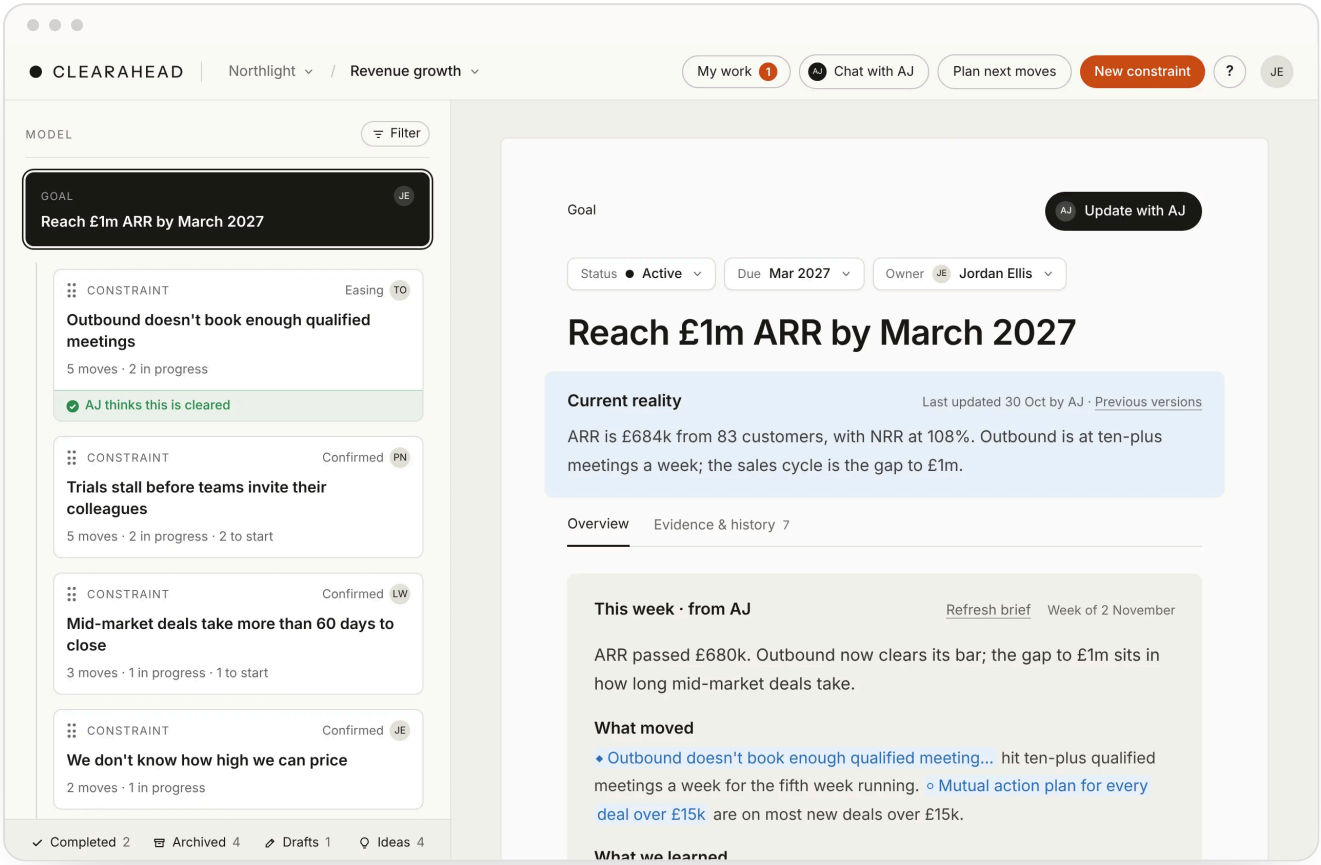
CLEARAHEAD

PARTNER KIT · 2027 PLANNING EDITION

Bring Clearahead to your next client.

For business coaches, strategists, mentors and advisers who work with founders and leadership teams.

clearahead.ai/advisers



The plan you agree in the room: the goal at the top, the constraints holding it back underneath, each with an owner.

01

Pick the right client.

Everything you need to take a client from a planning session to a plan that keeps moving. It starts with the right client: a leadership team that shares a goal, with different people owning different parts of it.

- ✓ A founder-led team of 4 to 200 people.
- ✓ An AI-native startup, or a company moving to AI.
- ✓ A goal the leadership team shares, with a few people to own different parts of it.
- ✓ A regular leadership meeting, or one you're helping them start.

