Stage 2
Action Plan

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Our walkthrough videos and step-by-step articles show you how to easily navigate each stage of the hubbix process, and demonstrate how to get the best out of the platform. [Watch video]

In this simple guide, we'll be showing you how to move around the Action Plan screen, reorder, edit or delete an action, and turn the actions into a tangible action plan that is tailored to your client's every need. Sound good? Let's begin:

On the ***Profile*** page click on ***Action Plans*** in the menu on the left of the screen. This is where Hubbix keeps all the actions created using the Strategy Builder during your client session.

1. **Move an action up/down the list –**
   The best way to get started is to make sure the actions are in the appropriate order for your client. The actions automatically appear in the order you selected when adding the client in Stage 1 - Priority, Custom or System order. Whatever option you pick, you can still reorder the actions as much as you like.

   Priority Order: The actions that appear first are either the most important to achieving the client's primary goal (the one you selected when adding a new client), or they are time sensitive.

   Custom and System Orders: hubbix will automatically place the actions in the order that they were created throughout the client session.

   You can change the order of the actions using the arrows in the top right corner of each action box.

2. **Edit or delete an action –**
   You can change, remove or add any information to an action.

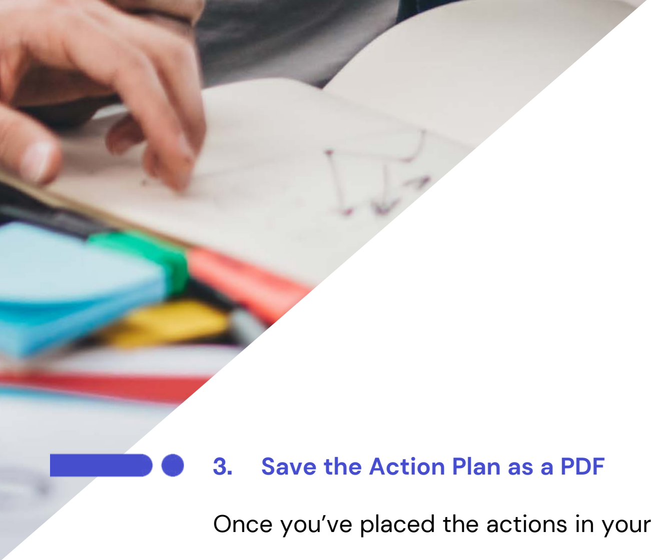
   - Click on the ***Edit*** button under the action, make any necessary changes and click ***Save***.

   - You can also ***delete*** an action entirely.

   - Click the ***Delete*** button, next to the ***Edit*** button.

     hubbix will check to see if you really do want to delete the action, just to make sure it wasn't an accident.

   - Click ***Delete*** again to permanently remove the action or click ***Cancel*** if you want to keep it.



3. Save the Action Plan as a PDF

Once you've placed the actions in your preferred order, click on ***Print*** in the top right of the page.

This will take you to the ***Action Plan***: a PDF document that you can download and save as a PDF file to send to your client. Your company logo will appear on the first page of each plan.

Scroll down to the next page and you'll find some information about the ***Action Plan***, then scroll down again to the actions you're sending to your client, in the order you wanted.

The actions are separated into 3 different sections:

Section 1: High-Risk Actions - the actions that are of the highest priority, or perhaps most time-sensitive.

Section 2: Your Goal Actions - actions directly related to the primary goal in the optimum order to achieve it.

Section 3: Other - the remaining actions that don't fall into the other 2 sections.

You can now save this ***Action Plan*** as a PDF document and send it to your client to work through each action, until your next session.

4. Start all future sessions in the Action Plan screen -

We recommend that you begin all future sessions with the same client in the ***Action Plan*** screen. This enables you to check their progress through the list of actions since the previous session.

So, before you begin asking the next set of questions in the ***Strategy Builder***, head to the ***Action Plan*** screen and ask the client if they have completed the first action from the previous session.

