

C O A C H M O D E L

COACHING TOPIC: _____

Directions: In your coaching conversation, you may find it helpful to refer to this form and take some notes to keep you focused as you learn to move through this model. Ask the client for permission to take notes during the conversation.

C = Client-driven goal setting. What is the client's goal?

- What is your vision?
- What do you want to achieve?
- Where do you want to be?

O = Ongoing assessment of current situation. What is the client's current situation?

- Where are you now in the context of your financial goal?
- What have you already done?
- What are your strengths?
- What are your challenges?
- How satisfied are you in the financial areas that affect your financial goal?
- What's important to you that will drive your decisions and actions?

A = Action planning. What steps will the client take to get from here to there?

- How will you get from where you are now to where you want to be?
- What do you think needs to be changed to reach your goal?
- What opportunities exist?
- What options do you see as open?
- Where might you get stuck?
- What's going to help you be successful?
- What next steps will you commit to take?

CH = Checking. What mechanisms will keep the client on track?

- What will you do by when?
- How will you let me know that you've done it?

Adapted from Financial Coaching Training Manual by a collaboration of Central New Mexico Community College and New Mexico Project for Financial Literacy, 2010.

C O A CH MODEL – Practice

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