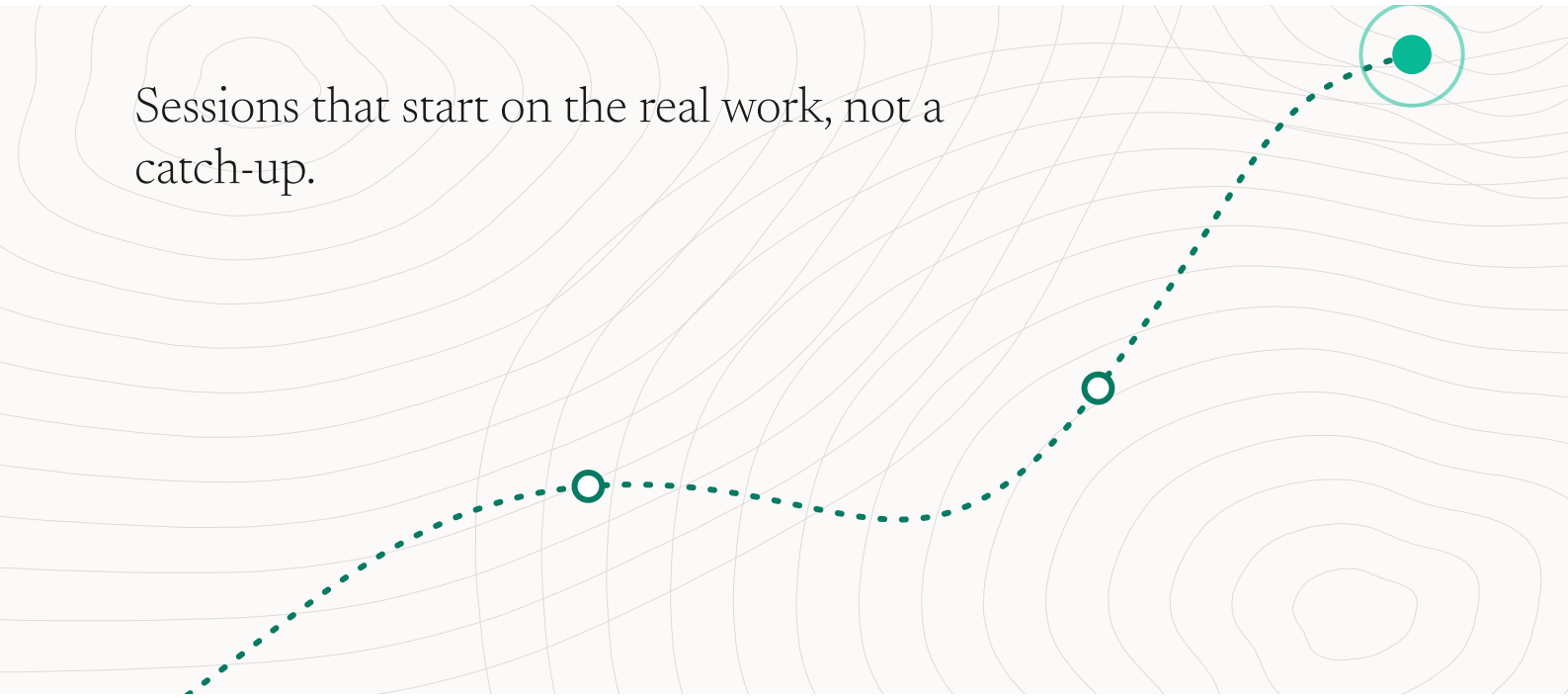
Not sure? Send them the fit check.

Five quick questions. AJ tells them whether Clearahead fits their team and how it would help.

clearahead.ai/fit

Not a fit: one-to-one coaching on personal goals, or a client looking for a task tracker.

Sessions that start on the real work, not a catch-up.



02

Send them a note.

Swap in your link and code from your approval email, and make it your own. We suggest keeping the last line: clients trust a recommendation more when you're open about it.

Subject: Keeping our plan moving between sessions

Hi {first name},

Before our next session, I'd like us to try Clearahead. It's where we'll keep the goal we agree, what's in the way of it and the moves your team commits to.

Your team updates it in a sentence when the work moves. AJ, the AI inside it, keeps the plan current and writes a short brief every Monday, so our sessions start on the real work, not a catch-up.

It's free for up to three people, and I join as a Viewer, so I don't take one of your places. If you upgrade later, my code {YOUR CODE} takes 30% off your first month.