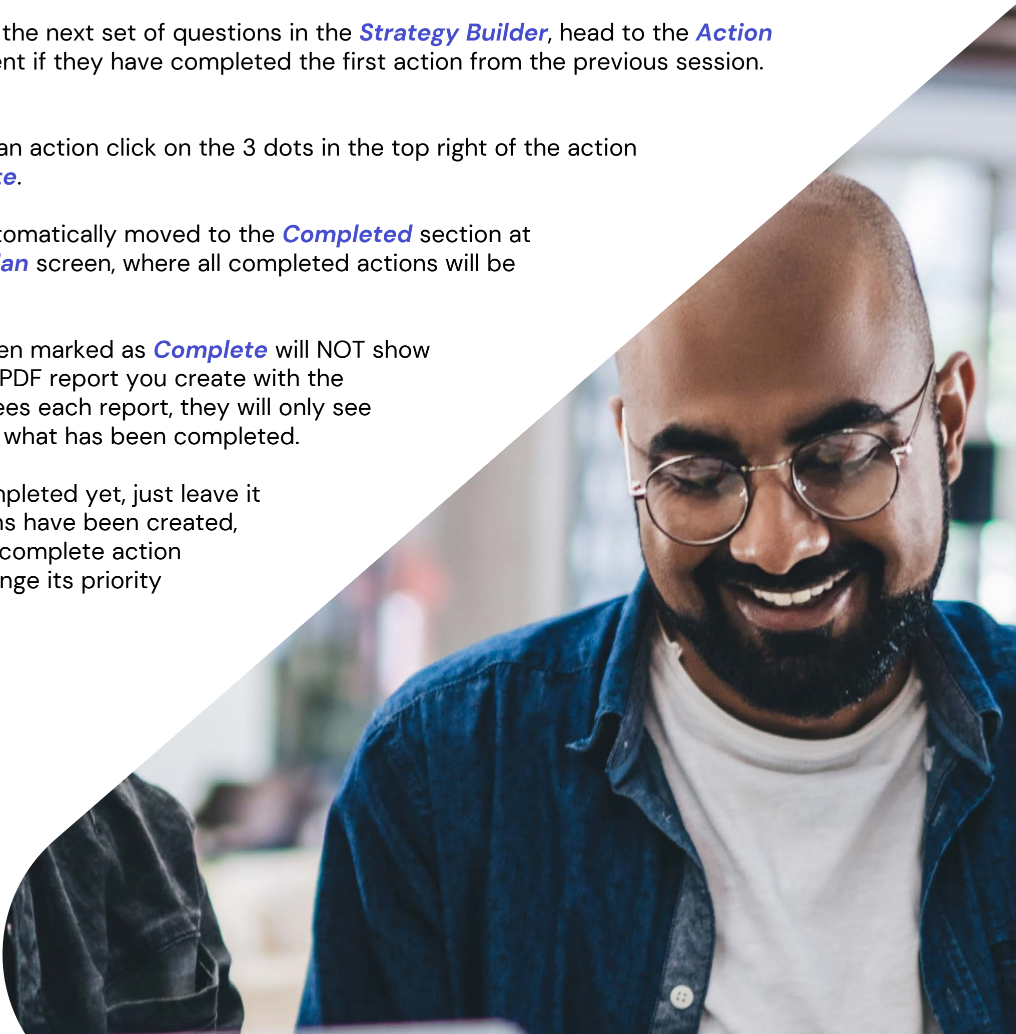
5. *Complete an action -*

If the client has completed an action click on the 3 dots in the top right of the action box and mark it as ***Complete***.

The completed action is automatically moved to the ***Completed*** section at the bottom of the ***Action Plan*** screen, where all completed actions will be stored.

All the actions that have been marked as ***Complete*** will NOT show up on the next ***Action Plan*** PDF report you create with the client. So, when the client sees each report, they will only see what needs to be done, not what has been completed.

If an action hasn't been completed yet, just leave it where it is. Once new actions have been created, you can always move the incomplete action up or down the page to change its priority status.



6. **Add a Custom Action**
A lot of clients like to begin each session with an information dump: their wins, losses, challenges, etc. As the business adviser, you might need to create new actions, based on what they're telling you.

Add an action to the list directly from the ***Action Plan*** screen:

Click the ***Add Custom Action*** button, in the top right of the screen.

This enables you to record those actions as you go, so you can keep track of them.

7. **Continue with the Strategy Builder**
Once you have marked the completed actions from the previous session and created any custom actions from the beginning of the new session, go to the top centre of the page and click on the ***Strategy Builder*** button to start asking the next set of questions and generating more actions.

Action Plan
FAQs

What if I want to add information to an action?

That's easy, just click on *Edit* and enter the new information. Just click Save when you're done.

How do I make sure the most important tasks are completed first?

If you chose ***Priority Order*** then hubbix will automatically arrange the tasks from most to least important on the ***Action Plan***.

What if I want my client to complete the actions in a different order than hubbix suggests?

Just use the arrows in the top right corner of each Action to move it up or down the priority list.

Why should I start each future session in the Action Plan screen instead of the Strategy Builder?

So that you can check with your client to see which of the actions assigned in the previous session have been completed and which of them haven't. This process often exposes any difficulties the client might be having or exposes any further vulnerabilities or knowledge gaps.

How to Integrate Hubbix into Your Service Offering.

hubbix is a professional tool for business coaches and advisers designed to endorse and enhance your services.

hubbix

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