FIRST COACHING SESSION CHECKLIST

The first session is critical for long lasting trust and rapport. Allow 60 or more minutes.

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| **Before the session** | |
|  | Remember key skills of mindfulness, listening, inquiry and reflection |
|  | Pray for the Lord's guidance |
| **Session opening** | |
|  | Welcome and thank you |
|  | Determine if the coaching information came and if there are any questions. (optional) |
|  | Review agenda and coach credentials and passion |
|  | Ask what questions came up after (if) they went over the health evaluation. |
|  | Ask what they learned about themselves, gather needed information |
|  | Go over the medical history, discuss physician release to exercise if needed. (optional) |
|  | Ask their permission to pray for guidance in planning |
| **Create a wellness vision** | |
|  | Explain the value of creating a wellness vision |
|  | Ask what is most important right now, what are the hopes and dreams for wellness |
|  | Review success stories, identify strengths and what is working now or brings pride |
|  | Discover motivators: benefits of making changes now, the driving force behind the desire to change now. |
|  | Support them visualizing their vision and describing it in detail |
|  | Discover previous positive experiences with elements of the vision & their strengths |
|  | Explore the people, resources, systems, environment needed to ensure success |
|  | Ask them to state and commit to the vision |
| **Design three month goals** | |
|  | Explain value of three month goals |
|  | Ask them to choose three actions that are most important to pursue |
|  | Confirm their connection to the wellness vision |
|  | Assist them in translating the actions into general goals |
| **Design first week's goals** | |
|  | Ask them to choose one or two actions in their goals to work on |
|  | Assist them to design a SMART behavioral goal that is easy, to develop confidence |
|  | Explore structures needed to ensure success |
|  | Use confidence ruler (0-10) to improve their confidence in reaching the goal |
|  | Ask them to restate the goal and affirm their ability to achieve the goal |
| **Session close** | |
|  | Express appreciation for their work, & email or slow mail their vision and goals |
|  | Schedule the next session, clarify length of sessions following |