

Checklist for your first coaching meeting

As a coach, you set the tone for the first meeting. In fact, it may be what inspires your client to come back!

Here are some things to help you make your first coaching session a success:

- Welcome the client and greet them warmly, set a positive tone.
- Introduce yourself and your role: This is a partnership to help the client work towards a goal they set.
- Get to know the client and their current financial reality.
- Begin the coaching relationship by getting a sense of their goals and motivations, try to build trust.
- Start developing action steps for the next possible meeting.

Remember to use the coaching conversation model:



Note: There should always be a Stage 1 and 6, a focus and a completion. Stages 2-5 are flexible. The coaching conversation model is only a framework – as a coach you do not have to be rigid or tied to it. Good luck!

Conversation stage	Potential coaching steps	Coaching tools/ questions you could ask
1 Clarity/Focus	<ul style="list-style-type: none"> Hear your client's story, the reason why they are here so they feel heard Help the client set a focus and clear distractions Find out more about their desired outcome for today 	<ul style="list-style-type: none"> What would you like to accomplish as a result of being in today's meeting? Repeat back their answer so everyone clear on what is going to be focused on.
2 Motivation	<ul style="list-style-type: none"> Get a better understanding of the client's financial situation – why are they here? Try using the Financial Wheel of Life to see what areas the client is motivated to work on 	<ul style="list-style-type: none"> What result will this goal/action bring you? What will be achieved and how will it benefit you? I heard you say "...", does that mean "...?" Financial Wheel of Life
3 Exploration	<ul style="list-style-type: none"> Establish a baseline and explore all of the client's possibilities, resources and anything relevant to their process and outcome Create dialogue: Ask questions about client's personal finances using assessment tools Recite back the agreement with the client – get all types of ambiguity out of the equation to better serve the client Explore options available for client to improve financial situation 	<ul style="list-style-type: none"> What are you looking to achieve from this process? What kind of support are you looking for? What current needs do you have? Financial Health Assessment Financial tools related to the client's goals
4 Action planning	<ul style="list-style-type: none"> Design action steps: Given the client's new insight what do they want to focus on? What steps are needed to accomplish their task/goal? On the first session, establish a very general goal of what the participant hopes to accomplish. What path will they take to move from Point A to Point B? Make sure the client buys in and is agreeable to the steps Brainstorm or mind map resources that may be available to the client 	<ul style="list-style-type: none"> What would you like to work on first? What steps do you need/want to take to get to your goal? Goal setting template or SMART goal framework Action plan template Brainstorming Mind map
5 Accountability	<ul style="list-style-type: none"> Hold the client accountable or have them hold themselves accountable (or family member etc.); help ensure that what is agreed upon happens Discuss logistics: timeline, meeting schedule, check-ins Provide the participant a couple of things they can do before your next meeting (based on action plan) 	<ul style="list-style-type: none"> Who will you be accountable to? Are you ok if I follow-up with you next week to see how it went?
6 Completion	<ul style="list-style-type: none"> Thank the client and acknowledge what they have accomplished in the session Affirm what you have each learned today Schedule your next meeting or follow-up activity Have concrete next steps so that everyone is on the same page. Make note of it – for both client and coach. 	<ul style="list-style-type: none"> What did you get out of today's meeting? What was your takeaway? What will you move forward with now? Thank you for sharing, I look forward to seeing you again next Tuesday at 10 am.