



CHECKLIST FOR ESTABLISHING A STRONG START TO YOUR COACHING RELATIONSHIP

Just like building a house, there are certain foundational processes that you will want to put in place at the beginning of your coaching relationship or each coaching session in order to get off to a strong start that will create strength, endurance, and a fabulous coaching experience.

Here is a checklist of things to put in place:

- ✓ **Coaching Contract**
- ✓ **Welcome Questionnaire:** create a client questionnaire that will help you learn any necessary background information from your client, as well as give your client an opportunity to assess and state where s/he is, who s/he is, and what she wants to achieve through the coaching relationship.
- ✓ **Establish Your Clients Coaching Goals:** It's so important to be 100% clear on your client's goals and vision at the start of your coaching relationship and then to check in on how those goals may or may not be changing on a regular basis. This helps you stay focused on your client's agenda, and know when you're getting off-track or distracted. Some great ways to establish client coaching goals are: 1) include a question about it on your welcome questionnaire 2) take the time to discuss goals in your first meeting, and 3) check on goals regularly during sessions.
- ✓ **Include a Special "Kickoff Conversation":** I highly recommend adding a special "kickoff session" at the start of your coaching sessions. The purpose of this special session is to have the time and space to establish trust, to get super clear on the client's goals and visions, to also get clear on the client's obstacles and sabotaging techniques or patterns, to learn more about the "who" of your client, and to establish any important protocols or procedures for your work together.
- ✓ **Start Each Session Powerfully and with Intention:** How you start each coaching conversation can make a huge difference in the power, effectiveness, clarity, and progress of each call. Don't jump right in to your coaching any current situations, but instead take the time at the start of each session to create an environment of presence and establish focus and goals for that session. I often start coaching calls with a short meditation that allows clients to become more present to themselves, their bodies, and the call, and then ask a question or two that establishes the focus of the call. For example, you can ask questions like: "What would you like to focus on for today's call?",

“What are your intentions for our time together today?”, or “What would you like to walk away from this session with?”

- ✓ **Focus Report/Progress Report:** You may find it very helpful to create a short progress report that your client can fill out and return to you before each coaching session. The progress report can include questions that help you get a sense of your client’s experience since you last spoke. For example: what your client has accomplished, where s/he has gotten stuck, what s/he has learned, and where s/he wants to focus next. A progress report is also a great supplemental tool that helps your client assess their forward movement and locate where they are on a regular basis.