

Atlas Coaching Goals & Action Plan

Personal Development | Professional Growth | Leadership | Wellness

Client Name: _____

Date Initiated: _____

Review Date: _____

1. Coaching Focus & Priorities

Primary Coaching Focus (Select All That Apply)

- ☐ Personal Development & Growth
- ☐ Professional Development & Career
- ☐ Leadership & Supervision
- ☐ Wellness & Resilience
- ☐ First Responder & Occupational Wellness
- ☐ Communication & Relationship Skills
- ☐ Life Transitions & Goal Setting
- ☐ Other: _____

Primary Reason for Seeking Coaching:

What would you most like to accomplish through coaching?

2. Strengths, Resources & Opportunities

Personal or Professional Strengths:

Identify existing strengths, skills, experiences, and qualities that may support progress toward your goals.

Available Resources & Support Systems:

Identify individuals, professional resources, organizational supports, or tools that may assist with goal achievement.

Opportunities for Growth:

Identify skills, habits, knowledge, or areas of development you would like to strengthen.

3. Coaching Goals

Goals should be specific, realistic, measurable, and relevant to the your personal or professional priorities.

Goal 1: _____

Desired Outcome: What would successful completion look like?

Action Steps:

1.

2.

3.

Resources or Support Needed:

Target Completion Date: _____

How Will Progress Be Measured?

Goal 2: _____

Desired Outcome:

Action Steps:

1.

2.

3.

Resources or Support Needed:

Target Completion Date: _____

How Will Progress Be Measured?

Goal 3: _____

Desired Outcome:

Action Steps:

1.

2.

3.

Resources or Support Needed:

Target Completion Date: _____

How Will Progress Be Measured?

4. Barriers & Problem-Solving

Potential Barriers or Challenges:

What factors may interfere with progress toward your goals?

Strategies for Addressing Barriers:

What practical steps, resources, or adjustments may help overcome these challenges?

Alternative Approaches:

If the initial plan is not effective, what other strategies could be considered?

5. Action Plan & Accountability

Action Item	Target Date	Progress/Status
-------------	-------------	-----------------

1.		
----	--	--

2.		
----	--	--

3.		
----	--	--

4.		
----	--	--

5.		
----	--	--

Preferred Accountability Strategies (Select All That Apply)

- ☐ Review of goals during coaching sessions
- ☐ Written action plans or checklists
- ☐ Personal reflection or journaling
- ☐ Progress tracking
- ☐ Skills practice between sessions
- ☐ Scheduled goal reviews
- ☐ Other: _____

How will you maintain motivation and accountability between coaching sessions?

6. Coaching Progress Review

Complete periodically throughout the coaching process.

Review Date: _____

Goals Reviewed: _____

Progress Rating:

1 = No Progress | 5 = Goal Achieved

- ☐ 1 — Not Started
- ☐ 2 — Initial Progress
- ☐ 3 — Moderate Progress
- ☐ 4 — Substantial Progress
- ☐ 5 — Goal Achieved

Progress, Accomplishments & Strengths Demonstrated:

Barriers or Challenges Identified:

Adjustments to Goals or Action Steps:

Next Steps / Priorities:

Next Review Date: _____

7. Coaching Outcomes & Completion

Complete when coaching goals have been achieved, revised, or services are concluded.

Date of Completion: _____

Coaching Goals Achieved:

Skills, Knowledge, or Strengths Developed:

Strategies for Maintaining Progress:

Future Personal or Professional Development Goals:

Overall Coaching Experience:

- ☐ Goals Achieved
- ☐ Goals Partially Achieved
- ☐ Goals Revised
- ☐ Coaching Continuing
- ☐ Coaching Concluded

Additional Comments:

8. Collaborative Acknowledgment

This Coaching Goals & Action Plan was developed collaboratively to identify personal or professional objectives, establish practical action steps, and support accountability.

The client understands that coaching is a non-clinical, goal-oriented service and does not constitute psychotherapy, mental health counseling, psychological assessment, diagnosis, or treatment.

The client maintains responsibility for personal decisions, actions, and implementation of identified strategies. Coaching does not guarantee specific outcomes.

Client Signature: _____

Date: _____

Coaching Goals & Action Plan

This document is intended for non-clinical coaching and professional development purposes. It is not a clinical treatment plan or mental health assessment.

Stage	Document	Purpose
Initial inquiry	Coaching Services Application	Identify your interests, goals, and service fit
Before services	Coaching Services Agreement & Informed Consent	You will receive documents that outline expectations, boundaries, and informed consent
Initial coaching session	Coaching Goals & Action Plan	We will work together to identify your priorities and measurable goals. Set timeframe and ongoing sessions estimate (4-8).
Ongoing sessions	Action Plan & Progress Review	Evaluate progress, accountability, and next steps
Final session	Coaching Outcomes & Completion	Review your accomplishments and future development

Cost and Payment

Cost will be determined during the initial coaching session and based on the number of sessions identified by client and coach.

Coaching Plan Session during Plan: \$ _____

Tune Up Sessions Post-Plan: \$ _____