



Creating a Plan Worksheet

So you've got engagement, you've explored and helped FOCUS the conversation on their values and goals-now it's time to make a plan and move forward. Read each client statement and circle the strategy that would be most useful in planning, then write your response.

- 1.) CLIENT: "Yeah, that's exactly what I want. To be financially secure, to not have to worry about money and to be able to give freely to those I care about through charitable donations or through having fun. That's the financial security I seek and that's what I want in my future."

Planning Strategies:

- Evocative Question
- Strategic Affirmation
- Strengthen Commitment talk
- Identify next steps

Response:

- 2.) CLIENT: "I struggle with making changes, but this is something I need to do. My family needs more security and stability and yes-I want to be the provider that they look up at me for. I'm just not sure where to go next."



Planning Strategies:

- Evocative Question
- Strategic Affirmation
- Strengthen Commitment talk
- Identify next steps

Response:

3.) CLIENT: “I really want to eat healthier. I want to, because I want to enjoy life not just get through it. I want to be able to run and play with the grandkids, and keep up with their active lifestyle. My mom had diabetes and it changed her-she could never keep up with the family lifestyle. I’ve gotten my diabetes under control before, I can do it again.”

Planning Strategies:

- Evocative Question
- Strategic Affirmation
- Strengthen Commitment talk
- Identify next steps

Response: