

Keeping Your Engagement Current

Most of your record-keeping happens session by session (Section 3). Between sessions, there are two things you may want to keep up to date on the engagement itself — its status and any notes — and both are largely at your discretion.

Status. An engagement stays **Active** while you're working with the client. You can change that when the situation shifts:

- Move it to **On Hold** if the mentoring pauses for a while.
- Move it to **Complete** when the engagement has run its course.

This is your call as the mentor, and updating it keeps coordinators informed about where the relationship stands. To change it: open the engagement, select **Edit**, set the **Engagement Status**, and **Save**.

Engagements > Agape W8 Loss 2026-05-15

Save Cancel

Overview Closure Info

Lifecycle and Status

Name * Engagement Start Date

Agape W8 Loss 2026-05-15

Engagement Status *

- Active
- Submitted
- Declined
- Pending Acceptance
- Assigned
- Assignment Declined
- Assignment Dormant
- Active
- On-Hold
- Dormant

Meeting Cadence

Weekly

Referring Partner

ECDI - Economic & Comm

Assigned Mentor

Douglas Bower

Mentor Requested

6a0895d37ca798119

Client

Agape Mentor Request - 1

Primary Engagement Contact

James Koran

Education *

Mentoring Needs Description *

Notes. Where you keep your notes is up to you. You can record developments on the **engagement** itself, or keep them on the individual **Sessions** as you go. Either works — choose whatever keeps your record clear and easy to pick up later. Many mentors keep the meeting-by-meeting detail on the Sessions and use the engagement only for the bigger picture.

Mentoring Needs Description *

B

I

U

14

A

T

Help us figure out marketing

Engagement Notes

B

I

U

14

A

T

B. Modest showcase. Same as A, plus a small header block at the top of the dialog body containing: the app wordmark "CRMBuilder v2" in `font.size.heading_2` (22px), `font.weight.semibold`, `color.neutral.900`, with a short tagline below in `font.size.small`, `color.neutral.500` (e.g., "Methodology-aware CRM implementation tooling"). The metadata table renders below the header. Visually marks the About dialog as a slight identity moment without overdoing it. Modest visual interest; no logo/illustration.

C. Full showcase with brand mark. Same as B, plus a custom-rendered brand mark (an SVG drawn from Lucide-style strokes, or a small custom mark) at the top of the header block, ~48×48px, in `color.accent.default`. The dialog becomes a deliberate identity moment — what someone screenshots when they say "this is CRMBuilder v2." Requires authoring a brand mark, which is in scope for the styling pass but adds a small design subtask.

Session Analytics

Adding a co-mentor, or stepping off an engagement. You can also change who's mentoring an engagement. To bring in a **co-mentor**, add them to the engagement's **Assigned Mentor** and **Assigned Users** fields; for them to see the client's people and record, they'll also need to be the **Assigned User** on the engagement's contacts and the client (your Client Assignment team can help with this). To **step off** an engagement and hand it to someone else, remove yourself from those fields once another mentor is in place — that transfers the client to them.

In short. Move an engagement to On Hold or Complete when the situation calls for it, and keep your notes wherever suits you — on the engagement or on its Sessions. The aim is simply a record that you, a coordinator, or another mentor could pick up and understand.

Revision #1

Created 2026-06-17 21:08:41 UTC by Admin

Updated 2026-06-17 21:09:58 UTC by Admin