
How it works

One private place for each client. Todd's weekly coaching loop, prepared for him and waiting on his phone. A team that prepares the work, and Todd who approves anything a client will see.

A day, a week, a month and a season, for Todd, his clients and his team. What's here now, and what comes next.

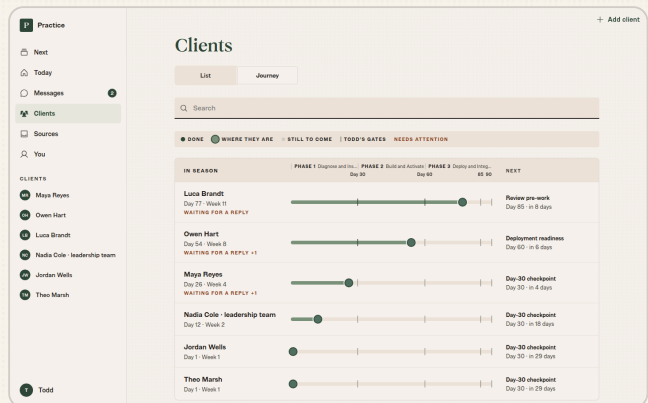
WHAT IT IS

One system, for three kinds of people

Clients get one private place for their plan, their session notes and a thread with Todd. Todd gets his weekly loop prepared for him. The team prepares that work, and Todd approves anything that reaches a client in his voice.

FOR CLIENTS

A private app on their phone and at their desk. It carries a neutral name on the outside and Todd's brand inside. Their plan is their home, with the week of their season on it. Before each session they answer a few questions. After it they get a summary, their commitments and a follow-up. And they have one thread with Todd.



Every client at a glance: where each one is in their season, and what's coming.

FOR TODD

A morning view of the day, and **Next**: one short stack of what needs him, each item ready to approve, change or put off. Agendas are prepared before sessions and debrief packages after them. He approves from his phone.

NEW CLIENTS FIRST

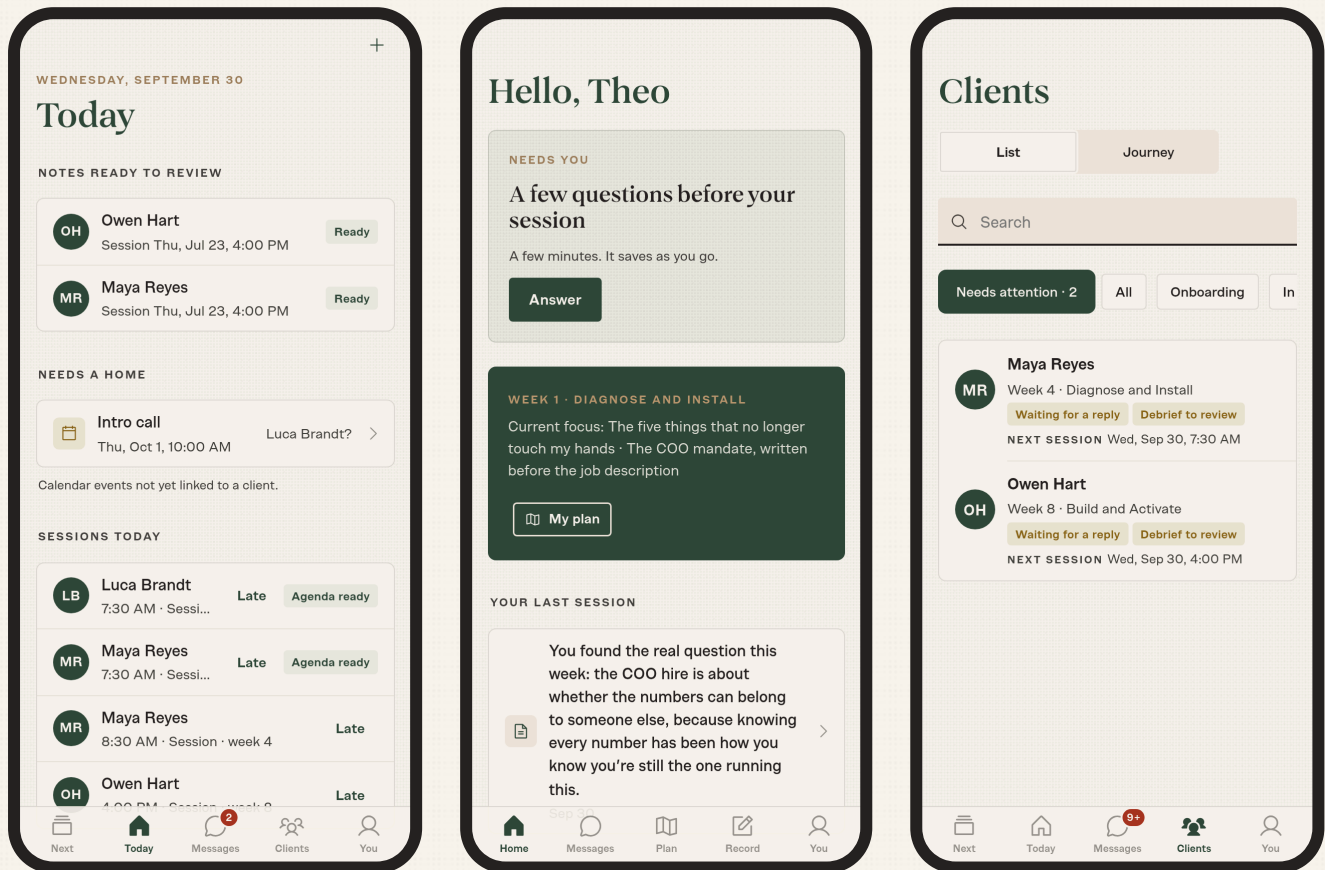
A client who starts now lives here from day one. Existing clients stay where they are until the team brings them in, one at a time.

