Best Practices for the Practice Boomers Mastermind Report

The Mastermind Report is designed to better aid coaches in tracking and summarizing the content of the Mastermind session they facilitate. It also generates a ready-to-distribute PDF that can be distributed to the firm. Each firm has its own, unique URL that leads to the page in which data for a Mastermind will be entered. Once Jordan has provided the URL for the firm(s) you facilitate, follow these steps to fill out the Report:

Access your firm's worksheet by clicking on the link provided to you or copying and pasting it into your search bar. **You must be logged into your Practice Boomers account before accessing the link since the worksheet is contained "behind" the gate of the website.**

For each Mastermind you will need to change the date of the session, summary, participant notes and action steps, lesson assignment, and the date of the next Mastermind.

Once data for a particular session has been entered and finalized, you **must** click the "**submit**" button. This button saves the data on the page. When you access the worksheet for your next Mastermind, the data that you saved from your previous one will still be showing. Simply delete this information and replace it with the most current Mastermind's information. **If you don't click submit and navigate away from the page, your information will be lost.**

Once you click Submit, click the PDF icon located at the bottom left of the page. **Again, it is important to click submit first in order to save the data**. When the PDF button is clicked, you should then receive a prompt to save the newly-created document to your computer. Save this document to your computer and then email it to help@ackertinc.com.

Should you have any questions about the worksheets or notice any issues, please email help@ackertinc.com for assistance.