

COACHING CHECKLIST

Preparing the Space

- The physical/virtual environment is free from distractions
- Notifications and devices are silenced or turned off
- Required materials are accessible (note-taking tools, resources)
- The space feels comfortable and conducive to open conversation
- There is privacy for confidential discussion
- The seating arrangement promotes equal partnership
- The lighting and temperature are comfortable

Session Summary:

Primary Focus Areas:

Key Action Items:

1.

2.

3.

Follow-up date:

Notes for Next Session:

Logistics

Session Details:

Date:

 Time:

Location: ☐ Virtual ☐ In-person

Platform/Venue:

Coachee:
