co-active

Individual Client Discovery Checklist

Items to go over with the client:

1. Welcome the client.
2. Explain how the session will go today.
3. Explain about coaching.
4. Outline your background.
5. Discuss confidentiality and security.
6. Ask the client, “May I mention that you are a client?”
7. Design the alliance: “How do you want to be coached?”
8. Grant the coaching relationship power.
9. Explain balance and score the Wheel of Life.

10 Discuss values clarification and explain the Saboteur.

11. Fill out the Primary Focus form.
12. Review any other forms that will be used.
13. Write in the Completion Log any actions to be taken.
14. Set up the next three appointments in calendars.
15. Discuss how the calls will go, explain the homework inquiry, and remind the client about the ups and downs of the process.
16. Fill out the Coaching Agreement and Personal Information forms, noting the impact of vacations, late or missed calls, and other arrangements.
17. Receive money for the discovery session and the first month. Explain about the monthly billing process (written invoice or phone invoice).
18. Talk about the issue of commitment, discuss being human, and and explain that learning and change take time.
19. Other: ____
20. Thank the client and express your eagerness to begin work.