Discovery Session Checklist

Use this checklist to help you track the items you want to include in your discovery session.

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?
☐ Values
Where Are You Going?
Goals
☐ Vision
☐ Future Self
☐ Commitments
☐ Habits
Design Me
☐ Client Questionnaire
☐ Primary Focus
Training the Client
☐ Inquiry
☐ Saboteur
Payment
☐ Session Times
☐ Vacation

