

FIRST COACHING SESSION

TEMPLATE



Planning Your First Coaching Session with a New Client

Congratulations! You've enrolled a new client into your coaching business. What now?

Your first coaching session is like meeting someone for the first time: you want to make a great impression. And to do that, it's crucial that you prepare and design your session structure to make the most out of it.

The best way to start your preparations is to re-establish the goals and the outcomes that you will help the client achieve. One way to do this is sharing an [intake form or coaching form](#) that the new client can fill in and send back to you before the first session. In this questionnaire, they will have questions pertaining to what they want to achieve, where they are in life right now, is it what they had envisioned five years ago, and so on, that will give you clarity to design a coaching plan that fits your clients' needs and desires.

You also need to set up the method of delivery for the coaching. You can opt for online classes or provide in-person sessions with some form of online support. Whatever be the method of delivery, you need to clearly audible and visible to your client.

BUILDING A RAPPORT

When sitting for the first session, keep the discussion general for the first minutes. Establish some common grounds with your client. Make your client relate to you, and be assured that you will be helping them reach their goals.

For this, you can:

- ✓ Share some of your initial stories
- ✓ Tell them why you decided to become a coach
- ✓ Speak about some of your successful coaching experiences
- ✓ Share the changes you have seen in your after embarking on the coaching journey
- ✓ Ask the client to share some of their success stories
- ✓ Ask the client what their thoughts were when coming for the session

SETTING RULES

The ground rules will keep you both engaged in the coaching sessions. Often clients feel a lag or hit a plateau where they do not see any drastic changes in their life. They might feel less inclined to follow the sessions, or maybe some other engagements are causing a hindrance. The ground rules will help you both not waste each other's time.

Here are some examples of rules and expectations setting:

- ✓ Keeping all electronic gadgets on silent. The least amount of distraction should be present when the coaching is going on. This will keep you both focused—your client will talk better, and you can be more attentive and listen carefully.
- ✓ Discuss confidentiality and what the client expects from you. You will be collecting the personal data of your client, and you need to assure them that their information is safe. Unless you do so, they will not be completely honest with you.
- ✓ Highlight the importance of proper communication. The client should be dedicated to being on time for each session. If, for any reason, the client or the coach is unable to attend or host the session, communicating the same beforehand will be required.
- ✓ The client is paying for a service, and you will be delivering the same. You need to get the client to contribute to the rules too.

Set these ground rules in your [coaching agreement](#) with every new client and go through these in your first coaching session to set the right expectations from the get-go.

KEEP YOUR TOOLS IN ORDER

Nothing breaks the flow of a successful session like fumbling for your writing pad or looking for the projector remote. Before the sessions begin, keep all your tools like handouts, questionnaires, brochures, session planners, your notepad and pen, any gadgets like projectors and slides ready and operational. Your client can look through the material while you read the past assessment and highlight areas that need more clarity with respect to their answers.

SETTING HOMEWORK

A coach helps the client or coachee to achieve their goals. This is not limited to just asking questions and discussing the goals. As a coach, you need to help your client develop their instincts and address issues in a manner they see fit. You can help them only when you know the areas where they lack. After the first session, you can set them assignments like asking their employees to describe the client or maintain a journal till the next session. You can also set up some problems the solution to which the client has to provide.

Example:

Your client is an employee looking to increase their confidence and social skills. After the initial session, you can ask them to think of a way to solve a conflict between their co-workers. The goal of this homework will be to assess how much time they will invest in the well-being of others and still be on their own progress. This conflict solving capability will positively affect their confidence and make them approachable to others, thereby improving their social skills.

First Coaching Session Structure

If you are holding a 30 or 90-minute session, it could be broken down as follows:

First 15 minutes: conduct some breathing exercises to get you both into the zone and take in the surrounding. Initial awkwardness can be eliminated, and you both will become accustomed to the other's presence.

15 to 30 minutes: establishing the rules and talking about each other. You break the ice with some relatable stories and steer the conversation in the direction of the coachee. Make them talk, and you can listen with some prompts like what they felt when something negative happened, and so on.

30 to 45 minutes: discuss the goals of the client. Ask questions like why did they think coaching will help, how are they planning to achieve their goals, will they make some lifestyle changes as required. These goals, along with a reaffirmation of the goals set by the client, will help you establish a general direction for the next session.

Last 15 minutes: as you round up the session, you hand out homework and ask the client how they felt in the class. Always ascertain their well-being and comfort level with you and the sessions.

