

ProfitMancer

MONEY MASTERY

**Certification - Goals
on the Move:
Adjust or Bust!**

TRANSCRIPT

Introduction

Welcome, esteemed coaches and consultants, to our specialized training session designed to empower you with the tools and insights needed to guide your clients through the "Goals on the Move: Adjust or Bust!" module of the Money Mastery program. This session is pivotal, as it focuses on the dynamic nature of goal setting and the importance of flexibility, monitoring, and adjustment in achieving financial success. Let's dive in.

"Goals on the Move: Adjust or Bust!" isn't just about setting goals; it's about staying in motion towards them, adapting as necessary. It's crucial to communicate to your clients that while setting SMART goals lays a foundation, the real magic happens in the journey — a journey that requires vigilance, adaptability, and resilience.

Tying Into Mindset and Goals

Emphasize to your clients that their mindset is the bedrock of their financial journey. A growth-oriented mindset sees challenges as opportunities, setbacks as learning moments, and understands the power of adjustment. This stage of the program is designed to foster this mindset, reinforcing that goal attainment is a fluid process, not a fixed destination.

1:1 Coaching Tips

- **Personalized Monitoring Plans:** Work with your client to establish personalized metrics and review frequencies that resonate with their specific goals. This customization makes monitoring feel less like a chore and more like a tailored strategy for success.
- **Deep Dives into Adjustments:** Use 1:1 sessions to explore the nuances of necessary adjustments in detail. This is an opportunity to delve into the "why" behind deviations from the plan, fostering a deeper understanding and commitment to the adjusted course.

- **Celebrate the Wins:** Make it a point to celebrate every bit of progress, no matter how small. Personal recognition can significantly boost morale and motivation in a 1:1 setting.

Group Coaching Tips

- **Collaborative Goal Reviews:** Encourage group members to share their progress and adjustments. This not only fosters a supportive community but also provides diverse insights into problem-solving and goal adaptation.
- **Group Accountability:** Leverage the power of group dynamics for accountability. Setting up accountability pairs or small groups within your larger cohort can drive motivation and encourage regular monitoring and adjustments.
- **Interactive Workshops:** Host workshops where clients can work on their monitoring and adjustment plans in real-time, providing immediate feedback and suggestions. This interactive approach keeps engagement high and learning active.

Stressing the Importance of Action and Monitoring

Communicate to your clients that action without monitoring is like shooting arrows in the dark. The real value comes from seeing where the arrow lands and adjusting your aim accordingly. This continuous cycle of action, review, and adjustment not only fine-tunes their approach but also keeps them aligned with their evolving financial landscape.

Maintaining Motivation Through Plan B

Highlight the importance of having a back-up plan where appropriate. When clients encounter obstacles, knowing they have a Plan B ready can significantly cushion the blow of disappointment. It's not just about bouncing back; it's about bouncing forward. Encourage them to view every setback as a setup for a comeback, which is essential for maintaining motivation and momentum.

If you're working with them in real-time on their planning or reviewing their completed worksheet, you'll want to ask probing questions to help them see potential failure points. Once these are identified, ask them what alternative paths can be taken if the original plan doesn't work out. To be clear: this is not to discourage them but to empower them.

Examples of Plan B

Here are a few examples where a Plan B might be warranted:

1. **Outdoor Event** - They may be planning an outdoor event at a venue that isn't impervious to the weather.
2. **Online Launch** - Many things can go wrong with an online launch. One of them is not having a backup merchant account available if something happens to the primary one.
3. **Hiring Fail** - They may decide to hire a key new team member as part of their goals. What can they get in place in case that hire doesn't work out?

As you can quickly see, sometimes with looking at Plan B's, we'll see that there are actions needed to be part of our core action plan to ensure our success.

Conclusion

Utilizing the "Goals on the Move: Adjust or Bust!" content effectively requires a balance of structure and flexibility. Whether you're working with clients 1:1 or in groups, the key is to tailor the approach to fit their unique needs while maintaining the core principles of continuous monitoring, adjustment, and resilience. Remember, you are not just their coach or consultant; you are their co-navigator on this journey of financial mastery. Equip them with the tools, mindset, and strategies to not only reach their goals but to thrive beyond them.