



Coaching Plan Template

A professional, structured plan for any coaching engagement

Coaching Plan

Coach Name

Your name

Client Name

Client name

Coaching Period

Start date → End date

Program Length

e.g. 3 months / 6 sessions / 12 weeks

Session Format

Video call / Phone / In-person

Platform

Zoom, Google Meet, etc.

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Section 1: Client Background

Client Overview

2–3 sentences about who this client is — their role, life stage, or context relevant to the coaching engagement

Why They Came to Coaching

What brought them here? The pain point or opportunity they want to address

Previous Coaching or Development Experience

Any prior coaching, therapy, or personal development work — helps calibrate depth and vocabulary

Section 2: Goals

Primary Goal

The main outcome the client wants to achieve by the end of this engagement

Success looks like:

Describe what success means concretely — observable, specific

Secondary Goal (if applicable)

A supporting or secondary outcome

Success looks like:

Describe what success means concretely

SMART Goal Check — confirm for each goal above

Specific Is the goal clearly defined?

Measurable How will you know it's achieved?

Achievable Is it realistic in the timeframe?

Relevant Does it connect to the client's bigger picture?

Time-bound Is there a clear deadline?

Section 3: Milestones

Break the primary goal into 3–5 smaller milestones. What needs to happen by when?

Milestone	Target Date	Status
<i>Milestone 1</i>	<i>Date</i>	Not started
<i>Milestone 2</i>	<i>Date</i>	Not started
<i>Milestone 3</i>	<i>Date</i>	Not started
<i>Milestone 4 — optional</i>	<i>Date</i>	Not started
<i>Milestone 5 — optional</i>	<i>Date</i>	Not started

Section 4: Session Schedule

Session Frequency

Weekly / Bi-weekly / Monthly

Session Duration

45 minutes / 60 minutes / 90 minutes

Preferred Day/Time

e.g. Tuesdays at 10am ET

Session Calendar

Session #	Date	Focus Area	Notes
Session 1	<i>Date</i>	Onboarding + goal-setting	
Session 2	<i>Date</i>	<i>Focus</i>	
Session 3	<i>Date</i>	<i>Focus</i>	
Session 4	<i>Date</i>	Mid-point check-in	
Session 5	<i>Date</i>	<i>Focus</i>	
Session 6	<i>Date</i>	Wrap-up + next steps	

Adjust session count for your program length.

Section 5: Client Responsibilities

What does the client commit to between sessions?

Between-Session Actions

- *Action 1 — e.g. "Complete the weekly reflection worksheet"*
- *Action 2 — e.g. "Practice the habit we agreed on for at least 3 days"*
- *Action 3 — e.g. "Journal for 10 minutes before each session"*

Communication Agreement

Response time for messages

e.g. "I'll respond to emails within 48 hours"

Between-session contact

Allowed / Not included / Voxer only / etc.

Cancellation policy

e.g. "24-hour notice required to reschedule"

Client's Commitment Statement

"I commit to [specific commitment the client makes verbally or in writing at intake]."

Section 6: Accountability Check-Ins

Check-in Method

Weekly Voxer voice note / Email update / Form submission / None

Check-in Frequency

Weekly / After each milestone / Monthly

Review Dates

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Review	Date	Purpose
Mid-point review	<i>Date</i>	Assess milestone progress, adjust plan if needed
Final review	<i>Date</i>	Evaluate goal achievement, celebrate wins

Section 7: Coaching Tools & Resources

Tools, worksheets, or resources you plan to use in this engagement:

Resource	Purpose	When Used
<i>e.g. Values Clarification Exercise</i>	<i>Identify core values</i>	<i>Session 1</i>
<i>e.g. Wheel of Life Assessment</i>	<i>Baseline assessment</i>	<i>Session 1</i>
<i>e.g. Weekly Reflection Sheet</i>	<i>Between-session accountability</i>	<i>Sessions 2–6</i>
<i>Custom worksheet or resource</i>	<i>Purpose</i>	<i>Session</i>

Section 8: Success Metrics & Completion Criteria

How will we know the coaching engagement was successful?

Objective measures (if applicable)

e.g. "Client lands 3 new clients within 90 days"

e.g. "Client completes first public speaking engagement"

Subjective measures

e.g. "Client reports feeling confident making business decisions independently"

e.g. "Client can articulate their personal values and uses them to guide choices"

Completion Criteria

What does "done" look like? What needs to be true for both coach and client to feel the engagement is complete?

Section 9: Follow-Up Plan

Post-Engagement Check-in

Date — Format: email / 30-minute call / none

Referral or Continuation Options

If applicable

Alumni Resources

Any ongoing community, newsletter, or support you offer

Notes

Use this space for anything that doesn't fit the sections above — context that's useful to have on record.

Free-form notes