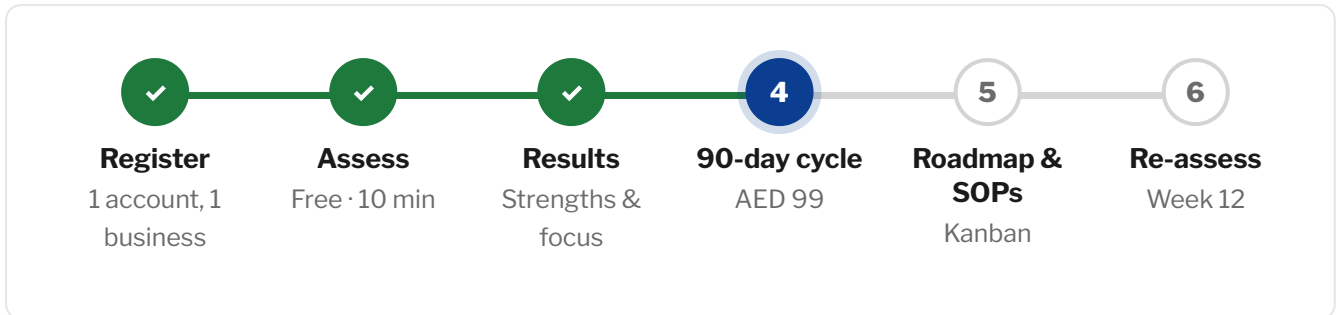


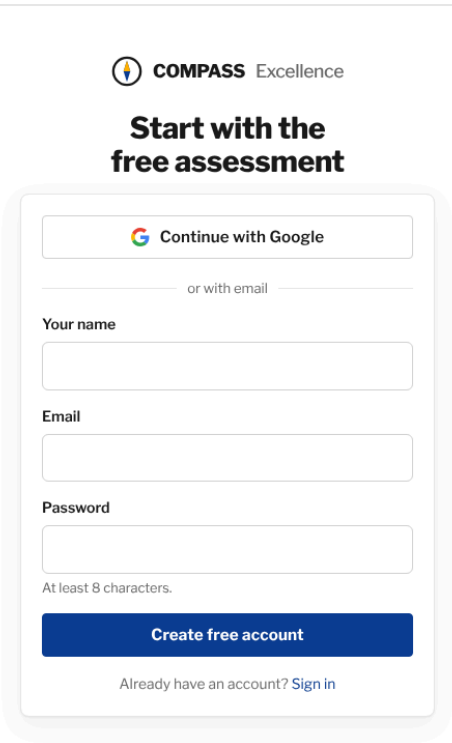
How to use COMPASS

A visual, step-by-step guide from your first assessment to a finished 90-day cycle.



1. Create your account and register your business

One account per person, and each account registers one business. Your business gets its own private workspace.



The screenshot shows the COMPASS Excellence account creation interface. At the top, the logo 'COMPASS Excellence' is displayed. Below it, the heading 'Start with the free assessment' is centered. The form itself is a white box with a blue border. It features a 'Continue with Google' button with the Google logo. Below this, a link 'or with email' is shown. The form has three input fields: 'Your name', 'Email', and 'Password'. The 'Password' field has a note 'At least 8 characters.' below it. A blue 'Create free account' button is at the bottom of the form. Below the button, a link 'Already have an account? Sign in' is visible. At the bottom of the entire page, a grey bar contains the text 'Sign up with Google or with email and password.'

- 1 Open the site and click Take the free assessment.
- 2 Choose Continue with Google, or enter your name, email and a password (8+ characters).
- 3 Enter your business name, type and the number of people (count regular freelancers too).
- 4 Click Create workspace and start the assessment.

Tip

Signed up with email and later used Google with the same address? It is the same account. Team members join through an invitation from the owner (see Team).

2. Take the free assessment

54 statements about how the business really runs: 6 for each of the 7 COMPASS components and 12 for the business areas. About 10 minutes.

COMPASS Excellence

Workspace
Al Noor Cafe (sample)
90-day cycle · 75 days left

Home

Assessment

- Results report
- Daily routine
- 90-day roadmap
- SOP studio
- SOP library
- Decision tools
- Team
- Plan & billing
- Your data

HELP

- Help centre
- Contact support

C · Cash

Statement 1 of 54

Business money is kept fully separate from personal money.

1 Never 2 Rarely 3 Sometimes 4 Usually 5 Always

◀ Back Tip: press 1-5 on your keyboard Next ▶

One statement at a time; press 1-5 on your keyboard to answer.

- 1 Read each statement and rate it from 1 (never) to 5 (always) for how things are today.
- 2 The next statement appears automatically; use Back to change an answer.
- 3 Your progress saves as you go, so you can close the page and come back.
- 4 Click See my results on the last statement.

