DISCOVERY SESSION PREP FORM

Tell me in 5 short sentences what brought you to where you are today

What’s the one biggest thing you’d like to change in your life? (even if you’re scared to believe you could get it/deserve it)

Why is this so important to you?

What have you done so far to work on this?

What is blocking you from making it happen?

What will happen if you stay as you are and do nothing?

What will you be/do/have when you achieve this?

What do you believe we can achieve by working together?

Have you worked with a coach before?

If yes, what was the outcome?

(**Read notes on this - there is a big reason for why I put it in!)**

As your coach I will give my 100% commitment to you to help you achieve all you wish to create in your life but for you to be successful you also need to make a commitment. I will gently challenge you, hold you accountable and encourage you to be brave enough to step through your fears. In return you need to commit to our coaching relationship by taking consistent action, being open to new ideas and willing to try on new ways of thinking.

Knowing that now, on a scale of 1-10 how committed are you to working with me? (where 1 is low, 10 is high)

How much time, money and energy are you willing to invest to make your dreams happen?

Ps. How did you hear about me?

**In the questions above I asked what the outcome of their coaching was. The reason for this is that they might tell you they’ve been coached before but the coach didn’t help them, or they got nowhere. Explore that with them on the call as you may find they were the ones that didn’t take action so it might be nothing to do with the ability of the coach they worked with, it might be their lack of commitment!**
PREPARING YOURSELF FOR A SESSION – DISCOVERY OR COACHING

We’ve talked about self-care being really important and as part of that you could include some self-care strategies to get you into the right place for coaching.

A good day (where time is available to you to prepare)

What can you set as a routine prior to holding a coaching session?
(examples might be light a scented candle, read a book, read through the coaching forms to prepare for your session, meditate, go for a walk, listen to some relaxing music, cuddle your pet)

☐

☐

☐

☐

A not so good day (when things have gone wrong or you’re just running late)

What can you set as a quick coping strategy to park the problem(s) to get you into a state of mindfulness for your client?
(examples might be to take some deep breaths to slow your breathing down, to write down your concern to revisit it, use an affirmation, decide to focus just on your session, smile - yes it really helps, do something silly like a star jump or pull a funny face - something else to quickly take you to a place of happiness!)

☐

☐

☐

☐

☐

☐
PICK AND MIX QUESTIONS FOR YOUR OWN DISCOVERY SESSION
(adapt if you’ve already used some of these in your prep form)

What’s the one biggest thing you’d like to change in your life?

How long has xxxx been an issue/challenge for you?

What have you tried so far that has/hasn’t worked for you?

What is your biggest challenge with xxxx?

Why is it important that you crack/overcome/achieve this?

If you had more/less of xxxx in your life how would things be different?

What will happen if you don’t resolve this?

What are your thoughts on that?

What would it mean to you to resolve/achieve this?

How committed are you to getting this resolved?

What one change could you make this week that would make a huge difference?

Are you happy for me to share with you how I might be able to help you with this?

WHAT YOU SHOULD ASK YOURSELF BEFORE TAKING ON A CLIENT

1. Do I want to work with them?

2. Are they ready for coaching?

3. Can I help them?

4. Can they pay me?

5. If not, and I’m happy to work with them pro-bono, what might I learn by coaching them?

(No. 5 may seem like a selfish question but what can happen is you can become resentful if you give away your time and aren’t getting anything in return. I’ve seen it happen time and time again with my coaches. If you know you might learn something by coaching them, or perhaps you might like to practice some different techniques/coaching tools with them, then that might be reason enough for you to take them on and feel like there is a fair exchange)
DEALING WITH OBJECTIONS

There are 3 common objections, time, money and commitment.

You will be amazed at the number of people that say they don’t have the time to work on coaching, but what you also recognize is that by making the time everything will be much easier, so what to do?

“I can't afford it” - They may genuinely not be able to afford it and I don’t know about you but for me I don’t want people to be strapped for money when they work with me, it creates the wrong dynamic for our coaching relationship.

Possible script..

“If you had unlimited funds would you be choosing to work with me?”

If ‘yes’ then you can take it to the next step. If ‘no’, then close the call as below.

“Oh, I just thought I’d check that with you first before we move on.”

“What budget do you have for coaching?”

“A small budget”

You could discuss payment options with them first, maybe you offer a payment plan of some kind. You could also explore a lower priced point package or a tweak to something you currently offer at a reduced price

“Oh, well I have xxx lower priced point package that would allow you to work as part of a group/self study or have less contact with me, while still helping you to work on your…..”

