

# INITIAL COACHING SESSION: DEVELOPING A PERSONALIZED HEALTH PLAN

Patient Name:

Date:

Number of Healthy Days:

## THE VISION AND GOALS:

What do you live for? What matters to you? Why do you want to be healthy?

### Additional Questions/Considerations to facilitate exploration:

- Tell me about times in your life when you felt your best... prompt for daily activities, perceived energy, family, social, work, special occasions or events
- When you are not feeling well, what drops off? What don't you do? What gets cut from your to-do list? What do you miss or miss out on?
- Who are the important people in your life? What do you like to do with them? For them?
- What do you value? What are your values?
- How might making lifestyle/health/wellness changes help you reach your vision?

## OBSTACLES, NEEDS AND CHALLENGES:

What is getting in the way of you achieving your goal(s)?

### Additional Questions/Considerations to facilitate exploration:

From the answers to Hope Note questions, prompt for more detail about Body & External, Behavior & Lifestyle, Social & Emotional, Spiritual & Mental, and Social Determinants of Health factors identified. Rather than re-asking the questions, ask follow-up questions to elaborate on:

- Symptoms or physical limitations
- Environmental factors
- Need for skills development
- Lack of resources
- Need for assistance / supports
- Problems in behavior or habits
- Challenges in activities of daily living
- Threats to basic health and safety
- Stigma – self-imposed and/or external
- Limiting beliefs or “rules”

Which of these should we address first? (*up to three*)

## STRENGTHS – FACTORS IN YOUR FAVOR:

What skills, attributes, resources, interests and connections might be leveraged to overcome Obstacles to achieving Goals?

### Additional Questions/Considerations to facilitate exploration:

- What are you interested in?
- What do you do for fun?
- What are you good at? What comes easily/naturally to you?
- Who is “in your corner” or “has your back?”
- Who can you turn to in a crisis?
- Who can you rely on when you need a distraction from your troubles?
- What has worked for you in the past? Or what has helped you make the progress you've made so far?
- Who might be excited to hear about what you're working on?
- How can identified strengths be leveraged to overcome obstacles to achieving goals? How can we make strengths relevant to the work?

### STEPS ALONG THE PATH:

How can we break big-picture goals into smaller steps? To address 1-3 obstacles identified above, what resources can we access, skills can we develop, practices can we try, and contacts can we make to make progress towards goals?

Put in SMART (*Simple Measurable Action-oriented Realistic Time-framed*) format.

#### Additional Questions/Considerations to facilitate exploration:

- In looking at all of the obstacles identified above, can we think strategically? What might need to be handled first? Where might progress in one area get us a head start on others?
- Refer to the Solutions List and your organization's resources lists for ideas to propose and evaluate with patients.
- Are there steps, referral processes, documentation, costs that need to be considered/addressed to refer to certain resources?
- Since we know not every step (activity, treatment, intervention) works for every person, how will we assess whether what is being tried is fully successful, needs minor adjustments, or needs fuller course corrections or transition to Plan B?
- If there are multiple steps needed, pick 1-3 for immediate attention and maintain a list of next-steps below, so as not to spread current efforts and resources too thin.
- Use SMART formatting.

### HEALING JOURNEY ALLIES AND/OR PARTNERS:

Who can help you along the way? What professional resources and supporters can provide services, information and education? What personal contacts (friends, family, connections) will help you stay motivated, assist with accountability/tracking progress, and/or help you feel connected as you take Steps along the Path?

#### Additional Questions/Considerations to facilitate exploration:

- Who's got your back? Connect to resources in the Strengths section above.
- Can different people in your life have their own roles in supporting different elements of your journey? How can we play to your allies' strengths?
- What resources or contacts can we set connect you with?

### THE PARKING LOT:

Once we make progress on the Incremental Steps to overcome Obstacles and make progress towards goals above, what might we need to reassess or revisit? What next-steps should we keep in mind?

#### Additional Questions/Considerations to facilitate exploration:

- Use this list as an opportunity to remind people with a lot of goals or perceived obstacles that setting priorities means we'll get to these items more efficiently and that writing them down means things they've identified as important won't get lost.

### NAVIGATION AND/OR COACHING NEEDS:

Navigation - appointments, information, connections

Coaching - tracking, methods for accountability, problem-solving, identifying next steps

#### Additional Questions/Considerations to facilitate exploration:

At the end of every meeting note your Action Items (to-do list) as the Navigator/Coach supporting the work on the plan. Just like the patients Steps Along The Path, these should be clear, concrete and measurable. Note what you will do, and what they will do. Continuing support may include:

1. Patient Education
2. Health coaching
3. Bridging treatments
4. Group visits
5. Team visits
6. Technology assists
7. Referrals