COACH PRACTICE TOOL

First Coaching Session Agenda

Battle-tested 60-minute script for your first session with a new client. Adjust the timing for your style, but keep the order — establishing trust before diving into the numbers makes the rest of the engagement work.

0:00 – 0:05 **Welcome + housekeeping**

• Confirm recording (if any) and verbal consent.

• Restate confidentiality — what's said in session stays in session.

• Set expectations: this is your show, not mine; I'll ask a lot of questions.

0:05 – 0:15 **What brought you here**

• Let them talk first. Don't fix anything yet.

• Listen for: triggering event, prior attempts that failed, who's involved.

• Reflect back what you heard before moving on.

0:15 – 0:35 **Financial snapshot walkthrough**

• Open their intake form (or fill one out together if they didn't pre-fill).

• Numbers first: income, debts, savings, retirement.

• Pause to verify each number — clients often guess.

• Ask: what surprised you about saying these out loud?

0:35 – 0:50 **Top three priorities**

• From their goals + the snapshot, propose three coaching priorities.

• Get specific: "pay off the $8,400 credit card balance by August" beats "get out of debt."

• Confirm the ordering with the client. Their first priority drives session 2's homework.

0:50 – 0:55 **Homework + cadence**

• Connect their bank via Plaid in Compound (5 minutes, do it together if needed).

• One small action this week — usually a budget setup or a transaction review.

• Confirm the next session date and what they'll bring.

0:55 – 1:00 **Close**

• Recap the three priorities and the one homework item.

• Ask: "What's the question you didn't get to ask today?"

• End on a forward-looking note: "Here's what next session looks like."

Post-session checklist (5 minutes)

- ■ Open Compound, add the three priorities as session notes (coach-private).
- ■ Send the client a 1-paragraph recap email within 24 hours.
- ■ Schedule next session before you close the laptop.