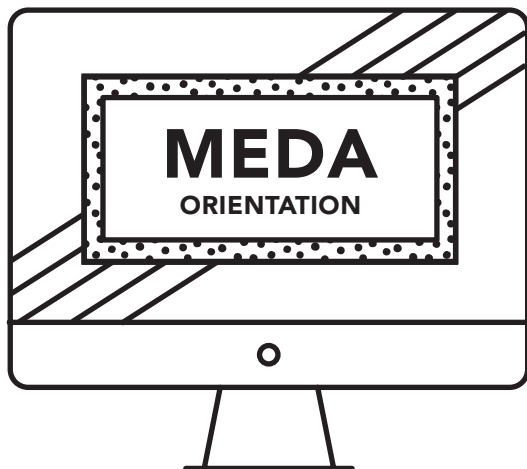


# Guide to the Viva Toolkit

## TOOLKIT OVERVIEW

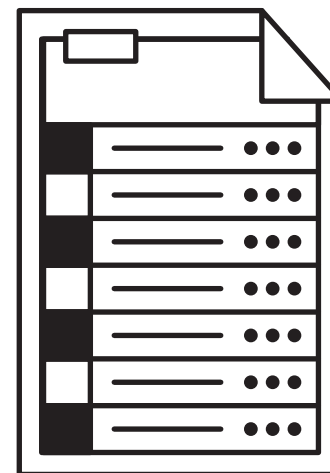
### — INTRODUCTORY ORIENTATION DECK



This deck will serve as the backbone of your orientation. We've designed this presentation to engage and educate your clients, as well as guide you through the tools provided in the kit.

You'll find speaker notes, instructions, and timing suggestions in the speaker notes for each slide of the powerpoint presentation.

### — FINANCIAL ASSESSMENT



This assessment will help you and your client reflect on their current practices and quickly get an idea of where they're starting from. The goal over time is to get items in the "Not yet" and "Kind of" columns over to the "Yes" column.

## TOOLKIT OVERVIEW

### — “START YOUR JOURNEY” HANDOUT



#### **Section 1: “My future”**

Encourage your client to shed the burdens of today and take a moment to reflect on their goals and aspirations for the future. Make sure they write down their thoughts.

#### **Section 2: “My present”**

Based on where your client wants to be and what they want to accomplish in the future, have them reflect on their current situation. What is the current state? and how does it relate to the future goals? What’s helping? What might be detracting?

#### **Section 3: “My journey”**

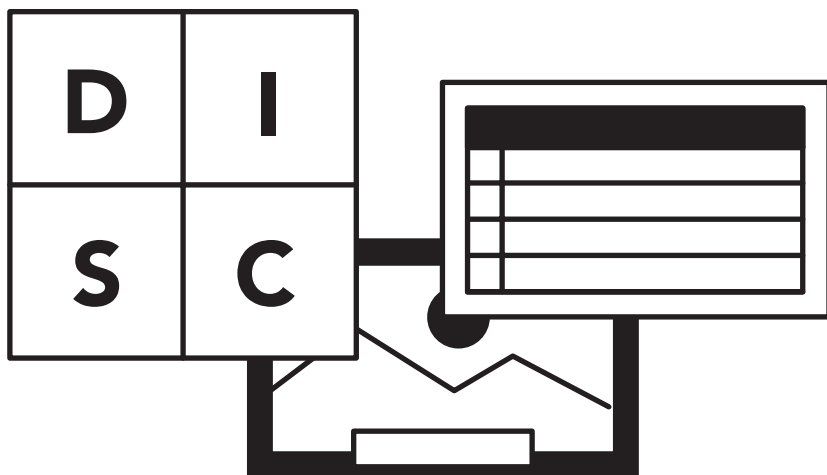
Help your client think about what they need to achieve in order to get from point A to B. What are the milestones? What do you need to be doing? Your role is not to tell them what to do, but to help them come up with their own ideas.

#### **Section 4: “My commitments”.**

Everyone has things they know they should stop doing (bad habits), what they should start doing (know they should but haven’t done yet), and of course everyone has something that they are doing well already and should continue doing. Have everyone reflect and write down their Start, Stop, Continue commitments.

## TOOLKIT OVERVIEW

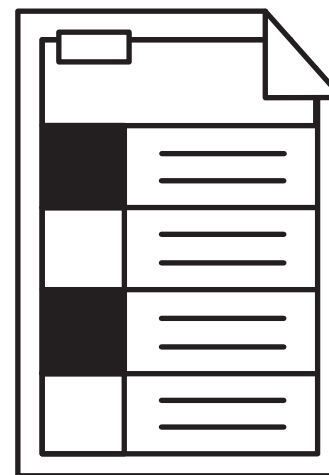
### — ASPIRATION CARDS + SPINNER



The aspiration cards are a way to anchor various life goals to DISC. The back of each card has quick facts or things to consider around how each component of DISC relates to the life aspiration.

The spinner is a great way to help engage a group or individual. If you're not sure which letter to start with or talk about, have the client spin the spinner. If it lands on S, then talk about Savings as it relates to their goals, and then move on to other letters.

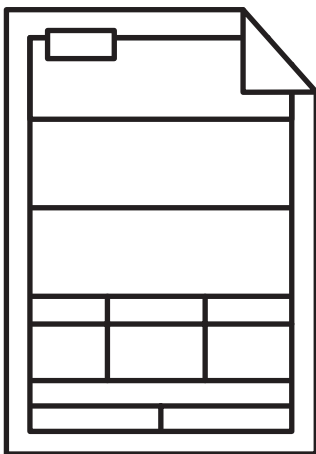
### — CHECKLIST



The checklist is a great starting point for anyone trying to improve their status in debt, income, savings, or credit. This checklist is both a resource for you the coach, as well as a way for clients to have discrete and actionable next steps to pursue. We've heard that clients often like putting this checklist on their fridge or somewhere else visible at home to remind them of what they should work on next.

