- [Instructor] Welcome to the Cash Flow Coaching Kit.

Let's take a few minutes to show you around.

Starting a coaching session with your client is simple, just enter their business name.

The Kit has an in-built coaching model, which allows you to discover more about your client, unpack their financials, and explore potential improvements, so you end up with a strong action plan.

The Kit answers Four Key Questions that are vital to improving cash flow:

One, am I trading profitably?

Two, have I put enough aside to meet my regular financial commitments?

Three, does my business have enough to spend on myself and pay others?

And four, is my business improving its financial position?

The Kit is designed to give you quick access to each tool during conversations with your client.

You can access tools from the home page or the tool navigation bar.

Each tool has its own set of tips, and you'll find demonstrations

in the Show Me How video tutorials.

You can find the help you need under the Help feature on every page.

If you need more help with the Kit, you can post a question or comment to one of our friendly Cash Flow Coaching Kit professionals.

The Client List stores all your coaching sessions, and has coaching tips from professional advisors to help you in your coaching conversations.

It's all about the coaching conversation, so you pick the tools that best suit your client.

The Health Check is a great starting point. You can get to know your client and zero in on the areas they want guidance on and support those needs during your conversation.

The Health Check results page highlights the Four Key Questions so you can explore these further with the Cash Flow Canvas.

The results page also links to the Discover Topics, which help your client understand cash flow fundamentals and start to create action items using the Task Builder.

The Cash Flow Canvas can be completed manually or you can import data from various accounting systems.

The Canvas is a powerful visual and conversational tool that helps your client better understand their cash flow.

The Change Levers offer potential business improvements and considerations.

Select the relevant Change Levers with your client

and test those scenarios back in the Canvas.

The Action Checklist keeps a record of all the actions you discussed

with your client during your coaching conversation.

You can add actions and tasks from the Discover Topics Task Builder or the Change Levers, and tailor each one to suit your client.

You can share all the tools separately with your client.

You can also create a session file of all the activities from the coaching conversation to reinforce the session outcomes with your client.

For optimum viewing, we recommend using Google Chrome browser

with a screen resolution of 1920 by 1080 or greater.