Start here: {your referral link}

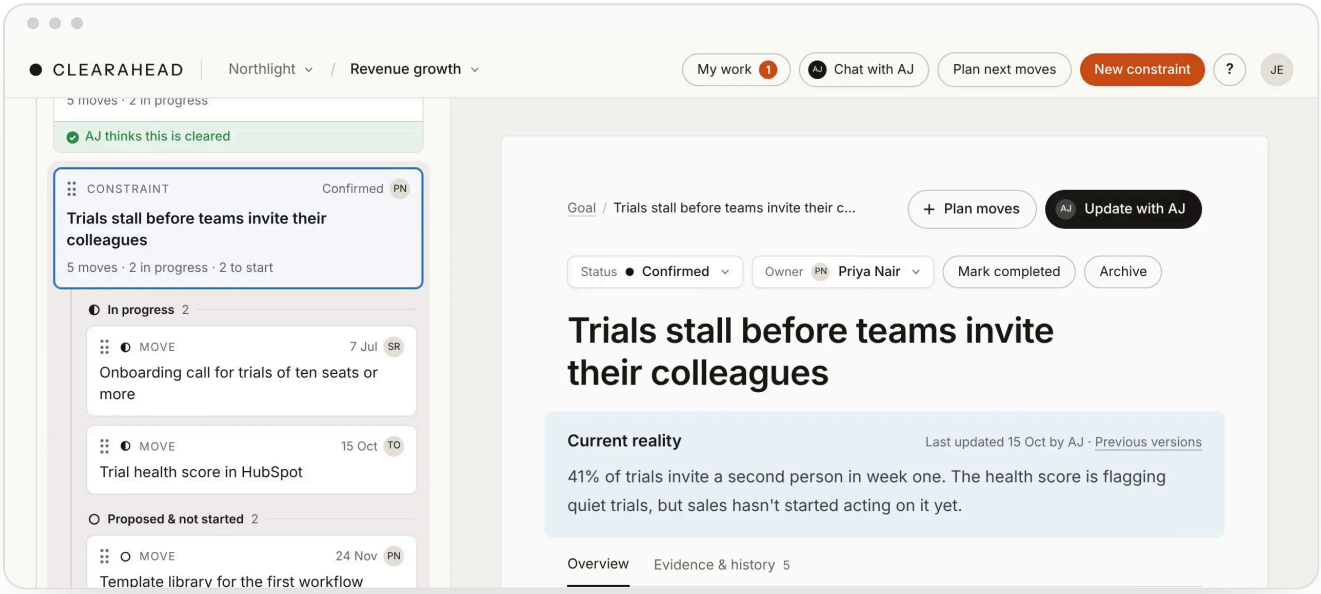
Full disclosure: I'm a Clearahead partner, so I earn a share if you subscribe.

{your name}

03

Run their planning session in it.

A 90-minute agenda for a goal-setting or annual planning session, with the client's Clearahead on the screen. Most teams set the goal and their first constraint in one session.



By the end of the session: the top constraint open, with the first moves, each with an owner and a due date.

Before

The client sets up.

They start the free plan at clearahead.ai, name their organisation and first workspace, and invite you as a Viewer or Contributor. No card needed.

0–20 min

Set the goal.

The founder tells AJ the goal in a sentence. AJ asks the questions that sharpen it: why it matters, why they believe it and how they'll know it's done. You steer the conversation. AJ writes it up.

20–50 min

Find what's in the way.

Ask AJ what's holding the goal back. Aim for three to five constraints, then agree as a team the order to tackle them.

50–75 min

Plan the first moves.

Open the top constraint and use Plan moves. AJ suggests the moves most likely to clear it. The team picks the ones they'll do, each with an owner and a due date.

75–90 min

Bring the team in.

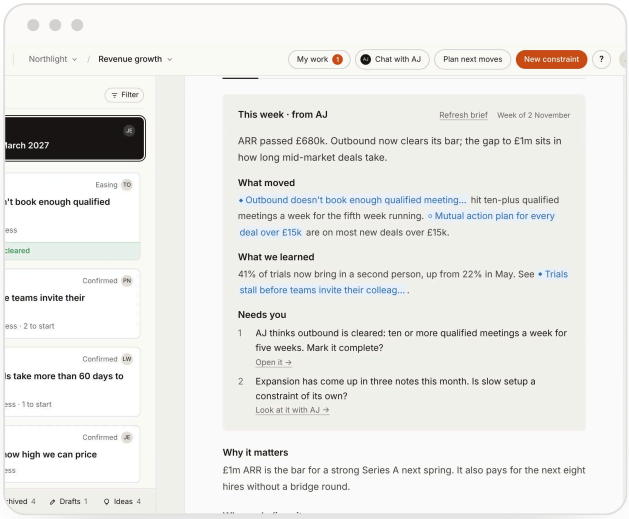
Invite the people who own constraints and moves as Contributors. Agree that they update in a sentence when the work moves, and when you'll meet next.

