

The first time you meet a client your focus is on establishing rapport and connection, understanding the client and that they hope to achieve from coaching

You will:

- Introduce yourself and your expertise
- Explain the role of a health coach, the coaching approach and process.
- Discuss participant and coach expectations
- Clarify what brings them to coaching and what they hope to achieve

Key skills: the OARS!

Discovery call:

If you work in private practice it is common to do a discovery call where you cover most of the introduction and determine the client's suitability for coaching as well as whether you feel mutually compatible. A Discovery call demonstrates your values and explains your approach as a Coach. As it is pre-engagement you are also marketing yourself and your skills.

(Introduction)

Today we'll talk about what brings you here and what you'd like to achieve by working with a coach... Before we start is there anything you would like to know about me?

As a health coach I'm trained to help you with healthy eating, increasing physical activity and managing your lifestyle so you can be the healthiest version of yourself.

I became a health coach because I've always been passionate about helping people become their best self. Personally I've always been interested in nutrition and health and I know how hard it can be to change behaviour, and I really enjoy supporting others through the process.

(Clarify the client's general goal- reason for attending)

Tell me a bit about you?

What brings you here today?



What's led to you wanting to change in this area?

(Clarify expectations)

What do you hope to get out of working with a coach?

Have you worked with a coach before? What was that experience like?"

(Coaching approach)

As this is our first meeting I like to explain the coaching approach works and lay the foundation of how we will work together.

Health coaching is a partnership between a client and a coach. It is based on the belief that you are the expert in your life and know what is best for you, as well as what will suit your lifestyle. It's not my job to decide what area of health you should change or tell you what you need to do to change your behaviour. You choose the area of health that is important and my role as a health coach is to support you in achieving your health dreams. Essentially we will work on a plan together to help you change habits or behaviours that are important to you.

We take a holistic approach as we recognise that nutrition movement and lifestyle are interconnected - you can't change one without considering the others.

(Coach expectation of client)

My expectation of you is that you are willing to be in the driver's seat. This means choosing the y yourself we can work that out together. I will support you to make changes at a pace you feel comfortable with and come up with ways you can keep yourself accountable so the changes stick.

It is also really important that you know that whatever is said here remains confidential, I want this to be a place that you can express yourself honestly and know that you won't be judged, or pushed into making changes that you're not ready for.

(Coaching as a process, not a one-off appointment)



Some other important things to note includes that coaching is a process. We don't do single sessions as we know that doesn't work because change doesn't happen overnight! In fact the process of change is a journey. There are a number of steps and different stages, tools and approaches. By supporting you over a period of 3/6/12 month period we know we can help you make sustainable changes.

In the initial session I'll learn about you, discuss your expectations, clarify role of health coach and client and explain the health coaching process. We'll work on an inspiring health vision that you're excited about achieving. You'll choose the area that you want to work on first to make this a reality, and set some goals.

How does that sound?

(Coaching agreement)

After you have determined that the client would like to proceed you will discuss the coaching agreement and logistics:

- Schedule
- Appointments
- Fees and payments
- Agreements/contracts
- Ways to meet - phone/in-person/online
- Length of sessions



Example 2 - Shivaun's introduction

I'm Shivaun Conn, health coach and dietitian, have you any experience with dietitians, health coaches or coaching previously?

Where I differ is... or would you like me to explain my approach as a dietitian/health coach?

The dietitian side is where I will bring in evidence based nutrition information tailored to you – the 'what' and the coaching side is about implementation, 'the how'.

Coaching is a collaborative approach where you are respected as the expert in your own life and we will work together to help you create a vision of where you would like to be and goals you would like to achieve.

You will drive the process, with what you want to achieve, how and at what pace and I'll be here to support you where needed.

Coaching is about creating sustained health change, understanding how your behaviours and habits are created, how to change unhealthy behaviours and form new healthy habits that can be sustained long term.

Through the coaching process we will nurture a mindset of curiosity, growth, kindness, compassion where you learn about yourself, why you do what you do, and where even if things don't go to plan you just gently observe the reasons why and consider what you could try next time.

What are your expectations of working with me? Or.. How would you like to be supported? – clarify what is possible and how you work.

What would you like to get out of this consultation? What would you like to achieve in the 3, 6, 12 months together? – clarify what is possible and ensure expectations are realistic.