



FranklinCovey Coaching Portal

PROJECT BRIEF | FEBRUARY 2026 | CONFIDENTIAL

About FranklinCovey

FranklinCovey is a publicly traded global leadership development company. Their Executive Coaching practice manages 150+ coaches worldwide, 250+ active coaching engagements across 65+ client organizations, and maintains a 97% coaching success rate (vs. 50% industry average). They hit 52% of their annual goal in Q1 2026 alone. A \$6.9M USPS deal is in pipeline where data reporting capabilities are a key evaluation criterion. This is a major enterprise with real scale and real urgency.

The Opportunity

FranklinCovey has a 400-participant coaching engagement launching in the coming weeks across 4 programs. Their legacy portal (built 2011 by RGP, crashed 2023, cost \$20K just to restore) is failing. Budget for a replacement was cut 3 years running. Manual reporting takes 2+ weeks per cycle. Their ops coordinator (Abby) spends ~40% of her job generating PDF reports by hand. With Abby on maternity leave, Andrea (Director of Ops) spent 2 weeks getting through 75% of 60 engagements. They explored Salesforce but found it expensive and generic. They chose CIL because we understand coaching, not just code.

Greg Smith (VP, budget authority) approved the project with no sticker shock. His directive: build the overall portal architecture for ALL of FranklinCovey's coaching engagements, then fill in this immediate use case first. **This is the beginning of the central technology platform they want to build for their entire coaching organization.** The full build becomes repeatable work, and the advisory component anchors CIL inside FranklinCovey to solve additional needs over time.

Who Was on the Call (Feb 12)

Greg Smith - VP, budget authority. Sharp, strategic. Expanded scope from 'build a tool' to 'build the coaching platform architecture.' Compared us favorably to Salesforce: 'more capability, less money, and you understand coaching.' Said yes to advisory immediately, called it 'a clear accelerant.' His success metric: 'Do more with less. Drive efficiency and quality.'

Kari Saddler - Director of Coaching (master coach). Built her own prototypes in Lovable (~12 hours). She knows exactly what she wants. Gave us edit access to her Lovable playground. Her success metric: 'When we get stability, we'll have space to actually disrupt and move this practice forward.'

Andrea Sherman - Director of Operations. Drowning in manual work. 'We just need a user-friendly platform that flags us when things aren't happening. Proactive instead of reactive.' Also: 'I don't want the coaches to have one more IT headache.' Freeing Andrea and her team is one of the primary outcomes.

Additional context: The platform frees 'intellectual horsepower' so the team can innovate instead of firefight. It creates career paths for ops staff (Abby, Andrea) currently trapped in manual work. Kari described it as the 'Model T' foundation for deeper innovation.

Kari's Lovable Prototype (Edit Access Granted)

<https://lovable.dev/projects/e91f5432-4586-4210-a51d-f66e8b54378a>

Kari built this herself over ~12 hours as an interim solution. Review before Tuesday. Her notes on what she uses:

- **Supervision workspace** - select a coach, take notes, add notes, track conversations about their work
- **Coaches page** - search for coaches by experience, specialties, locations
- **Milestone report** - wants all engagements uploaded and maintained here
- **Group Coaching** - actively tracking several group engagements with reporting/metrics (but NOT integrated with individual coaching data; separate reports)
- **SurveyMonkey dashboard** - separate page with rolled-up imported survey data for aggregate views (before this, only individual coach surveys with no baseline comparison)
- Main Dashboard at top is not helpful (her words)

This shows exactly how she thinks about workflows and what we need to professionalize and scale.

What We're Building (March MVP)

1. Coach Selector Tool - client preview by late Feb, live by March 2

- Participant receives email link, enters approved email, sees 3 available coaches (bio, video, Calendly link)
- Capacity-weighted randomization to prevent coach overload
- 400 participants across 4 programs. Half get 2 sessions, half get 5. 5-session cohort gets 20-min interview option
- No login required. Filter by location, credential, skills, language

2. Coach Portal - live March 16

- Secure login. Coaches see assigned participants, log sessions via structured dropdowns ONLY (no free text)
- Fields: session number, date/time, topic (from top 20 objectives list), outcome/milestone
- Ensures all 35 coaches calibrated to FC methodology. Milestone tracking with automated alerts
- Coach-facing UX must be very simple and low-friction

3. Ops Dashboard - live March 16

- All engagements at a glance. Overdue flags, automated email alerts, CSV export, printable reports
- Replaces manual PDF generation (currently 2+ weeks for 60 engagements)
- Monthly reports show only new activity (not 20+ page historical dumps)
- Configurable: add new programs, update profiles, change methodologies without needing us

Technical Requirements

Hosting: FranklinCovey infrastructure (not external cloud). FC owns the code. No third-party platform dependency.

Deployment: Dockerized application to FC container registry. CI/CD pipeline TBD with Blaine (CTO).

Database: Managed PostgreSQL. Provisioning process TBD with Blaine.

Security: PII involved (executive data). NDA/IT procurement required. Role-based access control. Must align with FC auth/identity standards.

Scalability: Multi-org, multi-program, role-based views. Configurable without rebuilds. Global-ready (future multilingual, not Tier 1).

URL: Production URL (e.g., coaching.franklincovey.com). DNS coordination required.

Email: Outbound email for automated notifications/reminders. Restrictions TBD.

Maintenance: Defined support arrangement for bug fixes + small enhancements. Transparent ongoing infra and API costs.

Product Functionality Details

- Role-based access for ops (Andrea/Abby), coaches, sponsor teams, internal leaders
- Ops/coaches can self-manage data: create/edit coach profiles (bios, certifications, Calendly links, videos)
- Add/update programs and methodologies without new builds
- Create/manage: client/organization instances, individual coaching engagements, sponsor teams (coachee, leader, HR/talent partner)
- Track milestones, activities, engagement progress from start to completion
- Automated reminders/flags when timelines and milestones are missed
- At-a-glance dashboards for: ops (all engagements), Kari (per-coach status across clients), Greg (portfolio-level quality)
- Better metrics collection beyond current SurveyMonkey end-of-engagement surveys
- Future: AI-assisted insights (not AI coaching, but augmentation of coaching data)

Technical Questions for Blaine (CTO) - Sent, Awaiting Response

1. Current hosting environment? (AWS, Azure, GCP, on-premise, mix?)
2. Docker container image to container registry? Which registry?
3. CI/CD pipeline to integrate with, or do we set one up?
4. Database provisioning process? (We recommend PostgreSQL)
5. Production URL setup (e.g., coaching.franklincovey.com)? Who controls DNS?
6. Security/compliance requirements? (SSO, encryption, data residency?)
7. Restrictions on outbound email services?
8. NDA / IT procurement timeline?

Timeline

Feb 13 (Tomorrow): Tim + Amit align on scope, architecture, capacity, and plan

Feb 14-17: Potential in-person work session. Finalize proposal deck.

Feb 18 (Tue): Discovery workshop with FC team, 9-11 AM CT. Bring mockups + recommended model.

Late Feb: Coach Selector ready for client preview

March 2: Coach Selector live to 400 participants

March 9 week: Amit unavailable (Mayo Clinic). Need plan for gap.

March 16: Full portal + ops dashboard live