

Start Here

## CLIENT CONVERSATION

Use the **Elevation Sequence** to guide the discussion.



The Compass



Clear The Noise



The Explorer



The Crowbar



Mirror Moment



Nudge Pact



Economic Echo



Anchor Accolade



### F FIND

#### The Burning Issue

Identify the real problem

Education

Cash Flow

Profitability

Debt

Operations

The Future

### I IDENTIFY

#### The Fuel Source

Use the right diagnostic tool

#### Education

- Home Run Financial System
- Financial Doctor

#### Cash Flow

- Mining Your Business for Hidden Cash
- The Fast Money Formula

#### Profitability

- Mining Your Business for Hidden Cash
- Financial Doctor

#### Debt

- Home Run Financial System
- Debt Optimizer

#### Operations

- Process Optimization
- Operations Dashboard

#### The Future

- Start With The End In Mind
- Forecasting By The Numbers
- Simple Valuation Formula

### X EXECUTE

#### At The Flash Point

Assign tactical tools & next actions

#### Tactical Tools (By Issue)

##### Cash Flow

- 13-Week Cash Runway
- Inventory Master

##### Debt

- Loan Proposal Gen
- Debt Optimizer

##### Operations

- Fixed Asset Manager
- Risk Assessment

##### Profitability

- Pricing Center
- Cust/Prod Profitability
- Mini P&L
- Costing Analysis
- Costing & Bid Calc
- Bid History & Analytics

##### The Future

- Report Generator
- Start With The End In Mind

#### Execution & Homework

- 30/60/90 Day Action Planner
- Report Generator
- Tactical Tool Assignment
- Next Meeting Action Plan

#### OUTCOME:

A clear client action plan (not just advice).  
Bite sized action items.

RESULT A repeatable advisory workflow:

F. → I. → X.

Built For THAT Moment™