“None”

If they say none, then obviously there is no point in pursuing it further. Offer to add them to your newsletter for some free hints and tips or to a support group if you have one* (like my Coaching Rocks for example). Ask them to keep you posted on how they are getting on. (see closing call note below)

If the issue is time you could explore how their life would be different with coaching, and explore ways in which they could create the time to work with you. It might be that they’ve been spending too much time on social media or not being focused in the right direction so there may be pockets of time they could create, plus it could be something you work together on as an overall strategy.
“I don’t have enough time” There may be times when this is genuine, they may be holding down a job, a family, be a carer for an elderly relative or suffer with ill health etc. Equally we all know that sometimes we aren’t managing our time effectively and this can have an impact on how we feel and what we actually can achieve.

Explore the time element with them.

Possible script..

“How would life be different for you if you had more time?”

“If you made the decision to invest in your personal growth and development how could you create some time for coaching?”

“How healthy is it to be working at this constant high level of productivity?”

Whether they work with you or not if you can give them the takeaway nugget that not having any time is unhealthy then you’ve done a great job!

“I don’t know, I need to think about it, ask my husband..” They may not be ready for coaching. You want to work with clients that are committed, so it may be that you’re not a right fit for them, or that they aren’t a right fit for coaching at this point in time. It doesn’t mean that won’t change. There are also times when people want to speak to their partner, their partner may be the one paying for the coaching so they want to run the idea by them before proceeding. I’m actually one of those clients - I love talking things through with my hubby, it helps me figure things out. I very often come back and work with that person.

Often though this response can mean there’s something else going on so it’s worth exploring further. They may even be having discovery sessions with a few people before committing to a coaching relationship.

It’s important to help them understand how taking no action is impacting on their life. If there’s a monetary cost related to the impact then get them to write down literally what it’s costing them in terms of money. That way they will immediately see the value of what your coaching will offer. It’s not always so tangible so you need to help them understand how working with you will help them achieve the outcome they desire.

When they say YES to working with you 😊

Be excited, be happy and let them know working with them is important to you. “I’m super excited to be working with you and helping you get...”

I’ll send you over a welcome pack that will give you all of the information you need for us to get started. Once you’ve made your payment go to my online calendar and book in your first session. You’ve got some pre-work to do that I’ll need back prior to our first session. Let’s get that first session booked in straightaway so that we can get you started on this exciting chapter of your life”.

© Ruby McGuire 2014
www.rubymcguire.com
Closing the call

If they just aren’t ready to work with you and/or you’re not the right fit then politely thank them for their time, say that you hope they’ve taken away a few insights that have been useful to them going forward. Ask them to keep in touch (if you do want to keep in touch) and tell them that if things change they know where you are. Tell them you’d like to put them on your mailing list for your newsletter so that you can share some hints and tips with them, and to keep in touch with them about special offers on future packages/programmes etc.

INTAKE SESSION NOTES

You could use a checklist for talking through areas of coaching

I used this checklist when I started out

ANOTHER WAY THAT YOU CAN RUN INTAKE SESSIONS

Instead of the forms being sent beforehand you could do the fact-finding in the first session with the client by working through some key questions, the Wheel of Life and doing some values elicitation work etc. *(NB - If you’ve not done values elicitation work yet with your coaching course you more than likely will at some point as it’s a key part of the coaching process)*

More of what you can include in your Welcome Pack coming in Module 8.
COACHING REVIEW FORM

Client:

Date & Time:

Method:
(I.e. Skype, Face to Face)

Next Session:

What were the main issues/areas discussed?

What insights/clarity occurred during the session?

What went well?

What didn’t go well? Explain why..
(Within circle of influence/control)

What would you do differently so that it goes better next time?

What were the agreed action points?

What else?
(Add any additional notes)
REFERRALS

How to refer

Be gentle, keep the possibility of coaching with you open. Here are some ideas around what you could say if the need arises.

“I can tell this is really upsetting for you. When I’ve had clients in the past that have found it hard to deal with (insert issue) they have found it really helpful to get the right support. I’m not sure I’m the right person for you at the moment as this (the issue involved) does not fall within the scope of my coaching. Often the lines between coaching and therapy are blurred and some clients can benefit from both. It may be helpful for you to talk to someone that has worked with clients in your situation.”

“I’d like to suggest that we put our coaching on hold for now and you contact your GP to find out who might be able to best support you” OR

“I’d like to suggest that we put our coaching on hold for now and I give you a link to the BACP who have a list of registered therapists that will be more qualified to help you.”

“If on taking up sessions with them you feel you’d like some coaching support alongside your therapy then, providing I have written consent from them, I’d be more than happy to help you work on your goals.”

“I’d love to coach you again when you’re ready and able to move forward. I just want to make sure you have the type of support that you need right now.”

British Association for Counselling & Psychotherapy - http://www.bacpregister.org.uk/

USEFUL LINKS

10 Powerful Questions To Enroll Coaching Clients Every Time
http://www.prosperouscoachblog.com/powerful-questions-enroll-coaching-clients/

Turn Your Discovery Sessions Into New Clients
http://kendallsummerhawk.com/ready-to-turn-your-discovery-sessions-into-new-clients/

Online Booking System - You Can Book
https://www.youcanbook.me/