Stage 1B
The Strategy Builder

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In this guide, we'll show you how to use the Strategy Builder: how the questions are laid out, and - most importantly, how to enter the clients' answers into the system.
[Watch the Video]

Start On The Stategy Builder Screen.

There are typically 5 types of responses you can give when using the Strategy Builder, covering every possible answer for each question:

1. **Answer: Not required**

   - The first response you can receive from a client is that it's just not relevant to their company or industry: If you click ***Not Required*** that question will be removed from the set and then you can move onto the next question.

2. **Answer: Yes/No**
   Sometimes the answer requires a simple **Yes** or **No** answer, without the need for further detail.

3. **Answer: Open-ended question**
   Sometimes the client responds with a more detailed answer, which means you'll need to record the information being provided:

   - Type the necessary information into the ***Answer*** box, which appears directly below the question.
   - The ***Notes*** box at the bottom of the page is used for your personal notes. Anything recorded here will only be visible to you and not to your client.

4. **Answer: To be determined**
   If the client doesn't know or is unsure of the answer to a question:

   This refers to an ***action*** that you've given that is not directly related to the question being shown on screen at the time. You will want to record and turn into an Action for their ***Action Plan*** by using the custom action button:

5. **Answer: Add custom action**
   This refers to an ***action*** that you've given that is not directly related to the question being shown on screen at the time. You will want to record it on their Action Plan by using the custom ***action button***:

- Click on the ***Add Custom Action*** button.
  - When the ***Action*** box pops up on the screen:
  - Enter the ***Action*** you want the client to perform,
  - Select a ***Section*** you wish to file the action in,
  - Select a ***Subsection*** and a ***Sub-Subsection*** so the action is then filed in the appropriate place (whatever suits you the best).

Using The
Strategy Builder– FAQs

Can I Add My Own Actions?

You can add your own actions based on advice you give to the client. Just click on the ***Add Custom Action*** button at any point.

Can I Go Into More Detail Than Just ‘Yes’ Or ‘No’?

You can enter as much information as you like into the ***Answer*** box, or in the ***Notes*** box at the bottom – which is only visible to you.

What Do I Do If I’m Not Sure What Section, Subsection Or Sub-Subsection To File An Action In?

It really doesn’t matter too much if you don’t select the perfect options here, just choose the options that make the most sense to you. It’s not an exact science, it’s about personal preference.

What Should I Do If I Want To Go Back To A Previous Question?

Simply click on the ***Previous*** button in the top left corner of the screen.

Where Can I See All The Actions That Have Been Generated From The Questions Or Created By Me?

They will appear in the Action Plan in the order they were created. All this will be covered in **Stage 2: Navigating the Action Plan.**

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.

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