Dive deeper with our [coaching session template](#).

Tips To Prepare Before Coaching Sessions

Planning for your first coaching session – or even your second, third and fourth! – is not only about designing the coaching plan and session structure. It's also crucial that you are prepared mentally and energetically before entering a new session. After all, the first person you have to coach is you.

Here are some pre-coaching preparations you can follow:

01 Meditation

As a coach, you need to be in the right frame of mind before, during, and after each coaching session – and meditation can be a powerful tool to do that. You can practice some chants or mantras, or listen to a meditation track you enjoy. If meditation is not part of your routine yet, you can try other activities that can give you a similar effect of calming down and getting grounded. Maybe you use cooking or walking to connect with yourself and slow down. Any activity that will help you remove the anxiety from your psyche and bring clarity can be your meditative strategy. Focus on relaxing and living in the moment. If you cannot have the clarity, your clients will not feel safe in your presence. And the more present and grounded you are in your coaching session, the better results you can create for your clients.

02 Breathwork

One of the core requirements for any form of meditation is to focus on your breathing. Having enough oxygen in your lungs and system will help your brain to stay focused. As a coach, you have to be attentive to what your client is saying and what they are not openly accepting. While you are tasked to ask the hard questions, you need to be calm enough to not make the client feel intimidated. Donning a jovial yet professional personality will be possible when you are calm and have the strength to support the goals of your client. Breathing exercises like inhaling till your chest swells up and exhaling slowly while counting can effectively bring you to the present as you count each breath.

03 Have Clarity

The core objectives of the first two points are to bring you to a stage of calmness and alertness. While planning the coaching sessions, you need to have clarity about your methodology. How do you wish to deliver the sessions, and what should be the key takeaway from each session are some of the basics that you need to focus upon. Have the questions carefully crafted and determine the flow you want to take. Having a clear idea about the session, you will be conducting will help you stay focused and exude confidence that will make the client feel relaxed and positive about joining your coaching sessions.

In order to have clarity, follow a planner. Keep a chart about what the sessions will entail. You can add notes about what you think should be the focus of the session and how the client can reach their goals effectively.

04 Build Confidence

Hype yourself about your own methodology. As a coach, you need to stay energized and alert. While you are not required to jump around and radiate the athletic energy you surely possess, when you are confident, you exude positive energy that will keep the client focused on your words, and the impact you are looking for will be greater. Have confidence in your skills. Read up your materials if required, so you do not fumble too much. Practice the pose and stance that you will keep while interacting with your client. Having a confident and open body language further places your client in a relaxed place that will help build camaraderie.

05 Plan Each Session With Precision

Once you have developed your personality, you have to develop a doable session. This can be achieved once you read the client questionnaire submissions and focus on the questions that will be part of the session. You need to set the pace, and that will be determined by the amount of confidence you generate in your client. Be prepared to be a bit vulnerable and share some of your failures to success stories and your journey. Make your client feel confident in their choice to opt for coaching under your guidance. You can have a planner printed to share with the client that will keep you both on the same page (no pun intended) through every session.

Questions To Ask In Your First Coaching Session

Welcome them and keep a copy of their initial [intake form questionnaire](#) open to ensure discussion. The following questions will help you set the direction for the coaching session. You can modify the questions as per the type of coaching you are offering:

1. How are you feeling today?
2. Have you honestly filled up the pre-session questionnaire?
3. How comfortable were you with the questions?
4. Which questions made you think the longest? (here you can ask why related to those specific questions)
5. Since you are here, how would you want me to help?
6. Are you happy with where you currently are?
7. Is it what you envisioned 5 or 10 years ago?
8. What made you not achieve those dreams?
9. Do you regret where you are currently?
10. How stable do you feel your financial conditions are?
11. Can you define your most successful moment - personally and professionally?
12. If you had to rate yourself on a scale from 0 to 10 for the following, how would you rate yourself for:
 - a. Empathy
 - b. Emotional intelligence
 - c. Adaptability to circumstances
 - d. Being accountable
 - e. Resolving conflicts
 - f. Addressing issues with clarity
 - g. Knowing future goals
13. What motivates you the most?
14. What demotivates you the most?
15. How well are you able to communicate with others?
16. What made you choose the profession you are currently pursuing?
17. What plans for the future do you have?
18. What changes are you willing to make?
19. What other goals do you think you can achieve once you successfully complete the coaching sessions?
20. What form of guidance are you expecting from me?