

# Coach Introduction Worksheet

This worksheet will help you create a script and plan for introducing yourself as a health coach and engaging potential clients around your offerings and coaching services. Use language that feels authentic to you, is understandable for the client and offers a person-centered, positive experience.

Approach: Introduce yourself, mention time and ask permission to talk with them about your coaching.

Create a short “I help statement” (2–5 sentences) to frame your coaching role and describe how you help.

Offer a strategic open-ended question to spark a conversation about what is important to the individual about their well-being and key challenges. This elevates the interaction into an experience that feels person-centered, relational and like a taste of coaching. Think of two or three appropriate questions that would work for different people and populations. (Ex. “What is important to you about your health and well-being?” “What is standing out as most important to you about your health these days?”)

As they share, listen actively and use reflections and affirmations as you would in a coaching session to further understand their challenges and help them feel heard and understood. Remember topics of interest and areas of importance that come up for them. Remembering personal details for follow-up conversations is key in relationship building.

Based on what you heard and understood, offer a brief explanation of how coaching works, how your program is structured, and how partnering with you will support their goals and intentions and help them overcome their obstacles. (Incorporate words and coaching concepts like partnership, collaboration, you are the expert, I am the guide on the side, etc.)



Check in for questions and a takeaway as you wrap up the conversation with phrases such as, “What are you thinking after our conversation?” “What are your thoughts?” “What are your thoughts and questions about coaching?” The individual’s takeaway from the interaction often provides valuable insight into how effective your coach introduction was and their understanding about the value of health coaching.

Use “follow-up” language to ask permission to secure a future interaction or referral. If they’re not immediately interested, ask them if they have any friends or people in their network who you could connect with about your coaching.