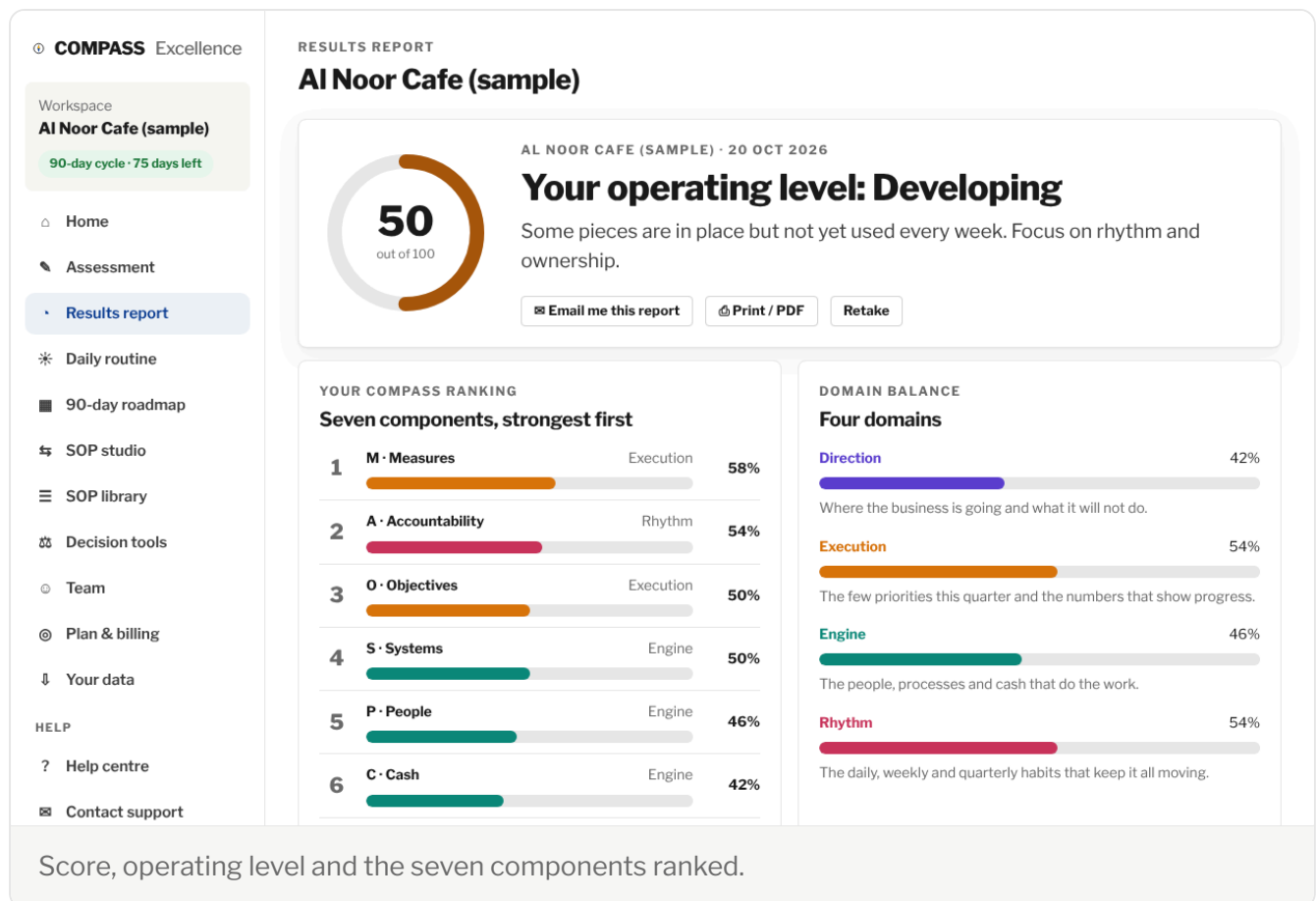
Tip

Answer for what happens now, not what you plan.

Retake it at week 12 of the 90-day cycle to measure progress.

3. Read your results report

Your report shows where you are strong and where to focus first.



- 1 Read your score out of 100 and your level: Starting, Developing, Established or Excellent.
- 2 Check the ranking of the seven components and the balance of the four domains.
- 3 Read your top 3 strengths and 3 focus areas, each with a first move.
- 4 Scroll down for the health of your 12 business areas and how you map to 10 excellence models.
- 5 Click Email me this report to keep a copy.

Tip

Decision models matched to your weakest areas appear on the report; click one to use it.

4. Run the 20-minute daily routine

COMPASS runs every day: 10 minutes to start the day and 10 to close it.

