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Coaching: A Framework for Unlocking Client Potential

The GROW model is a four-step framework for better advice conversations with clients and prospects. You can use it to help them identify, and execute on, the kind of changes that can lead to better financial results and greater satisfaction with you. It's important to remember, the client or prospect should be doing the talking.



For best results shoot for an 80/20 listening-to-talking ratio where you're listening about 80% of the time.

G

Goal

Work with the client to choose a goal or outcome.

R

Reality

Develop a better understanding of their current state.

O

Options

Explore ideas for achieving goals, including overcoming obstacles to success.

W

Will

The client chooses, and commits to, taking specific actions moving forward.

G What is the specific outcome you want to accomplish in [this meeting/ quarter/six months/year]? (Select the appropriate time frame)

Why is this goal important to you? How does it align with the larger context of your life? _____

How will you know when you have achieved your goal?

Imagine you have accomplished your goal. How do you want to feel? How is your life different? _____

R On a scale of 1 to 10 where 10 is your ideal situation [goal achieved], what number are you now? _____

What would a [insert next number on the scale] look like?

What could you do to get from [your current number] to [the next number]?

What steps have you taken so far to achieve your goal, either successfully or unsuccessfully? _____

O What roadblocks or challenges are you facing right now—financial, investment, or otherwise? _____

What are some potential strategies or solutions for achieving your goal, including the advantages and disadvantages of each?

What resources are available to you to help you accomplish your goal?

W What are the specific steps you're going to take to achieve this goal?

What roadblocks may get in your way? How do you plan on addressing them?

On a scale of 1 to 10 where 10 is fully committed, how committed are you to taking action? _____

How will you keep yourself—and how can I keep you—motivated?

Finishing Strong Consider wrapping up conversations with clients by asking, “What did you learn in this session?” To help them realize and affirm the progress they’ve made. Build on that momentum by confirming next steps—which can inform future meetings.

Action Steps	By When?	Roadblocks and Resources (things that can get in the way of achieving the action step, and things that can help)	Notes

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