



The Lightworkers'
Academy

Intake Session Checklist

Introduction:

- Clarify the purpose and duration of the intake session
- Clarify what coaching is and is not
- Clarify what the client expects from the coaching process going forward
- Establish what the client's goals are

Conversation:

- Describe the structure of coaching sessions
- Describe the client-centered coaching process
- Discuss how and what notes will be written up and/or recorded and shared
- Come to an agreement on the number of sessions scheduled, as well as dates and times.



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- Discuss coaching on/off hours
- Clarify payment terms, including any fees for missed or late sessions

Wrap-Up

- Sign coaching contract/agreement
- Clear up any questions or concerns the client has
- Establish mutually convenient means of communication (phone, text, email, messenger apps/IMs, etc.)

Follow-Up

- Leave the client with something to complete ahead of your next session (a written reflection or activity)
- Set up next session date/time
- Share with the client how you can be reached between sessions, if necessary/appropriate