The screenshot displays the COMPASS Excellence interface. On the left is a sidebar with navigation options: Home, Assessment, Results report, Daily routine (selected), 90-day roadmap, SOP studio, SOP library, Decision tools, Team, Plan & billing, Your data, and a HELP section with Help centre and Contact support. The main area is titled 'COMPASS RUNS EVERY DAY' and 'Daily routine'. It shows 'TODAY · 2026-10-20' and 'Your daily routine' with an 'Autosaves' button. A progress bar at the top indicates three stages: 1. Start the day (10 min · before messages, 3 of 4 done, 'In progress'), 2. Focus block (Top 3 outcomes, 2 of 3 done, 'Completed'), and 3. Close the day (10 min · before shutdown, 0 of 4 done, 'Up next'). Below this, the 'Start the day 10 minutes' section lists four tasks: 'Bank balance checked; today's payments in and out noted' (Cash, 2 min, checked), 'Yesterday's key numbers checked; red ones added to the issues list' (Measures, 2 min, checked), 'Today's top three outcomes written (one moves an objective)' (Objectives, 3 min, checked), and '90-minute focus block booked for outcome 1' (Accountability, 3 min, unchecked). The 'Close the day 10 minutes' section lists four tasks: 'Top three marked done or not done' (Objectives, 3 min, unchecked), 'My scorecard numbers updated' (Measures, 3 min, unchecked), 'New items moved to the issues list; tomorrow's first task set' (Accountability, 2 min, unchecked), and 'Daily log: score 1-10 and one thing learned' (Accountability, 2 min, unchecked). A 'Day score (1-10)' field is at the bottom. A grey banner at the bottom states: 'Start and close the day; the flow at the top shows what is done.'

- 1 Morning: tick the four start items and write today's top three outcomes.
- 2 Book a 90-minute focus block for outcome 1.
- 3 Evening: tick the four close items, give the day a score and note one thing learned.
- 4 Watch the 14-day streak; aim for 4 of every 5 days.

Tip

Never miss twice. On a bad day, do the 3-minute version: bank balance, one priority, tick it off.

5. Start the 90-day improvement cycle (AED 99)

One payment unlocks 90 days of roadmap, all decision models and calculators, SOP editing, weekly email reports and AI coaching.

COMPASS Excellence

Workspace

AI Noor Cafe (sample)

90-day cycle · 75 days left

Home

Assessment

Results report

Daily routine

90-day roadmap

SOP studio

SOP library

Decision tools

Team

Plan & billing

Your data

HELP

Help centre

Contact support

Plan & billing

1

Free plan

Assessment + report

Completed

2

Pay AED 99

Ziina secure checkout

Completed

3

90 days of improvement

75 days left

In progress

4

Next cycle

Re-assess and repeat

Up next

CURRENT PLAN

90-day improvement cycle

Started 04/10/2026 · ends 02/01/2027 · **75 days left**

When it ends, your data stays. Start another cycle to keep the roadmap, AI and SOP editing active.

HISTORY

DATE	AMOUNT	STATUS
20/10/2026	AED 99.00 (test)	completed

1 cycle(s) run.

The plan flow shows each stage of your subscription.

- 1 Take the assessment first, so the plan can be built from it.
- 2 Click Start the 90-day cycle · AED 99.
- 3 Pay on Ziina's secure page (card, Apple Pay or Google Pay).
- 4 You return to your 90-day roadmap, already filled with your tasks and SOPs.

Tip

There is no subscription; start another cycle when this one ends. Your data stays.

6. Work through the roadmap on the kanban board

The 13-week plan has five phases. The flow diagram shows what is completed, what is in progress and what is next.

COMPASS Excellence

Workspace
Al Noor Cafe (sample)
90-day cycle · 75 days left

Home
Assessment
Results report
Daily routine
90-day roadmap
SOP studio
SOP library
Decision tools
Team
Plan & billing
Your data

HELP
Help centre
Contact support

AL NOOR CAFE (SAMPLE)
90-day roadmap

90-DAY ROADMAP · WEEK 3 OF 13

Cycle progress 7 / 37 · 19%

Phases: what is done and what comes next

1	2	3	4	5
Start the habit Weeks 1-2	Seats, numbers & cash Weeks 3-4	Strategy & objectives Weeks 5-6	Systems & SOPs Weeks 7-10	Quarterly reset Weeks 11-13
Completed	In progress	Up next	Up next	Up next
7 of 7 done	0 of 8 done	0 of 10 done	0 of 8 done	0 of 4 done
Show tasks	Showing	Show tasks	Show tasks	Show tasks

DO THESE NEXT

People	Week 3
Fill in the seat card	Done
Details	

Measures	Week 3
Build the weekly scorecard	Done
Details	

People	Week 3
Write 3-5 core values and use them in feedback	Start
Start	Done
Details	

All phases 1. Start the habit 2. Seats, numbers & cash 3. Strategy & objectives 4. Systems & SOPs 5. Quarterly reset

Later 0 To do 6 In progress 2 Done

Planned for a later week This week's work

Write 3-5 core values and Fill in the seat card Drop a card here

Five phases; each shows how many tasks are done.

- 1 Start with the Do these next cards at the top: click Start, then ✓ Done when finished.
- 2 Use the kanban board below: drag a card to another column, or use the ◀▶ buttons.
- 3 Click a phase's Show tasks to focus on that phase.
- 4 Open Details on a card to see its SOP, decision tool and helpful decision models.
- 5 Add your own task at the bottom of the board.

