

Career coaching recap

Review and opportunities | Facilitator completes and confirms with the client

Client name	Session date
Facilitator	Notes source
Primary issue and desired outcome	
Key facts, prior attempts, and what the client controls	
Options considered and important tradeoffs	
Selected direction and why it fits	
AI and recording consent status	Recap delivery date and method

Actions and the next 30 days

Up to three actions | Agree on an owner, due date, and success measure for each

Action 1

Owner	Due date	Success measure

Action 2

Owner	Due date	Success measure

Action 3

Owner	Due date	Success measure

First 48 hours

Next 7 days

Next 30 days

Fallback if progress stalls

Review date	Read-back confirmed by and on