



Client Coaching Plan Template

An 8-step framework for building a clear, flexible coaching plan with any client.

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How to Use This Template

Fill this out together with your client during your first session or shortly after, then revisit it at each check-in to track progress and adjust as needed. Work through the eight steps in order: they build on each other, from setting the goal to staying flexible when things change. Keep a copy in each client's file and update it as the engagement evolves.

Step 1: Define Clear Goals

Write the goal in specific, measurable terms so both of you know what success looks like.

Goal statement: _____

Specific (what exactly will change): _____

Measurable (how you'll know it's working): _____

Achievable (why this is realistic in the timeframe): _____

Relevant (why this matters to the client right now): _____

Time-bound (target completion date): _____

Step 2: Assess the Current Situation

Get an honest picture of where the client stands today before mapping the path forward.

Strengths: _____

Weaknesses or gaps: _____

Challenges: _____

Opportunities: _____

Step 3: Establish Strategies

Decide on the overall approach and methods you will use to reach the goal.

Coaching approach or methods: _____

Why this approach fits this client: _____

Step 4: Break Down Action Steps

List the specific, actionable tasks that move the client toward the goal.

Action step 1: _____

Action step 2: _____

Action step 3: _____

Action step 4: _____

Action step 5: _____

Step 5: Set Milestones

Set checkpoints along the way to assess progress before the final goal date.

Milestone 1: _____ Target date: _____

Milestone 2: _____ Target date: _____

Milestone 3: _____ Target date: _____

Step 6: Determine the Timeline

Map out the timeframe for the plan as a whole and for each milestone.

Start date: _____

End date: _____

Check-in frequency: _____

Step 7: Identify Resources

Note the materials, tools, or training the client will need along the way.

Resources or tools needed: _____

Support needed from others: _____

Step 8: Remain Flexible

Plans change. Use this space to log adjustments as the engagement progresses, so the plan stays a living document rather than something filled in once and forgotten.

Adjustment log:

Date: _____ What changed: _____

Date: _____ What changed: _____

Date: _____ What changed: _____