Tip

In the cycle, AI can break any task into steps for your business.

COMPASS Excellence

Workspace

Al Noor Cafe (sample)

90-day cycle • 75 days left

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Help centre

Contact support

All phases1. Start the habit2. Seats, numbers & cash3. Strategy & objectives4. Systems & SOPs5. Quarterly reset

Later0

Planned for a later week

Drop a card here

To do6

This week's work

Write 3–5 core values and use them in feedback

Week 3 • People & culture

People

Done

Details

Decide with data: LTV : CAC

Week 3 • Customer service & success

SystemsDecision tool

Done

Details

Build the 13-week cash forecast and set the buffer

Week 4 • Finance & cash

CashDecision tool

Done

Details

Hold the first weekly review

Week 4 • Leadership & strategy

AccountabilitySOP

In progress2

Fill in the seat card

Week 3 • People & culture

People

Done

Details

Build the weekly scorecard

Week 3

Measures

Done

Details

Done

Drop a card here

The kanban board: Later, To do, In progress, Done.

7. Create your SOPs in the SOP studio

SOPs (standard operating procedures) are the checklists that let others do the work the same good way every time.

COMPASS Excellence

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STANDARD OPERATING PROCEDURES
SOP studio

SOP STUDIO
From needed to live

SOPs live 1 / 6 · 17%

1 Needed 2 SOPs
2 Drafting 2 SOPs
3 Approved 1 SOP
4 Live 1 SOP

Needed SOPs (24) **SOP board (6)** SOP library (32)

Needed 2
Identified, not started
Refund and credit note approval
Customer service & success
Finance & admin
Live Open
Customer complaint handling
Customer service & success
Delivery
Live Open

Drafting 2
New client onboarding
Customer service & success
Delivery
Live Open
Daily opening and closing checklist
Delivery & operations
Delivery
Live Open

Approved 1
Signed off, training due
Food safety (HACCP-based) daily controls
Delivery & operations
Delivery
Live Open

Live
Followed by everyone
Cash handling and dai cash-up
Finance & cash
Finance & admin
Open

SOPs move from Needed to Live on their own board.

- 1 Open Needed SOPs: these are suggested from your weakest areas and business type.
- 2 Click Add to board to start from a proven template.
- 3 Open the SOP to edit its steps, roles and decisions; the flowchart updates as you type.
- 4 Move it across the board: Needed → Drafting → Approved → Live.
- 5 Click ↓ Download as image to save the SOP as one picture: the written steps beside the flowchart, ready to print or share on WhatsApp.

Tip

Describe any process and AI drafts a custom SOP as a flowchart (90-day cycle).

8. Browse the SOP library

Every proven SOP template in one place, grouped by business domain. New templates added by the COMPASS team appear here automatically, marked New.

COMPASS Excellence

Workspace
Al Noor Cafe (sample)
90-day cycle · 75 days left

- Home
- Assessment
- Results report
- Daily routine
- 90-day roadmap
- SOP studio
- SOP library**
- Decision tools
- Team
- Plan & billing
- Your data
- HELP
 - Help centre
 - Contact support

STANDARD OPERATING PROCEDURES
SOP library

SOP STUDIO
From needed to live

SOPs live 1 / 6 · 17%

1 Needed 2 SOPs 2 Drafting 2 SOPs 3 Approved 1 SOP 4 Live 1 SOP

Needed SOPs (24) SOP board (6) **SOP library (32)**

32 proven SOPs in 10 business domains. Preview the flow, read the details, or copy one to your board. Search SOPs, e.g. refund, c

All domains 32 Leadership & strategy 2 Marketing & brand 1 Sales 2 Customer service & success 3 Delivery & operations 5 Finance & cash 6 **People & culture 4** Suppliers & partners 3 Legal, risk & compliance 3 Technology & data 3

Leadership & strategy 2 SOPs · core process: Accountability rhythm

Accountability rhythm
Weekly review meeting
Run the business from numbers, priorities and issues every week.
8 steps · Owner: Leader · Based on: COMPASS weekly agenda (EOS Level 10 style); 4DX cadence
Preview flow Details Use template

Accountability rhythm
Continuous improvement (PDCA)
Improve one process at a time with evidence.
7 steps · Owner: Leader · Based on: Deming PDCA cycle
Preview flow Details Use template

SOPs grouped by business domain; the numbers show how many each domain has.

- 1 Open SOP library in the menu.
- 2 Click a domain, such as Finance & cash or Sales, or search a word such as refund or onboarding.
- 3 Click Preview flow to see the flowchart, or Details for the full SOP.
- 4 Click Use template to copy it to your SOP board and adapt it (90-day cycle).

