

Coaching Session Notes

Joan Young, A-CFHC from our first cohort, created these note-taking forms. She shares the backstory of their creation, as well as how she uses them with clients:

"I developed the coach note-taking form as I began my work with clients, because I wanted a visually appealing yet concise way to capture all of the elements of a coaching session. As I began to use this form I realized that it also might help my clients to know the types of questions I would be asking. It gave them a roadmap of "what to expect" and sessions became easier to facilitate and more useful to them.

I offer every new client the note-taking form at the beginning of our work together. Some of my clients use it and love it. Others don't use it at all but do know that my process has a pattern to it. They also now know that I will always be starting with: What's something that went well this week? Starting with this inquiry of a success helps to open up positives and recognizing their progress, even if they are more in tune with the ongoing challenges."

Using Joan's examples below, think about how you might want to craft forms of your own. What types of questions/categories fit in within your coaching style?



SAMPLE COACH NOTES FORM

Client:

Date:

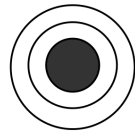
Session number:

Vision statement:

Long term goals



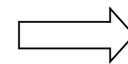
Does the client wish to share anything from the previous week? (success, challenge?) Notice strengths/reflect.



Client articulates focus for session



Explore!
Why is this important? How does this fit with their values and their vision?



What does client want to come away from the session with?

*Notice client language and emotion/energy
Spend time evoking, exploring, digging deep

Metaview Metaphor

Consider stages of change

Action steps :

-
-
-

How will client know they are successful?
How will they track?
What accountability supports/ fosters their self-efficacy?

Confidence ruler

How will they use knowledge of past to address obstacles?



Insights/Aha moments:



Coach development notes:

After listening to recording:
What do I notice?
What did I do well?
What do I need to work on?

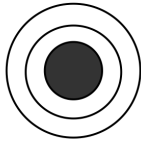


SAMPLE CLIENT NOTES FORM

My vision statement:

Long term goals:

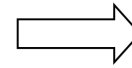
★ Share a success from last week:



What do I want to focus on today?



Why is this important?



What do I want to come away with?

Action steps this week:

-
-
-

Obstacles I foresee:

How will I know I am successful? How will I track my progress? What/who supports me?

What methods of accountability will help me accomplish my goals?



Insights/Aha moments: