Intake Session Checklist

Client Name: ________________________ Date: ____________

The Initial Interview should follow this Intake Session Checklist to develop a better understanding of the client (their way of thinking); and help the client better understand what coaching is, what to expect and the role of the coach and client.

What	Details	✓	Notes
1. WELCOME THE CLIENT - Take control of session and explain what you will be discussing today.			
Intake Form - questions	• Tell me something about your story, anything that you believe will help me better understand and support you. • “What are the top 3 accomplishments, thus far, in your life?” “What or who helped you achieve those?” • “What have been your greatest disappointments?” “What do you know about yourself that may have caused a lack of progress?” • “Who are your heroes?” “Who do you admire and what do you admire about them?” (These can be people you know, people you know about, or even fictional characters.) • “What’s the next chapter in your story?” • “What concerns or challenges have taken most of your attention the last 6 months?” • “What specific challenges or problems would you like to resolve?” • “What are your reasons for being coached at this time in your life?” • “How will you know if coaching is effective for you?”		
2. COACHING PROCESS			
Explain what Coaching is and is not!	• Coaching is about a relationship between the coach and the client to **create a better life that the client wants.** • It holds the client accountable to change according to his or her plan(s), and **action is absolutely key**. • Coaching doesn’t necessarily show you anything NEW – usually we know what we need to do! But it can give you a very different outlook - to see the world and yourself differently. • **100% confidential (except for any harm), and Non-judgemental** • It is about **Raising awareness, NOT** giving advice, counselling, or therapy.		
What Coaching involves - what they should expect…	• How **sessions** will go/session structure. • **Change** (reaching their goals) is part of the process. • **Ups & Downs** are normal in our lives – as is reaching a plateau. • **At this time, gain <u>permission</u> to:** ⇨ interrupt them if they wander away from their goal of the session ⇨ challenge them by asking difficult questions ⇨ give them forms, exercises, assessments during or between sessions • **Explain that the Client decides** the agenda for each session. • **The Coaching Relationship** is **two-way** communication.		
Role of Coach: - what Client can expect from you	• Set your boundaries here. (Returning emails and phone calls – how quickly, etc.) • Help work out, set, clarify and maintain a **focus on your goals**. • Graciously hold you **accountable** – for what you say you’re going to do. • Help you establish your own **solutions & strategies**. • **Encourage,** support & believe in you! Even when you don’t! • Raise your **self-awareness, CHALLENGE you,** and help you to recognize where you may be **holding back**.		
Role of Client - what you expect from Client	• To be **honest and open** (and tell me when you can’t talk about something). • • **Be willing** to adopt a more positive outlook on self and life. • Be ready to be fully **accountable** for your life, decisions, and actions. • Remind them: **YOU are responsible for YOUR results**. Success is directly related to your **commitment** and the **effort you give to make it happen**.		
3. ADMIN			
Coaching Ethics/Conduct	• State and explain that **Coaching** holds high values on ethical conduct.		
Client Information Sheet	• Send Client the Information Sheet (if not already)		
Email the contract ahead. Review key points and check for clarity.	⇨ How appointments(sessions) are set up ⇨ Missed and late appointments ⇨ Who calls who for the coaching session? ⇨ Discuss how to handle missed sessions and coaching fees		
Set up next appointments	Try to set up sessions at two weeks apart to give the client plenty of time to accomplish their action plan and to think about what they have learned. End each session setting up or verifying the next appointment.		

4. Ending Today

“What is something you want to make sure you hold onto going forward?” “Something you value deeply.”