

Checklist for Competency 3

Establishes and Maintains Agreements



Coaching Observation Checklist – Competency 3: Establishes and Maintains Agreements

Instructions

- Mark (✓) if **demonstrated**
- Mark (X) if **missing**
- Use **comments** for additional observations

1. Establishing the Session Agreement

Observation Item	✓ / X	Notes
Coach explicitly asks the client what they want to focus on for the session (<i>Does not assume, suggests, or skips this step</i>)		
Coach helps the client refine the session focus if it is vague or unclear (<i>e.g., asks clarifying questions to make it more specific, meaningful, and actionable</i>)		
Coach explores what success looks like for the client in the session (<i>e.g., "What would be a meaningful outcome for you today?"</i>)		
Coach checks for underlying needs, emotions, or complexities related to the topic (<i>Does not just accept the first topic at face value</i>)		
Coach confirms and summarizes the agreement before moving forward (<i>Ensures mutual understanding of focus and desired outcome</i>)		

2. Revisiting, Clarifying, and Adapting the Agreement Mid-Session

Observation Item	✓ / X	Notes
Coach notices if the client shifts focus and checks if they want to adjust the agreement (<i>Instead of continuing without acknowledging the shift</i>)		
Coach checks if the agreement still aligns with the client's needs as the session unfolds (<i>Rather than rigidly sticking to the original agreement</i>)		

Coach acknowledges when a new topic emerges and asks if they want to pursue it or return to the original focus		
Coach actively listens for underlying themes and helps the client connect them to the agreement <i>(Rather than just following surface-level content)</i>		

3. Common Mistakes That Interfere with Effective Agreements

Common Mistake	✓ / ✗	Notes
Coach assumes what the client means without verifying <i>(e.g., fills in meaning based on their own assumptions instead of asking the client to clarify)</i>		
Coach listens from their own bias or filters, influencing how they frame the agreement <i>(Instead of staying curious and neutral)</i>		
Coach does not explore potential complexities, limiting the client's self-discovery <i>(E.g., does not ask what might get in the way, what deeper values are at play, or what success truly means to them)</i>		
Coach does not adjust the agreement when the client drifts off-topic <i>(Misses opportunities to refocus the session or check if the new direction is more valuable)</i>		
Coach drives the session toward their own perception of what should be addressed <i>(Rather than ensuring the session is client-led and responsive to their needs)</i>		

Final Observer Notes

- **Overall strengths in establishing and maintaining the agreement:**

- **Opportunities for improvement:**

About This Checklist: This checklist includes **PCC Markers**, **additional indicators**, and **common coaching mistakes** that interfere with effective agreement setting. Each item includes a brief **description to help the observer** understand what to look for.