Template Content Spec: Sample Coaching Session Script & Planner

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For: Downloadable PDF + Google Doc **Accompanying post:** https://paperbell.com/blog/coaching-sample-session/ **Batch:** batch-2026-05-07

Document Identity

Title: Sample Coaching Session — Free Template & Planner from Paperbell **Subtitle:** Your step-by-step guide to running a sample session that books paying clients **Format:** One-page-per-section, printable, fillable prompts throughout **Branding:** Paperbell colors (navy + coral), logo in header, "paperbell.com" in footer on each page

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Cover Page

Title: Sample Coaching Session Script & Planner **Subtitle:** A step-by-step framework for coaches running free or low-cost introductory sessions **Brief intro (2-3 sentences):** A sample session is your best chance to show a potential client what coaching with you actually feels like — and to help them decide whether they want more. This planner walks you through every phase of a 50-minute session: what to do before, what to say during, and what to send after.

How to use: Fill in the client fields before each session. Use the question prompts as a starting point, not a script. After the call, complete the post-session checklist.

Footer on cover: Made for coaches by Paperbell — the all-in-one coaching practice tool. Try it free at paperbell.com

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Section 1: Pre-Session Prep

Why: The session starts before the call. Clients who arrive prepared go deeper faster — which means they walk away with more value and a stronger impression of your coaching.

Fields to complete:

- Client name: ___
- Session date + time: ___
- Video/call link sent? [ ] Yes
- Intake form sent? [ ] Yes / [ ] Not applicable

Pre-session email checklist: - [ ] Warm welcome + what to expect on the call - [ ] Reflection prompt: "What would you most like to get from our time together?" - [ ] Video link or call-in number - [ ] Brief note about your coaching programs (so it's not a surprise at the end)

My notes from any pre-session intake:

One goal I have for this client coming out of the session:

Section 2: Opening — Rapport Building (5 minutes)

Why: New clients arrive with nerves. A genuine warm-up creates the psychological safety needed for real coaching work. Rushing past this costs you quality in every phase that follows.

Suggested opening questions (choose 1-2): - "How are you feeling going into today's call?" - "What's one thing that's gone well for you recently?" - "Before we dive in — is there anything you want me to know about where you're at today?"

My go-to opening question:

Notes from the opening:

Section 3: Discovery — Goal Setting (10 minutes)

Why: Without a clear session goal, the conversation wanders. A defined focus gives the client something to walk away having actually made progress on — even in a single session.

Suggested goal-setting questions (choose 1-2): - "What would you most like to focus on today?" - "When you say [their answer], what does 'better' actually look like for you?" - "By the end of this call, what would make you feel like this was time well spent?"

Session goal we agreed on:

Connection to their longer-term aspiration:

Section 4: Mini-Coaching — Exploration (30 minutes)

Why: This is where the real coaching happens. Your job is to help the client see something about their situation they couldn't see before. You're not there to give answers — you're there to ask better questions.

Question types to cycle through:

Question Type	Purpose	Example
Awareness	Surface a pattern	"What do you notice about how you respond when this happens?"
Widening	Expand context	"Where else does this show up in your life?"
Foundation	Reveal belief	"What's the belief underneath that?"
Forward	Open possibility	"What would you do if you

Question Type	Purpose	Example
		weren't afraid?"
Commitment	Gauge readiness	"On a scale of 1-10, how motivated are you to change this?"

3-5 questions I want to explore with this client: 1. __ *2.* __ 3. __ *4.* __ 5. ___

Key insights or breakthroughs that came up:

What shifted for them during the session:

Section 5: Recap — Commitment & Action Step (10 minutes)

Why: Insight without action fades. A clear, specific commitment made on the call (not "think about it") gives the client proof that coaching produces results. The confidence-scale technique surfaces the next obstacle while momentum is high.

Questions for the action planning phase: - "Based on what we talked about, what's one concrete step you could take this week?" - "How confident are you in that, on a scale of 1-10?" - "What would bring that number up by 2 points?" - "What's the first thing you'll do right after this call?"

Their committed action step:

Confidence rating: ___ / 10

What would raise the confidence score:

Their biggest takeaway from the session (their words):

Section 6: Pitch — Inviting Them Into Paid Coaching (5 minutes)

Why: If the coaching would genuinely help this person, they deserve to know what continued work looks like. This isn't a sales tactic — it's service. A brief, honest conversation about your programs is the natural close to a strong session.

A low-pressure way to open this: "I'd love to share a bit about how I work with clients long-term. Would that be okay?"

My program options to mention:

Program	Length	What it includes	Investment
___	___ sessions	___	$_____
___	___ sessions	___	$_____

How I describe the transformation (1-2 sentences, in my words):

Next step I'll offer them: - [ ] Book a follow-up call (link: __) - *[ ] Review my packages page (link:* __) - [ ] Reply to my follow-up email

Their response / what they said:

Section 7: Post-Session Protocol

Why: The 24 hours after the session are when clients make their decision. A warm, specific follow-up email keeps the momentum alive and makes it easy for them to take the next step.

Post-session checklist: - [ ] Send follow-up email within 24 hours - [ ] Include a specific highlight from the session (something they said or realized) - [ ] Remind them of their action step - [ ] Include a clear next step with a link (book now, review packages) - [ ] Add a soft deadline: "I'm holding your spot until [date]" - [ ] Add session notes to their client file (in Paperbell or your notes system)

Follow-up email — my notes:

Subject line: ___

Opening (specific highlight from their session):

Action step reminder:

Next step + link:

Soft deadline:

Section 8: Client Reflection Worksheet (Optional — Send in Advance or During Session)

Purpose: The client completes this during the session or receives it ahead of time. Helps them arrive prepared and gives you material to work with.

Instructions for client: Take 5-10 minutes to answer these before our call. There are no right or wrong answers — just whatever comes to mind.

What's going well in your life or work right now?

What's the biggest challenge or frustration you're dealing with?

What would you most like to feel or experience differently?

What have you already tried? What hasn't worked?

If coaching went really well, what would be different for you 3 months from now?

Is there anything else you'd like me to know before we talk?

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