Workspace

Al Noor Cafe (sample)

90-day cycle · 75 days left

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90-day roadmap

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Decision tools

Team

Plan & billing

Your data

HELP

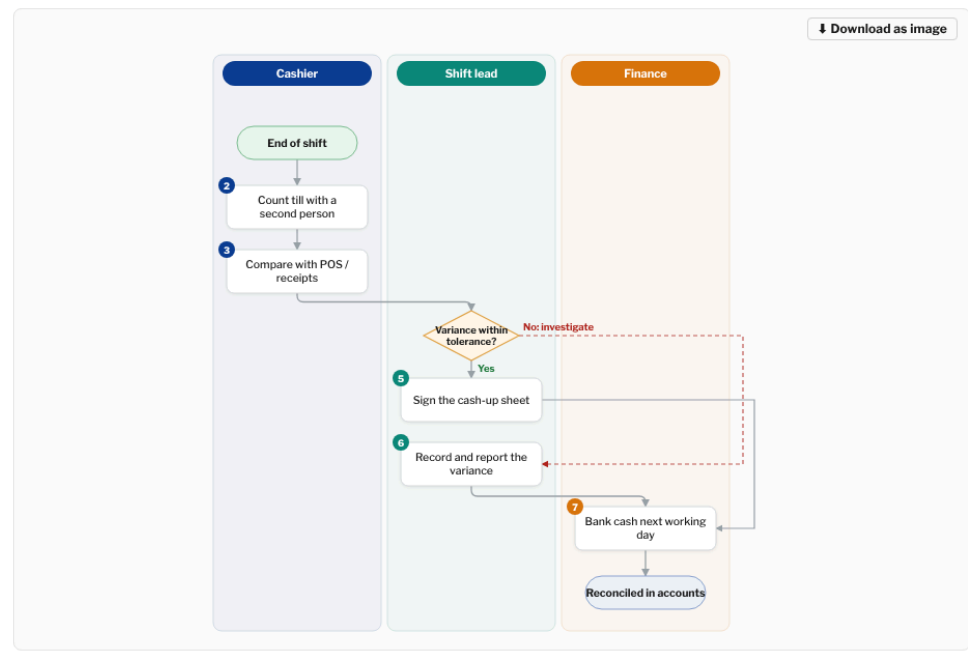
Help centre

Contact support

Flowchart

● Start ● Step ● Decision ● End --- "No" path

Download as image



Steps

Each SOP is drawn as a swimlane flowchart: one lane per role, green = start, amber = decision, dashed red = the 'No' path.

9. Decide with the right model

153 business scenarios mapped to 51 proven decision models, plus 34 calculators.

COMPASS Excellence

Workspace

Al Noor Cafe (sample)

90-day cycle · 75 days left

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Results report

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90-day roadmap

SOP studio

SOP library

Decision tools

Team

Plan & billing

Your data

HELP

Help centre

Contact support

DECISION TOOLKIT · 51 DECISION MODELS · 34 CALCULATORS

Decide with the right model

Decision models · 51

Calculators · 34

Decision log (1)

DECISION MODELS · 51

Find your scenario, use the model that fits

153 business scenarios mapped to 51 proven decision models, each linked to COMPASS and your business areas, with an interactive worksheet and live diagram.

Scenario map

Find by question

All 51 models

Coverage map

Search a scenario, e.g. discount, hire, supplier, launch, conflict

All business areas

153 scenarios

Leadership & strategy · Leader

SCENARIO	DECISION MODEL TO USE	COMPASS
Testing a new branch or second location for you	SWOT Analysis How do I find the right solution?	S Use model
Preparing the annual plan's strategy section for you	SWOT Analysis How do I find the right solution?	S Use model
Assessing readiness for an excellence award for you	SWOT Analysis How do I find the right solution?	S Use model
A consultant choosing which clients to keep	Project Portfolio Matrix How do I keep an overview of all my projects?	O S Use model
Reviewing the active project list at the quarterly reset	Project Portfolio Matrix	O S Use

The scenario map: find your situation, then use the model it points to.

- 1 Open Decision tools. The Scenario map lists situations by business area.
- 2 Search a word such as discount, hire, supplier or launch, then click Use model.
- 3 Or use Find by question: describe your decision in a sentence.
- 4 Fill the worksheet; the diagram and the result update as you go.
- 5 Click Save worksheet to keep it in the decision log.

Tip

Coverage map shows which models serve each business area and decision type.

Workspace

Al Noor Cafe (sample)

90-day cycle • 75 days left

Home

Assessment

Results report

Daily routine

90-day roadmap

SOP studio

SOP library

Decision tools

Team

Plan & billing

Your data

HELP

Help centre

Contact support

important and now
urgent they are, so the
urgent does not crowd
out the important.

everything feels urgent
and strategic work keeps
slipping.

