

# 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?

## OBSTACLES, NEEDS AND CHALLENGES:

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

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?

**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.

**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?

**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?

**NAVIGATION AND/OR COACHING NEEDS:**

Navigation - appointments, information, connections

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