FOR THE TEAM

They see the clients they are allowed to see, and nothing else. They prepare debrief packages, write to clients as themselves, and hand anything that needs Todd straight to him.

The same record, seen three ways

Each person sees what is theirs to see. The client sees only what is shared with them. The team never sees what Todd keeps to himself.



Todd

Today: notes ready to review, anything that needs a home, the sessions of the day, and every client in season. Next, Messages and Clients are a tap away.

A client

Their week and phase, the current focus, their last session in one line, their plan, their record and their thread with Todd.

The team

The clients they can read, their threads, and the drafts they prepare. What they send goes out under their own name.

Four things the system never bends on

TODD APPROVES

Nothing reaches a client in Todd's voice until he has approved it.

Drafts are prepared for him and wait for him. Automatic reminders are plain notices from the system, never written as if Todd wrote them. Claude Code can only add drafts and notes. It can never send anything to a client.

THREE LAYERS

Shared, Todd-side and Todd-only.

Every item sits in one of three layers. Clients only ever see what is shared. The team sees the shared layer and the Todd-side layer. Todd's private notes are his alone.

DISCRETION

No name outside the app.

No client name appears in a web address, a notification, an email subject or a calendar entry. A lock screen says "New message". A client Todd keeps to himself cannot be found by his team through a list, a search, a link or a count.

NO GUESSING

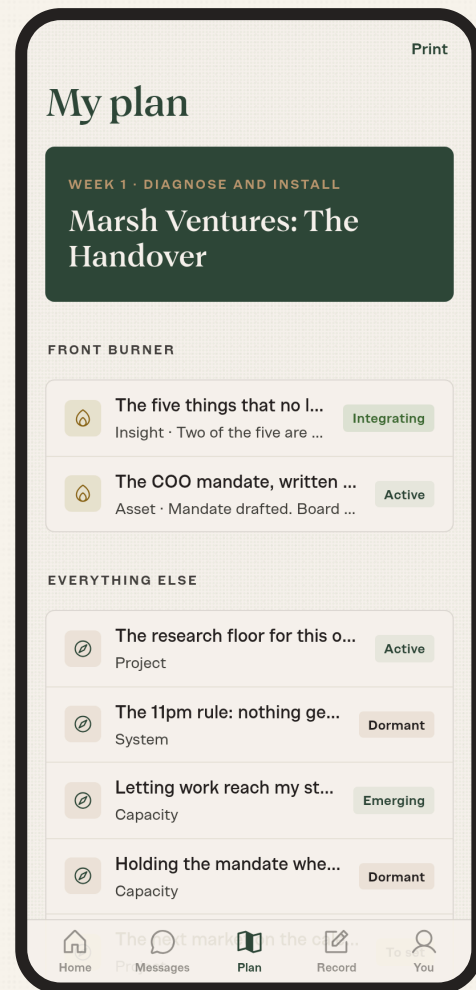
Nothing is written to a record on a guess.

When the system isn't sure whose a transcript is, it waits in **Needs a home** for Todd to decide. A meeting with two clients is never guessed at: Todd gives it one owner, or splits it line by line.

Everything written to a record says where it came from and when, and every record keeps its earlier versions. Anything written by mistake can be taken back out.