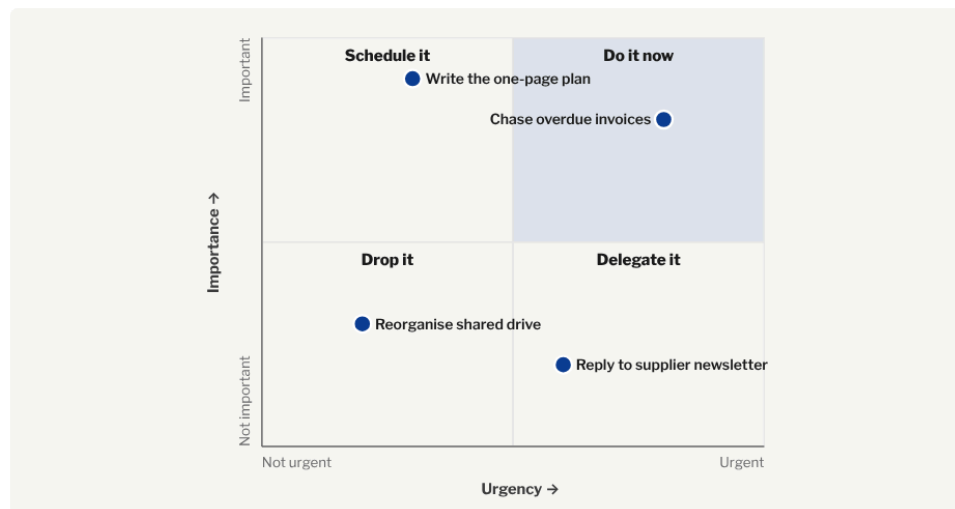
important and urgent: do
it now. Important, not
urgent: schedule it.
Urgent, not important:
delegate. Neither: drop it.

from making progress
and protects time for
important work before it
turns into a crisis.

Worksheet

Reset to example

Graphical presentation: A 2x2 grid: urgency across, importance up, each quadrant carrying its instruction. The example data is a starting point; replace it with your own.



Chase overdue invoices

Urgency 8

Importance 8

Do it now

x

A worksheet: move the sliders and each item lands in its quadrant with an instruction.

10. Use the calculators

Calculators handle the number-based decisions: cash runway, discounts, pricing, hiring, suppliers, risk, automation and more.

COMPASS Excellence

Workspace

AI Noor Cafe (sample)

90-day cycle · 75 days left

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Assessment

Results report

Daily routine

90-day roadmap

SOP studio

SOP library

Decision tools

Team

Plan & billing

Your data

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Help centre

Contact support

DECISION TOOLKIT · 51 DECISION MODELS · 34 CALCULATORS

Decide with the right model

Decision models · 51

Calculators · 34

Decision log (1)

RECOMMENDED FOR YOUR WEAK AREAS

Payment priority ladder

Early-payment discount

Days to get paid (DSO)

Cash-conversion cycle

LTV : CAC

Borrow or not

AI Which tool fits my decision?

Describe the decision in a sentence. AI picks the right calculator and tells you which numbers to gather.

e.g. A client wants 15% off for a 12-month contract. Should I accept?

Suggest a tool

Search decisions

B · PRICING AND DISCOUNT

Discount break-even

Decision: Can we give this discount?

Method: $\text{Extra volume needed} = \text{discount} \div (\text{gross margin} - \text{discount})$

Rule: Approve only if that extra volume is contracted, not hoped for

Discount asked (%)

10

Gross margin (%)

40

Extra volume contracted (%)

20

Extra volume needed to stand still

33%

Recommendation: Not enough contracted volume: hold the price or trade the discount for something (term, deposit, referral).

Note for the decision log (optional)

Log decision

Each calculator gives a recommendation from a clear decision rule.

- 1 Open Decision tools → Calculators.
- 2 Pick a recommended tool or search.
- 3 Enter your numbers; the recommendation updates instantly.
- 4 Add a note and click Log decision.

11. Invite your team

Everyone in your business works in the same workspace.

COMPASS Excellence

Workspace
Al Noor Cafe (sample)
90-day cycle · 75 days left

Home

Assessment

Results report

Daily routine

90-day roadmap

SOP studio

SOP library

Decision tools

Team

Plan & billing

Your data

HELP

Help centre

Contact support

9 PEOPLE · SMALL TEAM MODE

Team

Members

Abhay (sample owner)
abhay@quantumtaskai.com

owner

Pending invitations

staff@example.com · member

Invite someone

Email

Role

Member

Send invitation

Your rhythm in Small team mode

15-min daily huddle + 90-min weekly meeting + half-day quarterly reset

Modes: Solo (1 person) · Small team (2–10 people) · Growing (11–50 people) · Scaling (50+ people)

Owners and admins invite people by email.

- 1 Open Team.
- 2 Enter the person's email, choose Member or Admin, and click Send invitation.
- 3 They accept the email invitation and sign up or sign in.

Tip

Each account belongs to one business. Someone already in another business needs a different email.

12. Export your data

Your data is yours. Export it at any time.

