One-on-one Client Tracker Readme

Use the One-on-One Coaching Client Interaction Tracker to journal your interactions with each of your clients. Use the tracker to journal the goals, milestones, session dates and times, notes and resources provided. This standardized way of tracking coaching interaction is necessary to allow Gabe, Steve and the Financial Opportunity Corps Points of Light staff to monitor and guide program implementation.

Please record the client’s name, their goals, milestones they have achieved, resources provided and any additional notes to us on this form. We have included two standardized lists of goals and milestones. We are using a standard set of goals and milestones because this will allow us to easily categorize and understand coaching activity content and assess clients’ progress towards reaching their goals. If your client identifies a goal or milestone that is not on our list, please record it in the area marked “other.” We will add to the lists as the need for additional goals and milestones arise.

The tracker is available in both Word and Excel formats. You may use either one to record your interaction with your client. We prefer you to use the Excel spreadsheet if you are recording the information electronically and the Word document if you use pen and paper. You may scan a handwritten form and e-mail us that form or else just e-mail us the electronic copy.

Please send the interaction tracker to ssimmons@accountingaidsociety.org , and keep a copy for yourself **after every coaching session**.