

NEW CLIENT CHECKLIST

Client Name _____ Date _____

_____ Complete Client Information

_____ Complete Payment Plan

_____ Complete Coaching Agreement

_____ Send thank you card by mail after first session. Include a couple of business cards for referrals.

_____ Send thank you email with outline of session and action plan after every session. Include a reminder of your next session date and time.

_____ Ask for testimonial

_____ Add to database/email list

_____ Send birthday card, mark calendar two weeks in advance. Birthdate _____