From signature to kickoff

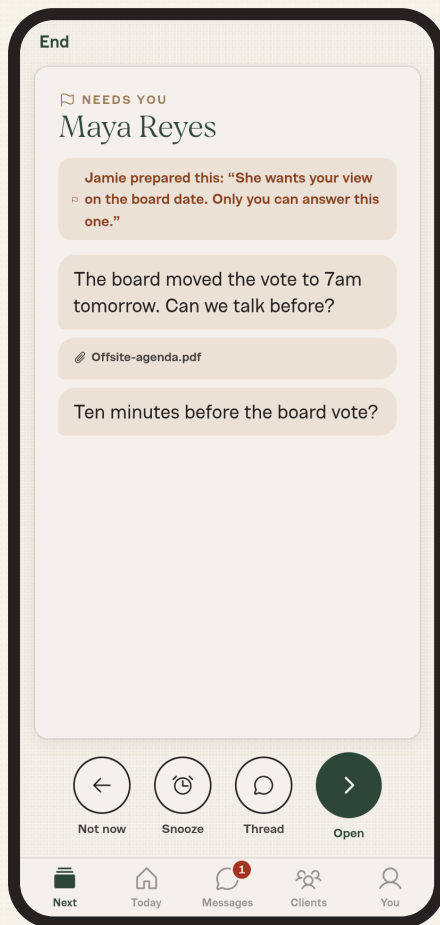
- 1 **Added.** Todd adds the client: team-visible, named team members only, or Todd-only. He picks the intake instructions and sets the kickoff date. The client gets a sign-in email that doesn't name Todd.
- 2 **Intake.** The client answers Todd's intake, pasting or uploading their answers, and sets their 1 to 10 baseline.
- 3 **Four instruments.** The four assessment reports are uploaded, and each is read into the record.
- 4 **Right-fit call.** Marked as held.
- 5 **Gap interview.** Todd fills the gaps the answers left.
- 6 **Profile synthesis.** Drafted from everything the client gave. Todd edits it and approves it.
- 7 **The plan.** Drafted as tracks or a pathway, then set with the client at kickoff. That version is kept as day 1.
- 8 **Kickoff.** Todd confirms it once everything is in. The season clock starts.



After kickoff, the plan is the client's home.

Each client's place on this path shows on their record and on the clients board, so Todd and the team can see at a glance who is waiting on what.

Five minutes, then back to his day



A card in Next: Jamie handed Maya's question to Todd, with a note.

Morning: Today

The day on one screen: notes ready for review, anything waiting for a home, the sessions of the day with their agendas, and every client in season with their week.

Next

One short stack of what needs him, sized to the time he has: replies, debrief packages, call requests, questions, reflection questions, anything the team handed up. On the phone:

- **Right** does what the card proposes.
- **Left** is “not now”.
- **Up** snoozes it to a time.
- **Tap** opens it. **Hold** answers by voice.

Anything that reaches a client shows its exact words on the card and waits a few seconds with Undo. A debrief package always opens full screen.

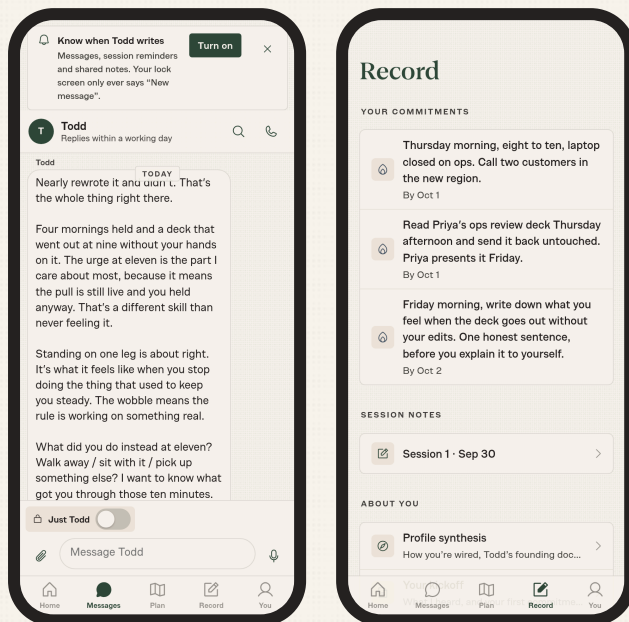
Messages

Every thread in one list, unread first, with who is waiting for a reply. One search across everything he can see.

Quiet when he wants it

Quiet hours keep his phone still. Where a client's settings allow it, a client can mark one message Urgent, and it reaches him once, without a name.

Small, private, and on their phone



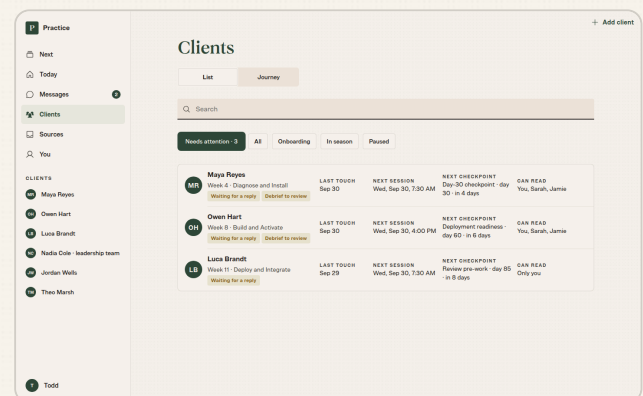
A client

- Home shows their week, their focus and what's next.
- One thread with Todd: messages, voice notes, photos and files. The top of the thread says when to expect a reply.
- On a team-visible client, one message can be marked **Just Todd**. Only Todd sees it, and his reply to it stays just between them.
- Commitments with their dates, marked done from the phone.
- A call can be requested from the thread.