The screenshot shows the 'COMPASS Excellence' interface. On the left is a sidebar with a 'Workspace' section for 'Al Noor Cafe (sample)' showing a '90-day cycle - 75 days left'. Below this are navigation links: Home, Assessment, Results report, Daily routine, 90-day roadmap, SOP studio, SOP library, Decision tools, Team, Plan & billing, and 'Your data' (highlighted). A 'HELP' section at the bottom includes 'Help centre' and 'Contact support'. The main content area is titled 'DATA AND PRIVACY' and 'Your data'. It features four summary cards: 'ASSESSMENTS' (1), 'ROADMAP TASKS' (37), 'SOPS' (6), and 'DECISIONS' (1). Below these is a 'DAILY LOGS' card (6). Two export sections are present: 'Export this workspace' (describing the export of all workspace data) and 'Export my personal data' (describing the export of user profile and decisions). Each has a 'Download everything (JSON)' button. Below the workspace export section is a 'Spreadsheets (CSV, opens in Excel)' section with buttons for 'Assessments and results', '90-day roadmap tasks', 'SOPs and flowcharts', 'Decision log and worksheets', 'Daily routine logs', 'Team members', and 'Payments'. At the bottom of the main area is a section titled 'How your data stays safe'. A footer bar states: 'Download everything as JSON, or any part as a spreadsheet.'

- 1 Open Your data in the menu.
- 2 Owners and admins: click Download everything (JSON), or a spreadsheet button for one part.
- 3 Anyone: click Download my data for your personal data across the app.

Tip

App updates never delete or rewrite your data, and the database is snapshotted every time a new version goes live.

13. Get help

Stuck? Help is one click away in the menu.

COMPASS Excellence

Help centreSign in

SUPPORT

How can we help?

Most answers are in the [visual help centre](#). If you are stuck, send us a message and we will reply by email.

Your name

Email for the reply

Subject

How can we help?

What were you trying to do, and what happened?

Send to support

EMAIL

abhay@quantumtaskai.com

Copy the address into your email app.

HOURS

Sunday–Thursday, 9:00–18:00 Dubai time.

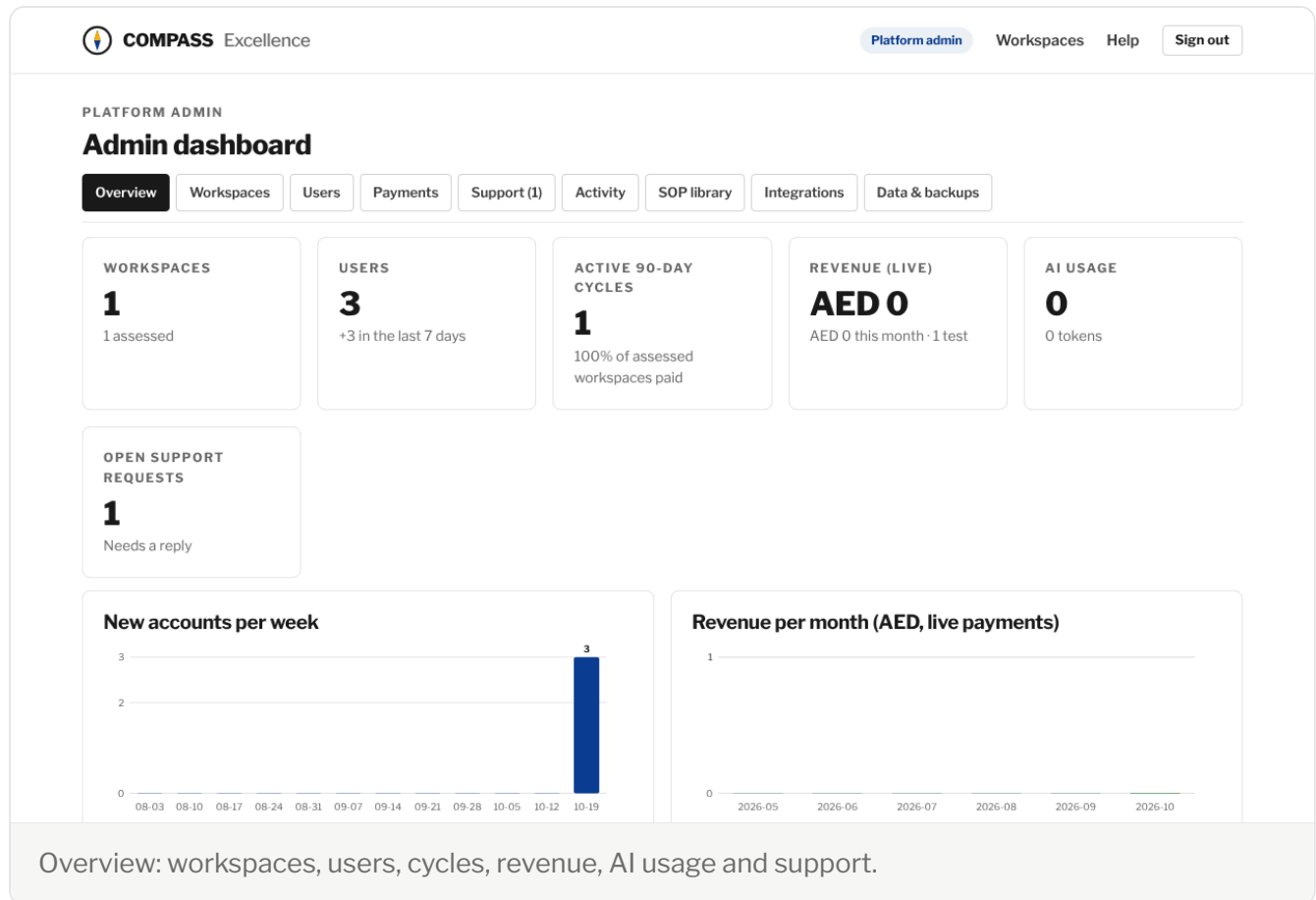
We usually reply within one working day.