## TOOLKIT OVERVIEW

### ACTION PLAN



It's important for clients to walk away from a 1:1 session with concrete and actionable next steps. Use the action plan sheet towards the end of your session to reiterate their aspirational goal and then more specifically articulate a financial goal they are trying to achieve. Remember, goals should be SMART (specific, ...etc). Be sure to have the client and yourself sign the sheet as a way of promising commitment, and if you can, schedule a follow-up session.

## FIRST ORIENTATION

### TIME

The orientation should take between **60-90 minutes**. This will vary depending on size of the group, time taken for discussion, and and Q&A.

### TOOLS & MATERIALS NEEDED

#### Introductory Orientation Deck

This deck will serve as the backbone of your orientation. We've designed this presentation to engage and educate your clients, as well as guide you through the tools provided in the kit.

#### Financial Assessment (printed for each attendee)

Start by helping your clients assess their own financial habits.

#### "Start Your Journey" Handout (printed for each attendee)

Encourage your clients to reflect on their life goals and to evaluate how those goals relate to their financial health.

#### Aspiration Cards and Spinner (one set of cards and the gameboard)

Use these tools to direct the conversation around DISC.

## FIRST ORIENTATION

### — TOOLS & MATERIALS NEEDED CONT.

#### **Checklist (printed for each attendee)**

The checklist will serve as a tangible starting point for your clients.

#### **Pens**

For each attendee to use during the orientation activities.

#### **Folders**

We recommend that the Financial Assessment, “Start Your Journey” Handout, and Checklist be given to clients in a folder they can take home with them. You may also include any other materials specific to your organization in the folder. A folder for safekeeping encourages clients to keep the materials and bring the materials back in subsequent coaching sessions.

### — THE EXPERIENCE

You will find speaker notes, instructions, and timing suggestions in the speaker notes in each slide of the powerpoint presentation, or “Introductory Orientation Deck”.

#### **Introductions**

Introduce yourself and welcome your guests! Ask everyone to introduce themselves, and share their answer to the question, “if you have \$1million what would you do with it?”

#### **“Start Your Journey” Handout**

##### **Section 1: “My future”**

Encourage your clients to shed the burdens of today and take a moment to reflect on their goals and aspirations for the future. Make sure they write down their thoughts, and let them know that this is not something they will have to share with the group.

#### **“Start Your Journey” Handout**

##### **Section 2: “My present”**

Based on where they want to be and what they want to accomplish in the future, have your clients reflect on their current situation. What is the current state, and how does it relate to the future goals?

#### **Share**

Ask the group if anyone is willing to share some of the things they’ve written. This is not mandatory, and nobody should be forced to share if they do not wish to.

#### **Introduction to DISC**

In order to get from point A (My present) to B (My future), it’s important to understand some financial basics. The slides will give you the information you need.

## FIRST ORIENTATION

### THE EXPERIENCE CONT.

#### **Aspiration Cards and Spinner**

Use the game board as a way to engage the group to talk further about debt, income, savings, and credit. Based on some of the goals you hear from the group, choose cards that feel appropriate for the group. Pass out the cards, and ask if there are any that people would like to talk about. After spinning the wheel, you can talk about how DISC relates to the various life events by first asking the group to read outloud what's on the back of the card.

#### **Financial Assessment.**

After sharing and discussion the financial basics, have everyone fill out the Financial Assessment worksheet.

#### **"Start Your Journey" Handout**

##### **Section 3: "My journey"**

Have everyone think about what they need to achieve in order to get from point A to B. What are the milestones? What do you need to be doing?

#### **"Start Your Journey" Handout**

##### **Section 4: "My commitments"**

Everyone has things they know they should stop doing (bad habits), what they should start doing (know they should but haven't done yet), and of course everyone has something that they are doing well already and should continue doing. Have everyone reflect and write down their Start, Stop, Continue commitments.

#### **Conclusion**

Thank everyone for attending and encourage further next steps with your organization.

## FIRST 1:1 - WITH ORIENTATION

Now that client is familiar with the subject, the tools below serve to build upon their existing knowledge.

### TOOLS & MATERIALS NEEDED

Ask the client to bring back all of the tools that they received during their orientation and review them together:

**Financial Assessment**  
**"Start Your Journey" Handout**  
**Checklist**

Tools needed:

**Aspiration Cards and Spinner**  
Use these to direct the conversation and to cover areas of interest that may have been missed during the orientation.

**Action Plan**  
Ensure your client leaves the meeting with actionable items that they can complete in the short-term.

## FIRST 1:1 - WITHOUT ORIENTATION

### TOOLS & MATERIALS NEEDED

**Financial Assessment**  
Start by helping your clients assess their own financial habits.

**"Start Your Journey" Handout**  
Encourage your clients to reflect on their life goals and to evaluate how those goals relate to their financial health.

**Aspiration Cards and Spinner**  
Use these tools to direct the conversation around DISC.

**Checklist**  
Towards the end of the orientation, pass out the checklist. This will serve as a tangible starting point for your clients.

**Action Plan**  
Ensure your client leaves the meeting with actionable items that they can complete in the short-term.



## FIRST 1:1 - WITH ORIENTATION

### — TOOLS & MATERIALS NEEDED

Ask the client to bring back all of the tools that they received during their orientation or prior 1:1 and review them together:

**Financial Assessment**

**"Start Your Journey" Handout**

**Checklist**

**Action Plan**

Tools needed:

**Action Plan**

Bring a fresh Action Plan and set new goals each session.