A team member

Jamie's day, say:

- Opens the clients they can read. Clients Todd keeps to himself simply aren't there.
- Prepares the debrief package after a session, ready for Todd.
- Answers in the threads under their own name, and hands anything that needs Todd to him with a short note. It lands at the top of his Next.
- Suggests a change to one of Todd's skills. It waits for Todd.
- Works in Claude Code with a client's record, and saves decks, worksheets and routines back as drafts for Todd.



The clients list: last touch, next session, next checkpoint, and who can read each one.

A WEEK

Todd's coaching loop, run for him

Every session runs the same loop. The drafts are prepared from the client's own record, in Todd's voice, and wait for him.

THE DAY BEFORE

Reflection questions. Drafted for Todd to approve, then sent. The client answers by typing or by voice, and the voice recording is kept, because energy and mood matter.

TWO HOURS BEFORE

The agenda. The framework for this session and why, the zones of the conversation with times, the Leverage Points so far, the Watch Items, the open commitments and the client's reflection answers.

THE SESSION

On Zoom or in person, as now. The calendar entry carries no name.

STRAIGHT AFTER

The transcript arrives from Granola, or is uploaded, and is matched to the client. **The debrief package** is drafted: a strategic debrief for Todd, a post-call summary for the client, a follow-up, and updates to the record. The team can prepare it; Todd approves it.

ONCE APPROVED

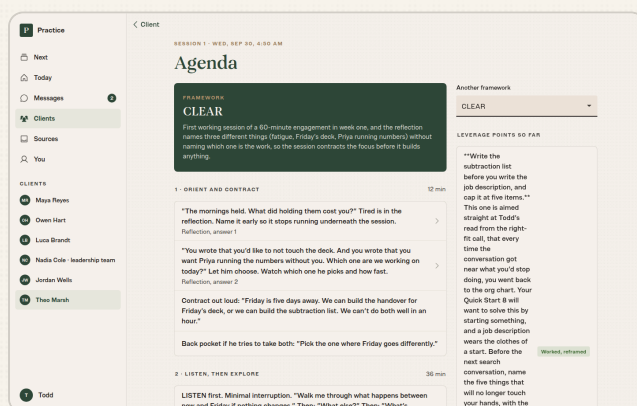
The summary reaches the client: the Key Insight, their commitments with dates, the Next Call Focus and Todd's Note.

TWO DAYS LATER

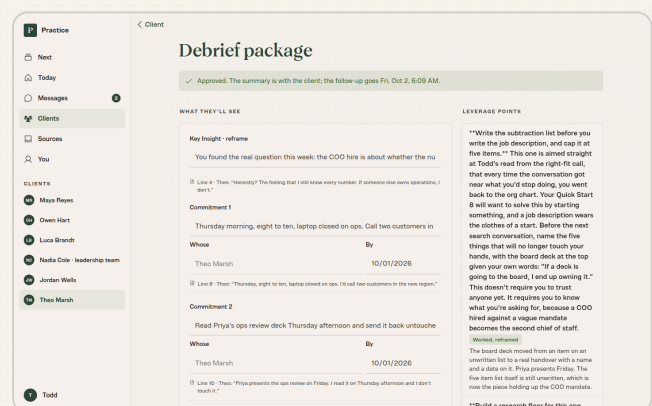
The follow-up goes out, as Todd approved it.

THROUGH THE WEEK

Commitments are worked on and marked done. Messages come and go in the thread, with reply suggestions drafted for Todd when he wants them.

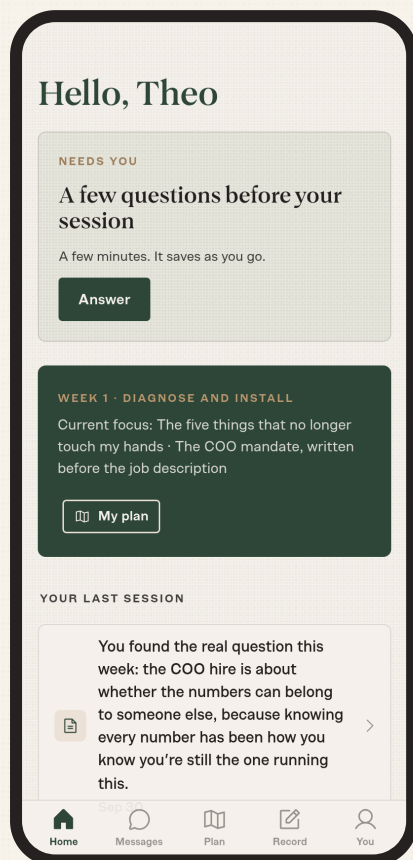


The agenda, two hours before.

