

***Please note***:

*Adapt this form as needed for your clients. For 1:1 coaching, we suggest considering including sections for:*

* *What do I want to celebrate? (Please list at least 3 items).*
* *What actions have I taken since my last session?*
* *What inner shifts have happened? What is my inner wisdom telling me?*
* *Current opportunities in my life include . . .*
* *At my next coaching session, I want to focus our attention on . . .*

*The Pre-Session Progress Form is an opportunity for the client to practice reflection and celebration, take responsibility for their process and actions, get clear on the focus for the session, etc. The Form is very helpful for session preparation as it is a process for the client to share “story” and context prior to the session so that the session is as focused as possible.*

*As you onboard a new client, make time to introduce and review this form as well to highlight how it serves the client.*

**Pre-Session Progress Form Template**

*Please submit responses to <e-mail address> at least 24 hours before each coaching session.*

**Name: Date:**

**What is my BIG, Soul-Centered Goal for the next 12 months?**

**What are my current offerings? (Name, Format, Price)**

**What Marketing Actions Have I Taken This Month?**

**What was my last Major Marketing Moment? (Describe with date and results)**

**What are my next 2 planned Major Marketing Moments (date and describe)?**

**What do I want to celebrate since our last private session?**

**What action have I taken towards my goals since our last session?**

**What inner shifts have occurred/What is my inner wisdom telling me?**

**Growth Opportunities Available to You Right now:**

**I want to focus our attention during our next coaching session on:**