# Weekly Coaching Session Checklist
## Realizing a Wellness Vision

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Weekly coaching sessions (weekly, biweekly, or monthly) assist clients to stay on track with their goals and to design new goals based on their level of progress and engagement. The following provides a checklist for successful coaching sessions.

| √ | Action |
|---|---|
| **BEFORE THE SESSION** | |
| | Review notes from previous session(s) |
| | Practice Mindfulness |
| | Remember the key coaching skills: Mindful Listening, Inquiry and Reflection |
| | Formulate initial, strengths-based inquiries |
| **SESSION OPENING** | |
| | Asks how the client is right now “in this moment.” |
| | Uses reflections to show understanding of client’s state. |
| | Asks the client to share the best thing that happened from previous week(s) |
| | Reflects something positive about the client (e.g., highlights, strengths, or emotions) |
| | Asks client to select the first weekly goal to be discussed |
| **WEEKLY GOAL REVIEW** | |
| | Explores full experience with weekly goal, starting with the positive |
| | Uses reflections to show listening and understanding of the goal experience |
| | Expands inquiry about the client’s best experience with his/her weekly goal |
| | Responds to client challenges with judgment-free reflections and inquiries |
| | Asks what the client learned from his/her experience |
| | Affirms the client: strengths, choices, and/or situation |
| | Inquires about the client’s percentage of success |
| **THREE-MONTH GOAL REVIEW** | |
| | Validates the relevance of the client’s Wellness Vision and connection to three-month goals |
| | Asks about the client’s best learning or growth experience with his/her three-month goals |
| | Asks about the client’s level of commitment with his/her goals and whether he/she wants to revise them |
| | Affirms the client’s strengths, abilities, or growth. |

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| **GENERATIVE MOMENT** | |
| | Collaborates with the client to identify the topic to work on, where he/she has aroused emotional energy and interest |
| | Asks for permission to explore and work on the topic now |
| | Encourages the client to describe what he/she really wants now, in relation to the topic |
| | Explores the strengths or values the client can leverage to move forward |
| | Explores the environments the client can leverage to move forward |
| | Explores decisional balance and develops discrepancy when the client demonstrates ambivalence |
| | Engages the client in creative brainstorming of pathways forward |
| | Expresses confidence in the client's ability to move forward |
| **GOAL SETTING** | |
| | Asks the client to choose a goal that is important and that he/she is ready to pursue |
| | Explores the support, structure, or environments needed to ensure success and handle challenges |
| | Assists the client to refine goal to be a SMART behavioral goal |
| | Uses confidence ruler to improve the client's confidence in reaching that goal |
| | Asks client to restate goals |
| | Affirms client's ability to achieve his/her goals |
| **SESSION CLOSE** | |
| | Communicates an appreciation of the client's work in the session |
| | Discovers and reflects what the client learned in the session |
| | Asks for feedback on how future coaching sessions would best support client's path |
| | Schedule next session |

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