

Coaching Session Agenda

Use this master checklist to make sure you are doing a masterful job. Fill in the first section prior to the call. Use this form during the session to document the client's activity and the content of the call.

CLIENT _____

DATE _____ **TIME** _____

BEFORE THE CALL

- Get clear of the previous call.
- Review this client's file, promise log and goals list and outline what you want to accomplish/discuss now:
 - 1) _____
 - 2) _____
 - 3) _____
 - 4) _____

STARTING THE CALL

- _____, how are you? I am glad you called.
- Tell me what's happened since our last call.

Shifts _____

Results/Wins _____

Problems _____

Progress Report _____

CONTENT OF THE CALL

- Distinction shared _____
- Requests made _____
- Observations shared _____
- Advice given _____
- _____
- _____

TOWARDS THE END OF THE CALL

- _____, we have about 5 minutes left.
- Homework given _____
- Confirm next call date, time and procedure.

AFTER THE CALL

- Update client's file and file this form.

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