

First Coaching Session Checklist

Annual Wellness Planning Session

wellcoaches®

The first coaching session with a client is critical for establishing long-lasting trust and rapport. This session is well suited to be an annual wellness planning session. The following provides a checklist for a successful first session. Allow at least 60 - 75 minutes for this session.

✓	Action
BEFORE THE SESSION	
	Review the Well-being Assessment: Seek out success, notice aliveness, consider stages of change, question gaps, note concerns
	Practice Mindfulness
	Remember the key coaching skills: Mindful Listening, Inquiry and Reflection
	Formulate initial, strengths-based inquiries
SESSION OPENING	
	Welcome and thank you
	(Video Conferencing) Confirm client is logged on and at "Start Session"
	Thank client for completing the well-being assessment
	Review the Session Agenda: Introduction of coach, confirm client's expectations and priorities, gather additional information, create wellness vision, design goals, and (if applicable) tour client website
	Introduction of Coach: Share personal passion, credentials and experience
EXPECTATION SETTING	
	What is coaching
	Confidentiality
	Record keeping
CONFIRM WELL-BEING ASSESSMENT	
	Ask client what questions they have after completing the well-being assessment
	Ask client what they learned about themselves by completing the well-being assessment
	Gather missing information and clarify the coach's questions
	Discuss client's medical history and need for physician release, if applicable
CREATE A WELLNESS VISION	
	Explain the value of creating a wellness vision
	Ask what is most important to the client right now
	Collaborate to identify the client strengths: Review success stories, discuss what is working now, discover what gives the client pride
	Discover the client's motivators: ask about the benefits of making changes now, ask about the driving force behind the desire to change now



✓	Action
	Ask about the client's vision (hopes, wishes and dreams) for wellness
	Support the client in visualizing their vision and describing it in detail
	Use confidence ruler to assess and improve self-efficacy
	Ask what challenges would be met and what things would be possible if the vision were a reality
	Discover previous positive experiences with elements of the vision
	Identify the strengths and values that could be used to reach the vision
	Explore the structures (people, resources, systems, and environments) needed to ensure success
	Ask the client to state and commit to the vision
DESIGN THREE-MONTH GOALS	
	Explain the nature and value of setting three-month goals
	Brainstorm actions that would lead to the achievement of the wellness vision
	Ask the client to choose three of the actions that are most important to pursue
	Confirm the connection of the actions to the wellness vision
	Assist the client in translating the actions into SMART behavioral goals
DESIGN FIRST WEEK'S GOALS	
	Ask the client to choose a goal that is important
	Explore the structures (people, resources, systems, and environments) needed to ensure success
	Assist the client in designing a SMART behavioral goal
	Use confidence ruler to improve the client's confidence in reaching the goal
	Ask client to restate the goal
	Affirm the client's ability to achieve the goal
(If applicable) TOUR THE CLIENT WEBSITE	
	Note you will email the vision, three-month goals and weekly goals
	Tour the home page
SESSION CLOSE	
	Express appreciation for the client's work
	Discover and reflect what the client learned
	Ask for feedback on how future coaching sessions would best support the client's path
	Clarify expectations regarding payments, scheduling, rescheduling, and length of sessions
	Schedule the next session

