

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