

CASE STUDY

One Login, Not Six

Consolidating a coaching business's scattered client tools into one branded, secure client portal — built with Lovable and Claude AI

Industry: Coaching & Personal Development

My Role: Support & Implementation Specialist

Built on Lovable · Powered by Claude

Overview

The client is a psychologist and coach running a membership-based program supporting women through major life transitions. The program relied on a patchwork of disconnected tools: a course platform for delivery, a page-builder form for daily journaling, separate online forms for weekly and monthly check-ins, and a standalone AI-powered app for guided-audio session search. Clients had no single place to track their progress, and the coach had no overview of how her clients were actually doing.

This case study documents the design and build of a single branded, secure, client-facing portal that consolidates every one of these tools into one coherent product, with a dedicated coach dashboard.

6→1 Tools consolidated into one platform	91+ Tapping sessions organized & searchable	9 Core pages built end to end	3 Automated email sequences live
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The Challenge

The client's own words, in the voice note that started this project, captured the problem clearly:

"It's all split and it feels like it's too much for clients — and I can't find it myself either."

Three distinct problems needed solving:

- **No single client view** — Onboarding lived in the course platform, daily journaling in a separate page-builder form, weekly and monthly check-ins in separate online forms, and guided-audio search in a standalone app. The coach had no way to see a client's full journey in one place.
- **Low completion on high-frequency forms** — Daily and weekly forms had very low completion rates — only a handful of clients kept up monthly submissions, let alone daily ones. Building an app around all of them risked making the experience feel like more homework, not less.
- **No access control** — Existing tools had no way to restrict who could join, no way to revoke access when someone left the program, and no visibility into who was signing up.

The Approach

Rather than rebuilding every existing form immediately, the first step was mapping the full landscape before writing a single line of a build prompt. Every existing tool was catalogued — the onboarding form, the baseline/monthly/weekly trackers, and the daily journal — and organized into a visual structure map so the client could see, and approve, the plan before anything was built.

That mapping surfaced the key strategic decision: given the completion-rate problem, the daily and weekly forms were reframed as an optional, pressure-free personal journal rather than mandatory submissions — while onboarding, the baseline (0/3/6-month), and the monthly check-in remained the three required, coach-visible touchpoints.

Build method

- Structure mapped and approved with the client before any build began
- Built iteratively in Lovable via targeted, additive prompts — each one written to extend the app without disturbing what already worked
- Every build reviewed in preview before publishing to production
- Feedback from the client after each milestone was folded directly into the next prompt

What Was Built

For clients

- **Onboarding** — A five-section discovery form (personal information, current situation, goals, background, optional safe address) completed once, gating access to the rest of the portal.
- **Baseline Tracker** — Ten areas of self-assessment rated 1–10, submitted at Month 0, 3, and 6, with a side-by-side visual comparison so growth is visible in a single view.
- **Monthly Check-in** — A short, focused monthly reflection on commitments, shifts, and old patterns — the one required recurring touchpoint.
- **Personal Journal** — The client's existing daily ritual (morning intention-setting, evening reflection, gratitude, identity anchor) rebuilt as an always-available, no-pressure private space rather than a daily obligation.
- **Wins Wall** — Automatically pulls key moments from check-ins and journal entries into a standalone celebration page.
- **Guided Audio Library** — 91+ audio sessions migrated from the course platform, organized by category, with an AI-powered semantic search — built on the Anthropic Claude API — that lets a client describe how she feels in her own words and receive the most relevant sessions with a short explanation of why each one fits. This replaced a separate standalone app the client had commissioned and was paying for independently, consolidating cost as well as experience.

For the coach

- **Coach Dashboard** — A full overview of every client — current module, last submission, check-in status, and baseline trend at a glance, with a detailed profile view per client.
- **Access control** — Invite-only signup via a single reusable access code (rather than generating individual invite links per client), a Deactivate/Reactivate control for offboarding clients instantly, and one-click code rotation to prevent unauthorized signups.
- **Terms of Use gate** — A mandatory first-login agreement establishing the portal as private and confidential, with clear terms on non-sharing of content.
- **Signup notifications** — Automatic email alerts to the coaching team the moment a new client creates an account.

Automation

- **Monthly check-in reminder** — Sent automatically on day 28 to anyone who hasn't submitted — replacing a manual message the coach previously sent by hand.
- **Baseline reminder** — Triggered at the 3- and 6-month marks with a follow-up a week later if still incomplete — timed around the two moments this data matters most.
- **Journal invitation** — A soft, optional monthly nudge — deliberately gentler in tone than the other two, preserving the journal's feeling of being a private space rather than a task.

Technical Stack

- Lovable — application build and hosting (React + Tailwind)
- Supabase — authentication, database, and role-based access (client vs. coach)
- Resend — transactional email delivery from a verified custom domain
- Anthropic Claude API — semantic search for the guided-audio library
- Custom brand system — Cormorant Garamond and Jost typefaces, a red/cream/black palette (#BD0202 / #F7F4EF / #1A1A1A) applied consistently across every page and email

Security & Trust

Because the portal holds sensitive personal and emotional content, access control was treated as a first-class feature rather than an afterthought:

- Public self-signup disabled — access is gated by a coach-controlled code
- Automated security scans run against the codebase, with issues (privilege escalation risk, exposed data) triaged and fixed before each publish
- Journal entries are visible to the coach as part of the coaching relationship — this is disclosed transparently in-app rather than concealed, preserving trust while still giving the coach the oversight she needs
- Deactivated clients lose access instantly, without needing a parallel process in the original course platform

Outcome

What was six disconnected tools — a course-platform form, three separate online forms, a page-builder diary, and a standalone paid app — is now one branded platform with a single login for clients and a single dashboard for the coach. Manual reminder emails have been replaced with automated, scheduled sequences. The guided-audio library's AI search now runs natively inside the client's existing login rather than a separate paid tool. And the coach has, for the first time, a real-time view of where every client stands in her program.

"This is amazing!!! Feels like — oh, what else can we create?" — Client feedback on first review

What's Next

- Ongoing audio library updates as new sessions are recorded and released
- Full welcome and milestone email sequences (onboarding, baseline reflection, monthly recap) now that the sending domain is verified
- Migration path for existing clients still on the legacy Google Forms and Canva tools
- Exploring whether the audio-search experience could stand alone as a licensable product for other coaches