Send a request; you get a reference number and a reply by email.

- 1 Click Contact support in the menu (or at the bottom of any page).
- 2 Describe what you were trying to do and what happened.
- 3 You receive a reference number; we reply by email, usually within one working day.

14. Admin dashboard (platform admins) Admins

For the people who run the platform.



- 1 Open Admin dashboard from your workspace list.
- 2 Overview: KPIs, sign-ups and revenue charts, conversion and system health.
- 3 Workspaces, Users, Payments, Activity: searchable lists with CSV export.
- 4 Support: reply by email, then mark requests answered or closed.
- 5 SOP library: add a new SOP for every workspace, or copy a built-in one and adapt it; publish, unpublish, edit or remove it.
- 6 Emails & quotes: edit the text of every system email with a live preview, switch emails on or off, send yourself a test, and add quotes and motivation lines (one at a time or many at once) that the system picks at random.
- 7 Integrations: add the Anthropic, Ziina, email and Google keys; use the test buttons.
- 8 Data & backups: download a full JSON backup.

PLATFORM ADMIN

Admin dashboard

Overview

Workspaces

Users

Payments

Support (1)

Activity

SOP library

Integrations

Data & backups

SOP library

31 built-in SOPs and 1 added by admins. Added SOPs appear in every workspace, grouped by business domain.

Copy a built-in SOP...

+ Add SOP

Leadership & strategy

2

2 built-in

Marketing & brand

1

1 built-in

Sales

2

2 built-in

Customer service & success

3

3 built-in

Delivery & operations

5

5 built-in

Product & offering

0

0 built-in

Finance & cash

6

5 built-in · 1 added

People & culture

4

4 built-in

Suppliers & partners

3

3 built-in

Legal, risk & compliance

3

3 built-in

Technology & data

3

3 built-in

Owner's time & energy

0

0 built-in

Added SOPs (1)

TITLE

DOMAIN

STEPS

STATUS

UPDATED

Admin → SOP library: SOPs per domain, and the SOPs admins have added.

PLATFORM ADMIN

Admin dashboard

Overview

Workspaces

Users

Payments

Support (1)

Activity

SOP library

Integrations

Data & backups

Addresses to register with providers

Google OAuth: authorised redirect URI

http://localhost:3000/api/auth/google/callback

Google OAuth: authorised JavaScript origin

http://localhost:3000

Ziina webhook URL

http://localhost:3000/api/webhooks/ziina

Integrations

Test AI

Send test email

Test Ziina

Send weekly reports now

Secrets are encrypted (AES-256-GCM) before they are stored. Leave a secret blank to keep its current value. Ziina webhook URL: http://localhost:3000/api/webhooks/ziina

Anthropic API key not set

Paste key

Used for all AI features in paid cycles. From console.anthropic.com.

Claude model saved claude-sonnet-5-5

claude-sonnet-5-5

Model id, e.g. claude-sonnet-5-5.

Ziina API key saved ****_key

Enter a new value to replace

From Ziina business dashboard → Connect → API. Type __clear__ to remove.

Ziina test mode saved true

true

'true' creates test payments (no real charge).

Ziina webhook secret not set

Paste key

Shared secret for the X-Hmac-Signature header.

Report sender not set

e.g. COMPASS <reports@yourdomain.com>

Integrations: the addresses to register with Google and Ziina, and the encrypted keys.

Questions

▼ Is the assessment really free?

Yes. The assessment, the full results report, the daily routine, the SOP library and a set of decision models are free.

▼ What happens when the 90 days end?

Your data stays. Roadmap editing, AI and the paid models pause until you start another cycle.

▼ Can I have more than one business?

Each account registers one business. Use a separate account (email) for another business.

▼ What emails will I get?

A welcome, a step-by-step email at each stage (results, the start of your cycle, milestones, halfway, re-assessment and the finish) and a short daily start-your-day email with a quote, your progress and today's checklist. Change them any time under Email preferences in the menu or the link at the bottom of every email.

▼ Who can see my data?

Only people in your business workspace, and the platform admins who support you.

▼ Will an update delete my data?

No. Updates can only add to the database; a release is blocked if it would delete or rewrite existing data, and the database is snapshotted at every release.

▼ How do I cancel?

There is nothing to cancel: each 90-day cycle is a single payment.
