Intake Session Checklist

 WHAT DETAILS DONE NOTES

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| --- | --- | --- | --- |
| 1- Welcome\*Client’s Goals | Goals questionnaire |  |  |
| Emotional intelligence survey |  |  |
| 2- Admin\*Agreements | Roadmap |  |  |
| Informed Consent |  |  |
| 3- Coaching\*Process | Explain coaching process |  |  |
| Share my philosophy |  |
| Set up session structure |  |
| Schedule two future sessions |  |
| Set coach & client expectations |  |
| Client’s question opportunity |  |
| 4- Today’s Session | Payment |  |  |
| Review |  |

 Client name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_

 Coach name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_