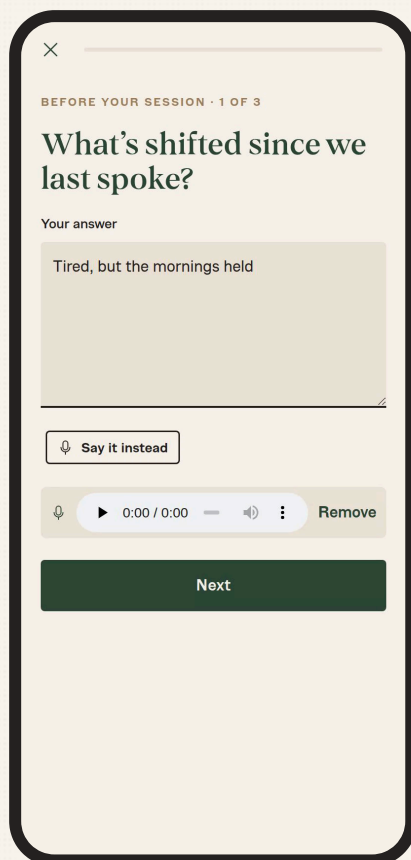


The debrief package, approved.

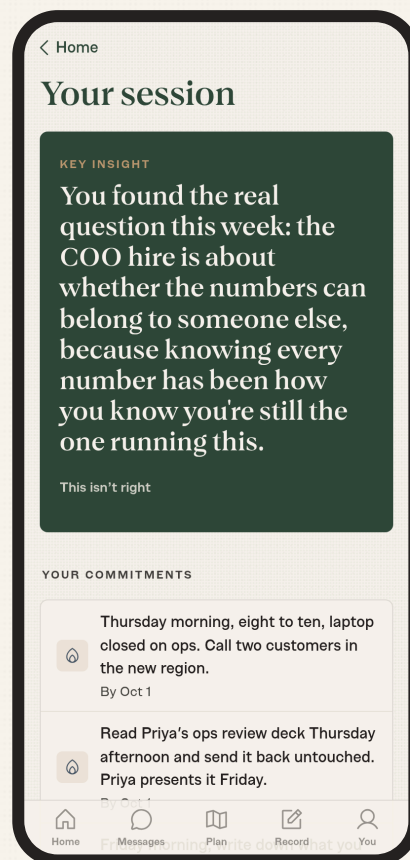
What Theo sees



The day before: a few questions, waiting on his home screen.



He answers by voice. The words come back to check, and the recording is kept for Todd.



After the session: the Key Insight and his commitments.

Everything the client reads has been approved by Todd. Drafts are checked against Todd's voice before he sees them: the words he never says, the length of a message between sessions, and no tells of a machine.

The plan, gone through together

The monthly update

Once a month the plan says an update is due. Todd and the client take each track or milestone in turn: where it stands now, and one line on it. The new note replaces last month's, and the earlier ones stay in the plan's history. The day-1 plan is always kept.

Shifts

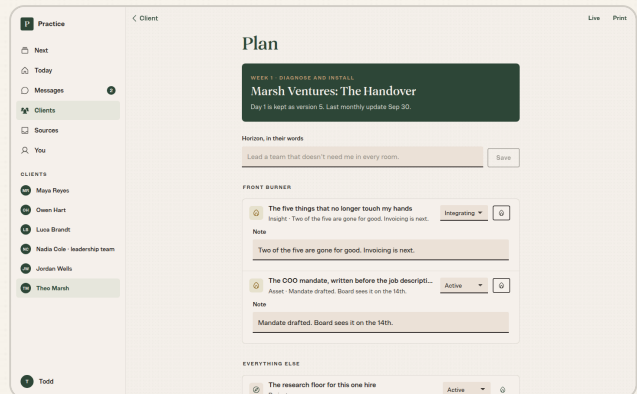
Between updates, a shift is logged in a line, dated that day: "The COO hire moved to the front burner." The client sees these on their plan.

Commitments

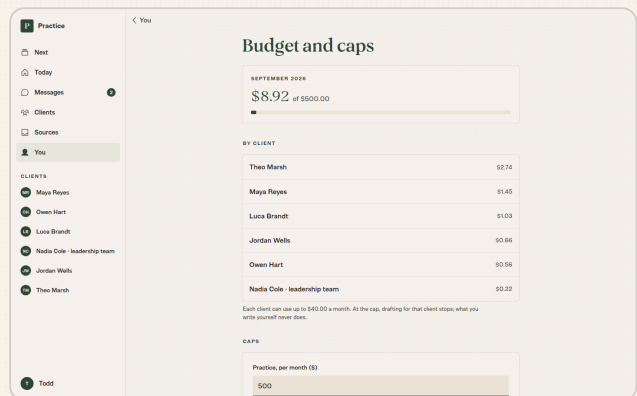
Open commitments carry through the agendas until they are done, so nothing is dropped between sessions.

