

Intake Session Checklist

Client Name:

Date:

The Intake Session helps the coach develop a better understanding of the client's needs, their way of working and helps the client understand what coaching is, what to expect and the role of the coach and client. It also clarifies admin, billing and deals with any questions your client may have.

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?" <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> »» 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Share your coaching philosophy here if you haven't already 	
What Coaching involves - what they should expect...	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> »» 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	<ul style="list-style-type: none"> 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 you even 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	<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 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?	<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 the Coaching process? 		
4. TODAY'S COACHING - Be sure client leaves feeling they have been coached, and have at least one action			
Client HISTORY	<ul style="list-style-type: none"> Review completed Life Map or ask them to, "Tell me a little bit more about yourself?" 		
Coaching	<ul style="list-style-type: none"> Coaching around Wheel of Life if completed, or small client chosen topic 		
At least ONE action	<ul style="list-style-type: none"> Client chooses. Can be to complete exercise from Welcome Packet 		
Feedback/Learning	<ul style="list-style-type: none"> Ask, "What is your Biggest Win from the session today?" 		