BOON

Boon Session Checklist

Client's 1st Session

- **Pre-Session**
  - ☐ Review client's Welcome Survey which was emailed to you
    If you didn't receive a welcome survey, please email coachsupport@boon-health.com in advance of the session
  - ☐ Take note, am I working with a client who has unlimited sessions (NO MAX) or a Session Cap? (We typically schedule bi-weekly, in 6 sessions increments)
  - ☐ Review Session 1 Script
    Remember to make this your own! The primary goal of the first session is to establish trust and rapport
  - ☐ Ensure I'm logged into my Boon Zoom account
    As the host of the meeting, no other Zoom login will work to connect with your client
  - ☐ Center myself and initiate the Zoom call

- **During Session (30-minutes on Zoom)**
  - ☐ Introductions & Expectation Setting, including Confidentiality (read verbatim)
  - ☐ Client Concerns/Challenges & Goal Setting
  - ☐ Determine/Schedule the next 5 Sessions (click to view 5 minute video demo)
    - ☐ Explain to clients that they will receive an email about upcoming sessions; they have to add the sessions to their calendar by clicking the "add to cal" button or by manually adding to their calendar
- **Post Session**
  - ☐ In Salesforce: Label the session ("completed," "client no-show," or "coach no-show") - see how in FAQs
    If client no-show, follow these steps
  - ☐ In Salesforce: Complete Session Notes in Salesforce (including **themes, goal, obstacles, plan**) - click SAVE!
  - ☐ Email client to thank them for meeting & recap anything important
  - ☐ Schedule the future sessions in Salesforce if you didn't do so during the call itself

Subsequent Sessions

- **Pre-Session**
  - ☐ Review notes from last time
  - ☐ Take note of what # session we're on (Do you need to schedule more sessions? Is their 6th Session Touchpoint approaching? Are they becoming a Self-Pay client?)
  - ☐ Be sure you're logged into your Boon Zoom account, center yourself & initiate the call

- **During Session**
  - ☐ Coach!

- **Post Session**
  - ☐ Label the session (completed, client no-show, or coach no-show)

——--

Please take a look at Boon's FAQs
For tips on getting and staying organized as a Boon Coach, see this article!
Need support? Email coachsupport@boon-health.com

- [ ] Complete Session Notes (including **themes, goal, obstacles, plan**) - click SAVE!
- [ ] Draft email for " between session" communication; schedule to be sent 1 week later
- [ ] Schedule any future sessions if applicable

Example of filling out Session Notes in Acuity:

—--

Please take a look at Boon's FAQs

For tips on getting and staying organized as a Boon Coach, see this article!

Need support? Email coachsupport@boon-health.com

Close | Save | Cancel Editing

SESSION NOTES. Please select the most common THEMES from this coaching session. Select up to a maximum of 3 themes. (internal use only)

MENTAL WELL-BEING

- [ ] Stress management
- [ ] Burnout
- [ ] Resilience
- [ ] Anxiety
- [ ] Depression

LEADERSHIP & MANAGEMENT SKILLS

- [ ] Time management and productivity
- [ ] Troubleshooting / Problem-solving
- [x] Career development
- [ ] Leading through change
- [ ] Motivating teams
- [ ] Managing vs mentoring
- [ ] Equity & Inclusion

COMMUNICATION SKILLS

- [ ] Communicating boundaries
- [ ] Conflict resolution
- [ ] Engaging in difficult conversations
- [x] Public speaking / Presentation skills
- [ ] Written communication

OTHER

**GOALS (I.E., WHAT ARE THE CLIENT'S DESIRED OUTCOMES?)

- To feel more confident about self
- Become more comfortable presenting, speaking in front of a group

**OBSTACLES

- [ ] Procrastination
- [ ] Lack of motivation or focus
- [x] Lack of enjoyment / Enthusiasm for work
- [ ] Lack of authority
- [ ] Lack of management / Leadership support
- [ ] Lack of time
- [ ] Difficult team members or employees
- [ ] Finances

**PLAN (I.E., WHAT DOES THE CLIENT COMMIT TO WORK ON IN BETWEEN SESSIONS?)

- In prep of next Thursday's presentation
1) practice in front of Sally on Monday
2) take 3 deep breaths before starting the zoom call

ADDITIONAL NOTES

- We started the session by centering/taking a few deep breaths - that felt good and helped client feel relaxed. Sparked the idea for taking 3 deep breaths before the presentation

—---

Please take a look at Boon's FAQs
For tips on getting and staying organized as a Boon Coach, see this article!
Need support? Email coachsupport@boon-health.com