

Client Name _____ Date _____

What	Details	✓	Notes
1. WELCOME CLIENT: Take control of session and explain how things will go today			
What are the Client's aims from Coaching?	Ask: "What do you want to achieve from Coaching?" <ul style="list-style-type: none"> Do you have any specific Goals or issues to achieve/resolve? How will you know when you've achieved those goals? Why did they seek coaching now? (understand their motivation) 		
2. ADMIN: Payment, the coaching agreement and all the logistical and contact information you both need			
Agreement signed & returned?	If not, answer any queries and ask client to return before next session		
Client Information & Contacts	Get key personal details and contact information (if not already)		
Coaching Ethics/ Terms	Confirm they have a copy of your terms and conditions		
Payment	<ul style="list-style-type: none"> Money for first session / programme received? Confirm billing process eg. by monthly e-invoice/e-transfer 		
Admin/Logistics	Confirm how you will handle: <ul style="list-style-type: none"> Missed and late sessions Fees How to book a session Where: Phone/Zoom/Other Any upcoming vacations/trips that impact availability (yours & theirs)? 		
Set up next appointments	If not already agree frequency and confirm next 2-3 session dates/times		
3. COACHING PROCESS: Reassure client. What will happen/what they can expect during coaching			
What Coaching Is/Isn't	<ul style="list-style-type: none"> Coaching is a relationship between your coach and you The client is the expert in their life. Coaching helps connect you to your own wisdom and take action to create the life you really want Coaching is 100% confidential and non-judgemental Ask for two-way confidentiality (to cover what you share too) Coaching is NOT addiction/ counselling/therapy. 		
Your Coaching Philosophy	<ul style="list-style-type: none"> Share your coaching philosophy if you haven't already 		
What Coaching involves <i>What they should expect...</i>	<ul style="list-style-type: none"> How sessions will go/typical session structure Let them know their goals and focus may change over time Ups & downs are normal in coaching—as is reaching a plateau. The 'down cycle' is where we do most of our growth... Gain permission to: <ul style="list-style-type: none"> Interrupt them Challenge them Ask difficult questions Repeat back what they've just said Give them exercises / challenges during/between sessions Offer feedback and recommendations where appropriate 		
Role of Coach <i>What Client can expect from you</i>	<ul style="list-style-type: none"> Set your boundaries eg. I return email/phone calls promptly. Do you offer support outside sessions? Do you text message? I will help you set, clarify and maintain focus on your goals I will hold you accountable for what you say you're going to do I will help you establish your own solutions & strategies I will encourage, support and believe in you even when you may not I will challenge you and help you recognize where you may be holding yourself back. Together we'll raise your self-awareness 		
Role of Client <i>What you expect from Client</i>	<ul style="list-style-type: none"> To be honest and open (and to tell me when you can't be) Willing to adopt a more positive outlook on self and life Ready to be fully accountable for your life/decisions/actions Be responsible for your results. Your success is directly related to your commitment and the effort you make 		
How do they want to be Coached?	<ul style="list-style-type: none"> Ask: "How best can I coach you—what tips can you give me?" "What can you tell me about your learning style?" 		
Any questions?	<ul style="list-style-type: none"> Are there any outstanding questions about coaching/the process? 		
4. TODAY'S COACHING: Ensure client leaves feeling they have been coached, and have at least one action			
Client HISTORY / FACTS	<ul style="list-style-type: none"> "Tell me about yourself?"/ Current Reality – Ready to commit? 		
Coaching	<ul style="list-style-type: none"> Coaching around <i>Wheel of Life</i> / WOOP - or a small topic 		
Client has at least one action	<ul style="list-style-type: none"> Client chooses 1-3 actions to take away from session. TIP: This could also be to complete a coaching exercise or form as homework. 		
Feedback/Learning	<ul style="list-style-type: none"> Ask, "What's your Biggest Win from the session today?" 		