

## Discovery Session Checklist

### Welcome — Delighted to Work with Them

#### Set Up Agenda for the Session

- ☐ Where Are You Now?
- ☐ Where Are You Going?
- ☐ Primary Focus
- ☐ Agreements/Design Me

#### Where Are You Now?

- ☐ Wheel
- ☐ Values

#### Where Are You Going?

- ☐ Goals
- ☐ Vision
- ☐ Captain and the Crew
- ☐ Commitments
- ☐ Habits

#### Design Me

- ☐ Client Questionnaire
- ☐ Primary Focus

#### Training the Client

- ☐ Inquiry
- ☐ Saboteur

#### Payment

- ☐ Session Times

☐ Vacation