Budget and caps

The drafting work has a monthly budget, for the practice and for each client. At a client's cap, drafting pauses for that client. What Todd writes himself never stops.



Theo's plan after the monthly update.



Budget and caps.

Ninety days, in three phases

From kickoff, every client runs on the season clock. The app knows the day, the week and the phase, and shows the next gate.



Now

- Each client's day, week and phase, on their home screen and on Todd's.
- The clients board: every client on one line through the season, with the next gate and how many days away it is.
- The plan's monthly update, with the day-1 plan kept.

Coming, in the whole-season phase

- The day-30 and day-60 checkpoints arriving with their checks already done.
- Day-85 pre-work, the review agenda, and day 1 laid beside day 90.
- Moments of Impact: an activation prompt 24 to 48 hours before a real event, and a moment card on the day.
- Renew, restructure or close.

Practice

- Next
- Today
- Messages
- Clients**
- Sources
- You

CLIENTS

- MR Maya Reyes
- OH Owen Hart
- LB Luca Brandt
- NC Nadia Cole · leadership team
- JW Jordan Wells
- TM Theo Marsh**

Todd

< Clients

WEEK 1 · DIAGNOSE AND INSTALL

Theo Marsh

Overview | Timeline | Record | Private | Ask

Day 1 of 90 · Diagnose and Install | Day-30 checkpoint · day 30 · in 29 days

PHASE 1 Diagnose and Install | **PHASE 2** Build and Activate | **PHASE 3** Deploy and Integrate

SESSIONS + Book

Nothing booked

RECENT SESSIONS

Wed, Sep 30, 4:50 AM
Session 1 · debrief package

THIS SEASON

Profile synthesis | Shared

Plan | Tracks

Onboarding summary | Not started

LATELY

Nearly rewrote it and didn't. That's the whole thing right there. Four mornings held and a deck that went out at nine without your hands on it. The urge at ele...
Message · Todd · Sep 30

Only for you: I nearly rewrote it at eleven.
Message · Client · Sep 30

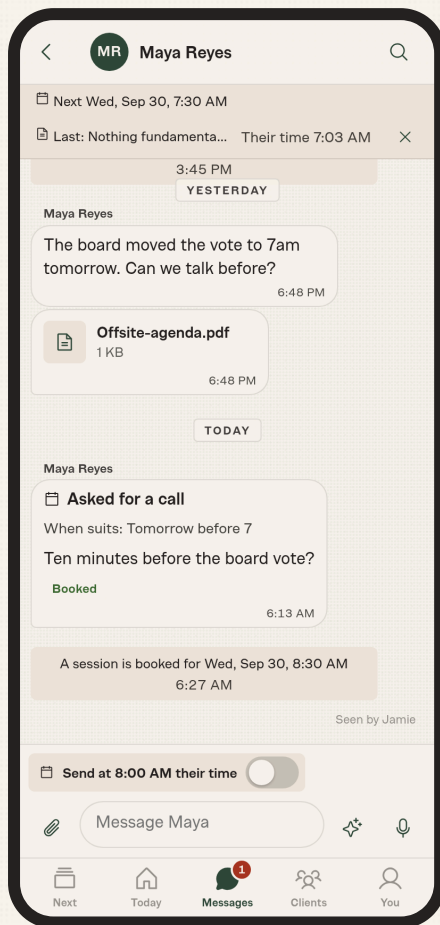
Attachment
Attachment · Client · Sep 30

Ops-review-draft.pdf
Document · Client · Sep 30

Tired, but the mornings held, I did not open the laptop before nine on four days.
Voice note · Client · Sep 30

A client's record, with their place in the season across the top.

Close, with edges



Maya's thread, on Todd's phone: a file, and a call she asked for, now booked.

One thread

Each client has one thread with Todd and the team who can read their record. Messages, voice notes, photos and files. Voice notes are transcribed.

When to expect a reply

The top of the thread says it plainly, set per client: "Replies within a working day".

Asking for a call

A client can ask for a call from the thread. It arrives in Todd's Next, and booking it turns the request into a session.

Just Todd

On a team-visible client, a single message can be marked Just Todd. The team never sees it.

