New Client Checklist

Check each box as you complete each step.

Client

Before Accepting A Client	
☐	Do I really want to work with this person?
☐	What are the 3 things I **know** I can do for them?
☐	Will they stick around for at least 6 months?
☐	Can I learn a lot from this relationship?
☐	Will this person add to my practice and reputation?
☐	Is this person going to be able to pay the coaching fee, on time?
☐	Is this person ready for a **coach**, or do they need someone/something else?

After Acceptance, Before First Session	
☐	Schedule first call or appointment.
☐	Find out what the person wants to work on most.
☐	Get a minimum 3-month agreement.
☐	Get a check for the first month's coaching.
☐	Send paperwork/assessments to complete prior to 1st session.
☐	Review the ground rules, agreements and terms of relationship.
☐	Double check to make sure the client is ready and right for this.

During The First Session	
☐	Welcome the client.
☐	Design up to 3 goals or projects to work on for 90 days.
☐	Get all of the assessment scores.
☐	Discern where the person is on path of development.
☐	Discern the current block(s) to success.
☐	Tell the client what to do during session.
☐	Give the client 3 pieces of homework.
☐	Schedule next/subsequent sessions.