

FIRST SESSION ROADMAP

(HOW TO ONBOARD A NEW CLIENT SMOOTHLY)



THE COACHING MASTERS

FIRST SESSION ROADMAP

1. Welcome & Building Rapport (5-10 min)

Purpose: Create a comfortable, open space for the client.

Coach Says:

- Warm Welcome: “I’m so excited to have this first session with you! How are you feeling about starting this coaching journey?”
- Set a Safe Space: “This is a judgment-free space where you can be open and honest. Everything we discuss is confidential.”
- Icebreaker (Optional): If the client is nervous, start with a light question:
 - “What’s something that made you smile today?”
 - “What’s one thing you’re looking forward to this week?”

2. Explain the Coaching Process & Expectations (5 min)

Purpose: Set clear expectations about the coaching relationship.

Coach Says:

- What Coaching Is & Isn’t:
 - “Coaching is a partnership where I help you clarify your goals and take action toward them. I won’t tell you what to do, but I’ll help you find the best solutions for yourself.”
 - “This isn’t therapy or consulting—it’s about empowerment and action.”
- Session Structure Overview:
 - “Typically, our sessions will follow a structure: we’ll check in, identify a focus area, explore strategies, and create an action plan. Sound good?”
- Logistics:
 - “Sessions are [length of session] long, and we’ll meet [frequency]. Does this schedule work for you?”
 - “How do you prefer to track progress? (Notes, check-ins, journaling, etc.)”
 - “Do you prefer a direct approach, or do you like to reflect and process before taking action?”

FIRST SESSION ROADMAP

3. Explore the Client's Goals & Challenges (15-20 min)

Purpose: Get a clear picture of what the client wants to achieve.

Coach Says:

- Understanding Their Goals:
 - “What brought you to coaching? What do you hope to get out of this experience?”
 - “If we could fast-forward six months, what would success look like for you?”
 - “What’s the biggest challenge you’re currently facing in [life, business, health, etc.]?”
 - “On a scale of 1-10, how committed are you to making changes?”
- Exploring Their Current Situation:
 - “Tell me about what’s worked for you in the past when trying to reach this goal.”
 - “What has been holding you back from making progress?”
- Identify Core Themes:
 - Summarize key themes that come up:
 - “It sounds like you want to [goal] but feel stuck because of [challenge]. Does that resonate?”

4. Create an Initial Action Plan (10-15 min)

Purpose: Help the client feel empowered with a first step.

Coach Says:

- Identify Small Wins:
 - “What’s one small, achievable action step you can take this week?”
 - “What feels manageable given your current situation?”
- Accountability & Commitment:
 - “How will you hold yourself accountable to this step?”
 - “Would you like a mid-week check-in or prefer to self-monitor?”
- Obstacle Planning:
 - “What might get in the way of completing this step?”
 - “How will you navigate those obstacles?”

FIRST SESSION ROADMAP

5. Wrap-Up & Next Steps (5 min)

Purpose: End on a strong, motivating note.

Coach Says:

- Summarize the Session:
 - “Today, we clarified that your main focus is [goal] and that your next step is [action step]. Does that feel right?”
- Encourage Reflection:
 - “What’s your biggest takeaway from today’s session?”
- Set the Tone for Next Session:
 - “In our next session, we’ll check in on your progress and go deeper into [next topic based on today’s discussion].”
- Closing:
 - “I’m really excited to see what comes up for you this week. You’ve got this!”

Additional Tips for a Strong First Coaching Session:

- ✓ Listen more than you speak – aim for an 80/20 ratio where the client talks 80% of the time.
- ✓ Use reflective listening – paraphrase what the client says to show you understand.
- ✓ Make them feel safe & supported – avoid judgment and validate their experiences.
- ✓ Keep the first action step small – small wins create momentum.