Coaching session note

Client | Date | Session no.

1. Brief context
What the client came with, key events.

2. Key themes and affect
Themes, feelings and body reactions named in the session.

3. Session agreement
The desired outcome in the client's final words and how they will know it worked.

4. Emotions and energy
How the client's state shifted and what it was linked to.

5. Awareness and new perspective
What the client now sees differently about the situation.

6. What the client learned about herself
A discovery about the self and the choice it shows up in.

7. Options
Options the client considered, chosen ones first, then the ones she turned down.

8. Progress toward the goal
What was done and what shifted inside, both if they came up.

9. Accountability
How the client will track progress herself, by when and what it serves.

10. Agreements and homework
Tasks and observations until the next session.

11. Risks
Only signals that came up. Empty if none.

12. Speech and thinking features
Anything notable in the form of speech. Usually empty.

13. Plan for the next session
What to return to.

Coaching session note: filled example

Client Anna, 34 (fictional) | Date 11/12 | Session no. 4

1. Brief context

Came in after a conflict with her manager, has slept badly for a week.

2. Key themes and affect

Tension → "my chest tightens before planning meetings".

3. Session agreement

Prepare for Monday's meeting in one evening → success: the report reviewed once.

4. Emotions and energy

Tense at the start → **energy up** when talking about free evenings, 4 to 7 out of 10.

5. Awareness and new perspective

"He asks about deadlines, not mistakes" → **less to prove** at the meeting.

6. What the client learned about herself

"I hold myself to a standard nobody asked for" → will ask what "good" means.

7. Options

Ask the manager what a good report looks like, a one-page checklist. Turned down: staying late.

8. Progress toward the goal

Sent the last report after two reviews → **more confident** speaking at the meeting.

9. Accountability

Counts reviews in a notes app → Friday check-in, for evenings with family.

10. Agreements and homework

One review of the report before Monday → note how long it took.

11. Risks

None mentioned.

12. Speech and thinking features

None noted.

13. Plan for the next session

Hear how the talk with the manager went, **review the checklist**.