



CLIENT CHECKLIST

Name:

Start Date:

Document:	Date Sent:	Returned:	Score / Comments:
Appointment Options			
Confirmation Email			
STAGE ONE			
Client Profile			
Coachability Index			
Six Benefits of Working with a Coach			
Top 10 Ways to Get the Most Out of Coaching			
STAGE TWO			
Welcome Letter			
Client Agreement			
Policies & Procedures			
Let's Get Started Checklist			
Intake Questionnaire			
Scope of Work Together			
Goals & Skills			
What Am I Tolerating?			
I am So Willing			
Call Prep Form			
How I Coach			
What to Talk About on Your Calls			
How to Get the Most Out of Your Coaching			
The Nature of Professional Coaching			
Thank You Card			

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STAGE THREE — ASSESSMENT

Clean Sweep			
NeedLess			
Tru Values			
Personal Foundation			

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ADD-ONS

Birthday Card			
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ADMINISTRATIVE

Monthly Invoice			
Monthly Appointment Reminder			
30-Day Evaluation			
Quarterly Evaluation 1			
Quarterly Evaluation 2			
Quarterly Evaluation 3			
Quarterly Evaluation 4			

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