

Cash Flow Coaching Kit Logo

[Narrator] - Change Lever Coaching Tips.

Peter Knight. Director, Knight Partners.

[Peter Knight] - The way we use these cards with clients, is following the Canvas.

We've identified which area of the business we need to focus on.

So we pull out the appropriate card and work our way through it with the client.

We use their Canvas first.

That highlights the area that we need to work on.

The cards focus on a whole range of different areas and it would be overwhelming if you just worked your way through and just started talking about everything.

So it's on the cards.

It's important to make sure that by going through the Canvas you pick the relevant point that you want to work through and then the card, the Change Lever card just takes you through the right points to raise with them.

[Narrator] - Debra Anderson. Director, Anderson Tax.

[Debra Anderson] - My favorite part about the Cash Flow Coaching Kit is actually these Lever cards.

The thing I love about the Lever cards is, they start a conversation with clients.

So they might be questions that are seemingly really obvious.

But when they're actually written down, they're not coming from me, they're coming from a card.

And so therefore I can actually go through with them and ask some of those questions.

And they might be things that I don't think are even relevant, but then when I go through it the client goes, oh actually I've got that situation.

So it's things I haven't thought about or things they haven't thought about.

[Narrator] - David Simmons. Chartered Accountant.

[David Simmons] - Using the Change Lever cards with my clients, I think that it's useful to be able to provide copies to the client.

And you may choose to do that during the meeting or possibly give it to them after the meeting so they can take it away as a reminder as to the things to focus on.

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