

The Initial Session (Discovery Session)

Your initial appointment with a client is called a foundation session or discovery session. These appointments vary in length, though they are commonly two to three hours long (sometimes split across multiple sessions). Some coaches use multi-day in-person appointments, so there is a wide variety of formats.

It is important to be organized in your initial work with your client. This establishes a professional tone for your relationship. You may have a questionnaire and information packet that you send them once you have established your first appointment. Send this packet to your client at least a week before the discovery session so that they have plenty of time to do the reading, fill it out, and send it back to you before the appointment.

The most important aspect of the discovery session is to create relationship with the client and design the alliance. Here is a list of some common ingredients in an Initial Packet/Session:

1. Client information such as name, mailing address, phone numbers, birthday, family members, employer, etc.
2. Information about who the client is, e.g., Values Clarification, Life Purpose, Passions.
3. What the client wants from coaching such as goals, objectives, or personal development areas they would like to address in coaching.
4. What's going on in the client's life right now? What challenges are they facing? Where are they in or out of balance in their life?
5. Design the alliance: How do they want you to be as their coach? What kind of support do they want from you? Ask for permission to intrude, challenge, and hold them accountable.
6. Train the client how to be in coaching: Requesting, ongoing design of the coaching relationship, open and honest communication.
7. Relationship logistics: review the coaching agreement, set clear expectations about fees, invoices, payments, who calls who, scheduling process.
8. Agree on any next steps or any homework.
9. Collecting payment for the sessions (if you haven't done this already).

Experiment with your discovery session to determine what works best for you and your clients. In the beginning, give a range of time for the appointment such as 2 to 2 1/2 hours, until you get a sense of what you want to include and your own timing. When designing your initial packet and session, good questions to ask yourself are "What do I need to do to establish a solid alliance with this person?" "What do I need to know about this person so that I can coach them effectively?"

It is important that the client take responsibility for the coaching relationship right from the beginning, so make sure your agreements are clear, and that the client has ownership for the relationship. Many coaches have a client sign a coaching agreement or contract that details what coaching is, fees, expectations regarding payment, session cancellation, notice for termination, and the like.

Remember that you are a professional, you are running a business, and you are establishing a professional relationship (even when you are doing pro-bono work). Do whatever you need to do to create an environment of professionalism and set clear expectations. This doesn't mean that you can't be your natural warm, loving self but rather that you set the tone of having a business relationship.