04

Plan their rhythm.

The cadence planner asks eight questions about how the client runs today. It suggests which workspaces to set up, who holds which role and a weekly rhythm, alongside EOS, OKRs or your own framework, or as a fresh start. Do it together at the end of the session, or send them the link.

clearahead.ai/docs/cadence-planner



This week from AJ, written every Monday.

05

Before every session.

1. **Open the client.** Switch to their organisation from the header. One login covers every client, each kept entirely separate.
2. **Read This week from AJ.** What moved, what the team learned and what needs the founder, written every Monday.
3. **Refresh it on the way in.** Refresh the brief just before the session to pick up the latest.

THREE QUESTIONS TO OPEN WITH

"What's happened that isn't in here yet?"

"Which of the calls under "Needs you" can we make today?"

"Is the top constraint still the one most in the way?"

06

Your terms, in short.

25%	30%	£0
of every payment, for life	off a client's first month	for your seat in every client

25% for life

Of every payment each client you refer makes, excluding VAT, for as long as they stay on a paid plan.

30% off for them

Your code takes 30% off a client's first month, so they have a reason to use it.

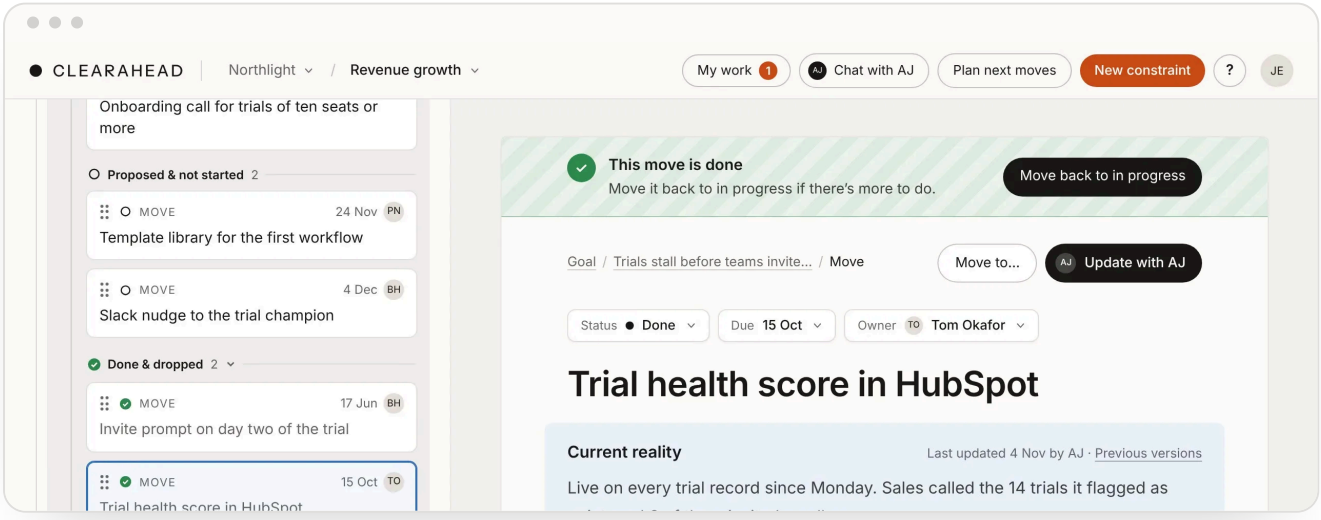
Paid monthly

Held 30 days in case of a refund, then paid by Wise or PayPal once you're owed £50 or more.

Your seat is free

As a Viewer you never count towards a client's three free places. Join as many clients as you work with, from one login.

The full terms are at clearahead.ai/affiliates/terms.



Between sessions, your client's team updates in a sentence and AJ keeps the plan current.

CLEARAHEAD

Keep your clients moving between sessions.

See it and apply	**clearahead.ai/advisers**
The affiliate programme	**clearahead.ai/affiliates**
The fit check	**clearahead.ai/fit**
The cadence planner	**clearahead.ai/docs/cadence-planner**
Questions about a client	**hello@clearahead.ai**