Cash Flow Coaching Kit Logo

[Narrator] - Action Checklist coaching tips.

Debra Anderson. Director, Anderson Tax.

[Debra Anderson] - I use the Action Checklist throughout the entire process.

So I have it sitting there right throughout and as we go through areas I put little notes in there for them and then I ask them, "How can I make you accountable for this?

What are the actions that you're going to take and what time frame are we going to put on that as well?"

You know, we're dealing with it as we go rather than just dealing with it at the end.

[Narrator] - Dale Feim. Founding Director, Dalcorp Accounting Services.

[Dale Feim] - Some of the tips we would give others using the Action Checklist is, first keep it simple, keep it achievable, but also enable it to be something that you can hold the client accountable for.

It's all too often you can have these discussions with clients and they'll leave the appointment and they've forgotten about it or they're not motivated about doing anything or taking any action.

It's a two-way street.

You've got to put things on that Action Checklist that you know the client is able to achieve, is motivated and excited about achieving, so that you can hold them accountable for it and actually get some change.

If you make these things too difficult or some of the action points are too hard to achieve, the client will leave, lose interest, and then feel disheartened about the whole process.

[Narrator] - Peter Knight. Director, Knight partners.

[Peter Knight] - If you're using the Action Checklist for the first time, I think my biggest tip would be don't get too carried away.

Keep the number of actions you'd be agreeing with your client maybe to three or four, maximum six.

No more than six.

Temptation would be that we come up with this whole list of things, 20 or 30 things.

It'll be too much.

The client won't do it.