

<b>What is this?</b>	An overview and checklist to help you prepare for the first coaching session of a new assignment.
<b>What does it do?</b>	<ul style="list-style-type: none"> <li>• Helps you think about what you need to focus on.</li> <li>• Helps you plan your approach.</li> <li>• Helps you feel comfortable about the session.</li> </ul>
<b>When might I use it?</b>	<ul style="list-style-type: none"> <li>• When beginning a new coaching relationship.</li> <li>• When you're less sure about how to handle the initial stages of a conversation.</li> <li>• When you want to remind yourself of the principles of a first session.</li> </ul>

### Why consider this?

Any conversation with a new coachee is more effective with a firm foundation of preparation. So, a little advance thought and planning will help set you up for success. For example, consider:

- What seems important to do well during this first session?
- How will I know that the session has been a success?
- What might stop the session from going well?
- What do I want the coachee's experience to be?
- What simple principle or belief do I want to remember during the session?

### Key elements of the conversation:

#### 1. Relax the conversation, build rapport

Introduce yourself if necessary, i.e. if you've not met before; lighten the situation by discussing something familiar and easy for your coachee, e.g. something about the company, their colleagues, maybe your journey or the physical environment you are in. Make sure to notice their pace, their energy and match that in some way. In particular, don't rush this, take the time to connect and ensure that they're comfortable.

#### 2. Check that your coachee is orientated to the conversation

Make sure they've had all the information they need as background, e.g. 'Did you have a chance to read the Coaching Overview document – was that helpful?' List the main objectives of the session, e.g. to understand them, their background and the initial themes for coaching. Explain what's going to happen in this first session, e.g. 'So, I'm hoping to spend the first part of the session getting to know a little more about you and what you'd like to get out of coaching – is that okay?'. Give them the opportunity to add anything they need to, e.g. 'What would you like to get from this?'

#### 3. Get to know them



### Start a first session

Record some basic, personal details down (where they live, if they have a partner, children, etc.), e.g. 'Can I ask you a few basic facts, so I know a little more about you?' This is an obvious place to create some easy conversation, e.g. by taking a genuine interest in what they're telling you, asking about their home life, etc.

#### 4. Explore what they'd like to get from the coaching

If some of these goals are already known, then acknowledge this, e.g. 'You mentioned previously that you'd like to focus on developing better influence, could you perhaps tell me some more about that?'. If no goals have been discussed, start with something gentle like 'What kinds of things were you thinking of working on?'.  
Sometimes the coachee either doesn't know or isn't comfortable to discuss goals yet. In this instance, simply have a general discussion, e.g. 'Perhaps begin by telling me a little more about yourself' or, 'Okay, can you tell me a little more about your current situation and challenges?'.  
5. Focus on coaching principles and behaviours

Once you've found something that they are comfortable discussing, that's it, you're off! You can then use all your skills of listening, questioning, observation and feedback to begin to support them. Use the Coaching Path (as explained in The Coaching Manual) to support you as you facilitate them through the conversation. Remember:

#### 5. Focus on coaching principles and behaviours

Once you've found something that they are comfortable discussing, that's it, you're off! You can then use all your skills of listening, questioning, observation and feedback to begin to support them. Use the Coaching Path (as explained in The Coaching Manual) to support you as you facilitate them through the conversation. Remember:

- Relax (them and you), take time to build a sense of comfort and trust
- Ensure they are appropriately aware, e.g. what to expect from coaching
- Get to know them more fully, e.g. their personal and professional background
- Confirm or explore their goals for coaching
- Begin to coach them, e.g. use core principles, beliefs and The Coaching Path

#### Additional support & reading, by Julie Starr

- The Coaching Manual
- Brilliant Coaching
- The Mentoring Manual

For more information and free downloads, go to [www.starrcoaching.co.uk](http://www.starrcoaching.co.uk)