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| --- | --- | --- | --- |
| **What** | **Details** | **✓** | **Notes** |
| **1. Welcome Client - take control of session and explain how the session will go today** |
| What are the Client's aims from Coaching? | Ask "What do you want to **achieve from Coaching**?"* Do you have any specific Goals or issues to resolve/meet?
* How will you know when you have achieved those goals?
* Review Goals Sheet. If not completed, ask for by next session
* Why did they seek coaching now? This 'treasure' is key for their motivation
 |  |  |
| **2. ADMIN - Make sure you have payment & that you both all the practical information you need** |
| Agreement Signed & Returned? | If not, answer any queries and ask client to return before next session |  |  |
| Client Information Sheet | Complete for key details and contact information (if not already) |  |  |
| Coaching Ethics/Conduct | Confirm they have received a copy or let them know where it's available |  |  |
| Payment | * Money for first month/session/program/session series received
* Confirm billing process eg. by monthly e-invoice/by mail/transfer
 |  |  |
| Admin/Logistics | Review key points from Agreement:⇨ Missed and late appointments ⇨ Fees⇨ How appointments set up ⇨ Who calls who, etc.⇨ Discuss any upcoming vacations/trips (yours and theirs) |  |  |
| Set up next appointments  | If not already, set next 2-3 appointments |  |  |
| **3. COACHING PROCESS - Reassure client of what will happen/what they can expect during coaching** |
| What Coaching Is/Isn't | * Coaching is a relationship between your coach and you
* You are the expert in your life. Coaching helps you connect to you, your wisdom and take action to create the life you really want
* Coaching is **100% Confidential & Non-Judgemental**
* Ask for **two-way** confidentiality (covers what you share too)
* Coaching is **NOT advice/counselling/therapy**
 |  |  |
| Your Coaching Philosophy | * Share your coaching philosophy here if you haven't already
 |  |  |
| What Coaching involves - what they should expect… | * How **sessions** will go/session structure
* That their **goals and focus may change**
* That **Ups & Downs** are normal in coaching - as is reaching a plateau. The down cycle is where we do most growth...
* **Gain permission to:** ⇨ Interrupt them ⇨ Get tough with them⇨ Challenge them/Ask difficult questions⇨ Repeat back what they have just said⇨ Give them forms/exercises/inquiries during/between sessions
* **Client decides** what to cover, how/when to end coaching
 |  |  |
| Role of Coach- What Client can expect from you | * Set your boundaries here. Eg. returning email and phone calls within **one working day**
* 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 & believe in youeven when you may not!
* I will **challenge you** and help you recognize where you may be **holding yourself back**. Together we raise your **self-awareness**
 |  |  |
| Role of Client - What you expect from Client | * 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
* **YOU are responsible for YOUR results**. Success is directly related to your **commitment** and the **effort you make**
 |  |  |
| How do you want to be Coached? | * Ask, "How best can I coach you - what tips can you give me?" &
* What can you tell me about your learning style?
 |  |  |
| Any questions? | * Are there any outstanding questions about the Coaching process?
 |  |  |
| **4. TODAY'S COACHING - Be sure client leaves feeling they have been coached, and have at least one action** |
| Client HISTORY | * Review completed **Life Map** or ask them to, "Tell me a little bit more about yourself?"
 |  |  |
| Coaching | * Coaching around Wheel of Life if completed, or small client chosen topic
 |  |  |
| At least **ONE action** | * Client chooses. Can be to complete exercise from Welcome Packet
 |  |  |
| Feedback/Learning | * Ask, "What is your **Biggest Win** from the session today?"
 |  |  |