	**Plan context matters** Accountability records and coach access are scoped to the correct student and plan.

Use Accountability between sessions

- Keep your North Star visible so weekly decisions serve the larger goal.
- Use Stop Doing items to protect time, energy, and focus.
- Make Weekly Commitments concrete enough to complete and review.
- Record decisions that should not be reopened without new evidence.
- Review shared Coach's Mirror feedback before your next conversation.

Scheduling note

External calendar	Scheduling opens the assigned coach's external scheduling link. The booking does not currently flow back into PlanCraft automatically, so keep the confirmation from the scheduling service and contact the coach if it does not arrive.