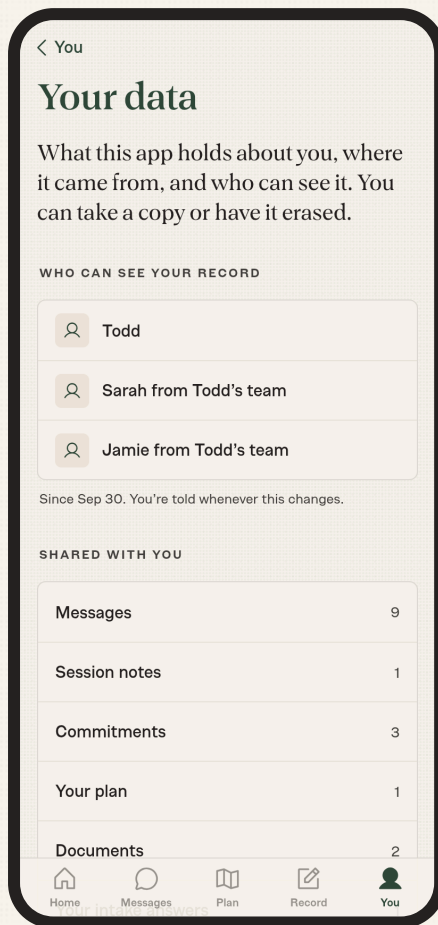
Quiet hours and Urgent

Todd's phone stays quiet in his quiet hours, and everything waits in Messages and Next. Where Todd allows it for a client, they can mark one message Urgent, and it reaches him once, without a name.

Away

Todd sets an away line and a date ("Away until Monday. The team has you covered."), and it shows under his name in every client's thread until then.

Quiet by default



Your data, on the client's phone.

What the team can't see

Clients Todd keeps to himself, and Todd's private notes. A hidden client gets the same "not found" as one that doesn't exist. When who can read a record changes, the client is told in their thread.

Nameless outside the app

Notifications say "New message", unless the client chooses previews and confirms it. Emails are just as quiet: no client name and no Todd in the subject. Calendar entries carry no name.

Your data

Each client can see who reads their record and since when, what is shared with them, what is kept for Todd and the team, where it comes from, and which services process it. From there they can:

- export their record at any time;
- ask to remove one thing: a message, a document or a transcript;
- ask formally for everything held about them, with a date it must be done by;
- ask for everything to be deleted. Afterwards, only a receipt without a name is kept.

The audit trail

Each time a client's record is opened or changed, by whom and when, Claude Code included.

His skills, his voice

Skills, with versions

Every instruction behind a draft lives in the app as one of Todd's skills, seeded from his skills repo. An edit is a new version, and nothing changes until Todd makes it live. A team member can suggest a change, and it waits for him. He sees exactly what changed and why, can try it on a past session first, and can roll back in one step. Every draft records the version that wrote it.

His voice

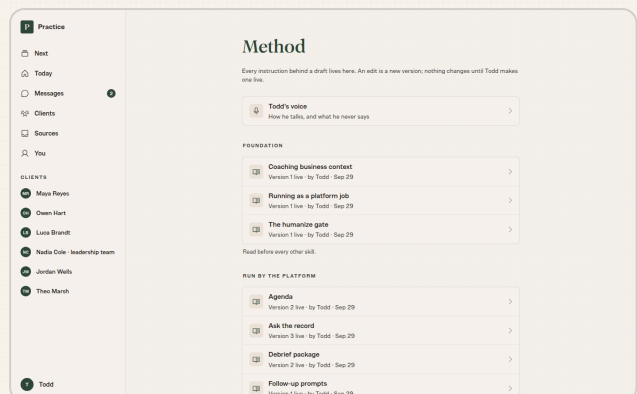
How he talks, the words he uses, what he never says, examples of how he writes, and how long a message between sessions should be. Marking a phrase in a draft ("Don't say it like that") adds it to what he never says, or to one client's tone rules.

Each client's tone

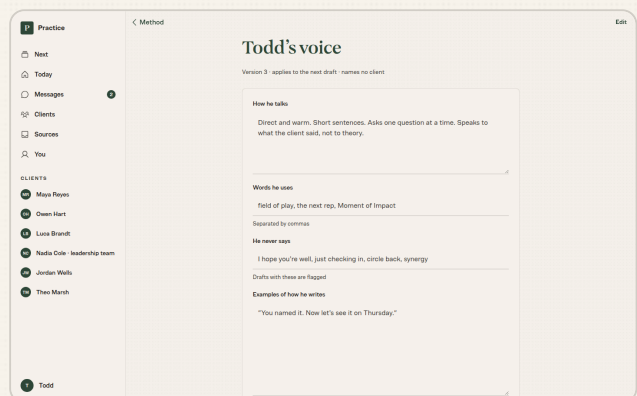
Rules for one client: "Direct. Likes the numbers first, then the story."

Claude Code

Connected from day one. It reads only the clients the person using it can see, runs Todd's library skills (decks, worksheets, routines, frameworks), and saves the results back as drafts for Todd. It can never send anything to a client.



