

# Intake Session Checklist

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

The Intake session helps the coach develop a better understanding of the client needs, their way of working and helps the client understand what coaching is, what to expect and the role of the coach and client.

What	Details	✓	Notes
<b>1. WELCOME CLIENT - Take control of session and explain how the session will go today.</b>			
What are the Client's aims from Coaching?	Ask "What do you want to <b>achieve from Coaching?</b> " <ul style="list-style-type: none"> <li>• Do you have any specific Goal/s or issue/s to resolve/meet?</li> <li>• How will you know when you have achieved those goals?</li> <li>• Review Goals Sheet. If not completed, ask for by next session.</li> <li>• "Why seek coaching now?" This 'treasure' is key to moving them forwards.</li> </ul>		
<b>2. ADMIN</b>			
Agreement Signed & Returned?	If not, answer any queries and ask for return before next session.		
Coaching Ethics/Conduct?	If you've sent, confirm receipt or remind them where available.		
Payment	<ul style="list-style-type: none"> <li>• Money for first month/session received</li> <li>• Monthly billing process – e-invoice/by mail/phone?</li> </ul>		
Can I mention you are a client?	Ask and record a Y/N here for your records		
Client Information Sheet	Complete Client Information Sheet (if not already)		
Admin	Admin/logistics - review key points from Agreement like: <ul style="list-style-type: none"> <li>⇒ missed and late appointments ⇒ fees</li> <li>⇒ how appointments set up ⇒ who calls who etc</li> <li>⇒ discuss any upcoming vacations/trips on both sides</li> </ul>		
Set up next appointments	If not already, set next 2-3 appointments.		
<b>3. COACHING PROCESS</b>			
What Coaching Is/Isn't	<ul style="list-style-type: none"> <li>• Coaching is about a relationship between the coach and client to <b>create a life/career the client wants.</b></li> <li>• It holds you accountable to make change, <b>action is absolutely key.</b></li> <li>• Coaching doesn't necessarily show you anything NEW – usually we know what we need to do! But coaching can give you a very different outlook - to see the world and yourself differently.</li> <li>• <b>100% confidential</b> • <b>Non-judgemental</b></li> <li>• <b>Raising awareness</b> • <b>NOT</b> advice/counselling/therapy</li> </ul>		
Your Coaching Philosophy	Share your coaching philosophy here if you haven't already.		
What Coaching involves - what they should expect...	<ul style="list-style-type: none"> <li>• How <b>sessions</b> will go/session structure.</li> <li>• <b>Change</b> (eg. their goals) is part of the coaching process.</li> <li>• <b>Ups &amp; Downs</b> – are normal in coaching – as is reaching a plateau. Note: We need the DOWN cycle for spiritual growth!</li> <li>• <b>Gain permission to:</b> <ul style="list-style-type: none"> <li>⇒ interrupt them ⇒ get tough with them</li> <li>⇒ challenge them/ask difficult questions</li> <li>⇒ repeat back what they have just said</li> <li>⇒ give them forms/exercises/inquiries during/between sessions</li> </ul> </li> <li>• <b>Client decides</b> what to cover, how/when to end coaching.</li> <li>• <b>Coaching Relationship</b> is <b>two-way</b> confidentiality.</li> </ul>		
Role of Coach - what Client can expect from you	<ul style="list-style-type: none"> <li>• Set your boundaries here. Eg. returning email and phonecalls within <b>one working day.</b></li> <li>• Help work out set, clarify and maintain <b>focus on your goals.</b></li> <li>• Hold you <b>accountable</b> – for what you say you're going to do.</li> <li>• Help you establish your own <b>solutions &amp; strategies.</b></li> <li>• <b>Encourage</b>, support &amp; believe in you! even when you do not!</li> <li>• Raise your <b>self-awareness</b>, <b>CHALLENGE you</b> and help you to recognize where you may be <b>holding yourself back.</b></li> </ul>		
Role of Client - what you expect from Client	<ul style="list-style-type: none"> <li>• To be <b>honest and open</b> (and to tell us when they can't be).</li> <li>• <b>Willing</b> to adopt a more positive outlook on self and life.</li> <li>• Ready to be fully <b>accountable</b> for your life/decisions/actions.</li> <li>• Remind them: <b>YOU are responsible for YOUR results.</b> Success is directly related to their <b>commitment</b> and <b>effort made.</b></li> </ul>		
How do you want to be Coached?	<ul style="list-style-type: none"> <li>• Ask "How best can I coach you - what tips can you give me?"</li> <li>• What can you tell me about your learning style?</li> </ul>		
Any questions?	<ul style="list-style-type: none"> <li>• Are there any outstanding questions about the Coaching process?</li> </ul>		

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4. TODAY'S COACHING			
Forms/Homework	<ul style="list-style-type: none"><li>• "What did you learn about yourself from your homework?"</li></ul>		
Client HISTORY	<ul style="list-style-type: none"><li>• <b>Review Life Map</b> or <b>Tell me</b> a little bit more <b>about yourself?</b></li></ul>		
At least <b>ONE action</b>	<ul style="list-style-type: none"><li>• Client chooses. Can be incomplete exercise from Welcome Pack.</li></ul>		
Feedback/Learning for you	<ul style="list-style-type: none"><li>• "What is your <b>Biggest Win</b> from the session today?"</li></ul>		

[http://www.thecoachingtoolscompany.com/free\\_resources/intake-session-checklist-template/](http://www.thecoachingtoolscompany.com/free_resources/intake-session-checklist-template/)