Method: every skill, and the version that is live.



Todd's voice.

Built in phases, each one to keep

Nothing in any phase is temporary. After the first, Todd and the team can sign a new client and coach them start to finish here. The order of the later phases can follow Todd's priorities.

1	Coach a new client, start to finish	Here now, in the films. Adding and onboarding a client, the synthesis and the plan, kickoff, the weekly loop with agendas and debrief packages, Next, Messages, the Inbox and Granola, the team, Todd's skills and voice, Claude Code, and each client's data rights.
2	Existing clients, and files both ways	Bring an existing client in from their folder, one at a time, with a preview Todd confirms. The whole practice as files, a nightly copy on our own storage, and the history of every record.
3	Todd in flow	Next sized to the time he has. Monday prompts: five candidates per client, the team picks three, one swipe to send. Signals from Todd's rules, like a Leverage Point untouched by session five. Rules learned from his edits, and sending in the client's morning.
4	The whole season	Checkpoints at day 30 and 60 with the checks done, Moments of Impact, day-85 pre-work and the season review, renewal, and a leadership team as one engagement.
5	Custom forms and assessments	Todd's intake and questionnaires built in the app instead of pasted in, with answers landing straight in the record.
6	From application to kickoff	An application form on Todd's site, triage on his four filters, a research brief and a right-fit call guide for every yes.
7	Calls in the app	Sessions inside the app, alongside Zoom and in person, with the same debrief package afterwards.
8	Memory that learns	A journal for Todd by voice or text, his method and frameworks linked in one place, profiles refreshed every night, and Gmail and Drive joining each record.
9	The iPhone app	Everything in the web app, as an iPhone app: Face ID, calls that ring like phone calls, a discreet name and icon.

Todd's words, as the app uses them

Season	The 90 days of an engagement, in three phases: Diagnose and Install, Build and Activate, Deploy and Integrate.
Through Line	The one sentence that runs under everything a client brings.
Leverage Points	The few places where a small change moves a lot. Three or four, one per line.
Watch Items	What to keep an eye on, session to session.
Agenda	Todd's prep for a session: the framework and why, the zones, Leverage Points so far, Watch Items and open commitments.
Debrief package	Everything after a session in one piece to review: a strategic debrief for Todd, a post-call summary for the client, a follow-up, and updates to the record.
Post-call summary	What the client reads: the Key Insight, commitments with dates, the Next Call Focus and Todd's Note.
Moment of Impact	A real high-stakes event: a game, a board meeting, a hard conversation. A prompt goes out 24 to 48 hours before it, never the morning of.
Next	Todd's short, ranked stack of what needs him.
Needs a home	Where anything waits when the system isn't sure whose it is.
Just Todd	A message a client marks for Todd alone.
Shared, Todd-side, Todd-only	The three layers. Clients see shared. The team sees shared and Todd-side. Todd-only is Todd's.
Team-visible, Todd-only client	Who can read a client's record: the whole team, named team members, or only Todd.
Skill	The instructions behind a draft, versioned in the app. Every draft records the version that wrote it.

Watch it working

Short films with captions, recorded in the app with a made-up client, Theo Marsh, from the day he is added to his first month.

00	The whole thing in two minutes	One moment from each film, in order.	1:41
01	Adding a client	Todd adds Theo: who can see him, the kickoff date, the welcome in Todd's words.	0:57
02	Onboarding	Theo signs in with a code, reads how it works, answers the intake, sets his baseline and uploads his four reports.	1:35
03	The profile synthesis	The gap interview, then the synthesis drafted with its sources, and Todd approving it.	1:20
04	Kickoff and the plan	Tracks drafted, set live with Theo at kickoff, and the day-1 version kept.	1:28
05	Todd's Today	Todd's day on his phone, and matching calendar events to clients.	0:49
06	Before a session	Reflection questions approved, answered by voice, and the agenda two hours before.	1:21
07	After a session	The transcript arrives, the debrief package is reviewed and approved, and Theo reads his summary.	1:11
08	Next	Todd's short stack: a reply in his voice, a phrase he'd never say, a call request.	1:04
09	Messages	Theo's thread: voice notes, files, Just Todd. Todd's side, a reply suggestion, search.	1:15
10	Clients at a glance	The clients list, the journey board, one client in depth, and Ask the record.	1:18
11	Inbox and matching	A meeting with two clients, split line by line. The log, and taking something back out.	0:50
12	The team	Who reads what, what Jamie can't see, and a hand-off to Todd.	0:57
13	The monthly rhythm	The plan's monthly update with Theo, a shift, and the budget.	0:59
14	Privacy and trust	Nameless notifications, Your data, an export, a formal request, the audit trail.	1:10
15	Todd's method inside the app	A skill change from Jamie, approved and made live by Todd; his voice; tone rules; Claude Code.	1:03