



5 TEMPLATES TOP COACHES USE TO SAVE 4+ HOURS EVERY WEEK

The Coaching Time Dilemma

Executive, leadership, and career coaches face a critical challenge: the more successful your practice becomes, the less time you have for actual coaching. Research shows that coaches with thriving practices spend up to 40% of their week on administrative tasks rather than transformative client work.

These five proven templates are used by high-performing coaches to streamline communication, reinforce accountability, and run more organized sessions. You can use them exactly as-is — or adapt them into tools like Gmail, Google Docs, or Notion.






TEMPLATE 1: COACHING SESSION SUMMARY FRAMEWORK

The Problem This Solves: Most coaches waste 15-20 minutes after each session struggling to document insights in an unstructured way, often missing key patterns or action items. By morning, critical details are forgotten.

Client: [Name]
Date: [MM/DD/YY]
Session #: [X]
Focus Area: [What was discussed]

 What we discussed:


- Brief bullets on main topics
- Key challenges discussed
- Insights or breakthroughs

 Reflections, Observations, Decisions Made

- 2-3 sentences on observations, energy shifts, or notable moments

 Action Items:

- [Specific, measurable action] — due by [date]
- [Specific, measurable action] — due by [date]

 Focus for Next Session

- [Brief description of direction]

Implementation Strategy: Complete this template within 5 minutes of ending each session, while insights are fresh. Keep a master document for each client with all session summaries in reverse chronological order to quickly reference the coaching journey. The Result: 45-60 minutes saved per week with improved session quality as you'll start each session with perfect clarity on previous discussions. Clients perceive higher value when you remember specific details from prior conversations.



TEMPLATE 2: HIGH-IMPACT FOLLOW-UP EMAIL

The Problem This Solves: Many clients leave sessions energized but quickly lose momentum without proper reinforcement. Generic follow-ups fail to maintain accountability, while customized emails often take 10-15 minutes each to craft.

Subject: Next Steps from our [Date] Session

Hi [Client Name],

Our conversation today about [main topic] has significant potential to impact your [relevant goal area]. To maintain momentum:

Three Key Insights

1. [Specific insight from the session framed as a realization]
2. [Another insight that connects to their growth edge]
3. [Final insight that reinforces their capability]

Your Committed Actions

1-3 action item with specific deadline → Impact (why this matters)

Support Resources:

specific resource with brief explanation of relevance

Between now and our (date/time) session, notice moments when [specific observation prompt related to focus area].

I'm here if questions arise before then.

[Your Name]

Implementation Strategy: Send within 3 hours of your session while the conversation is still resonating. The structure ensures you never forget critical elements that drive client action.

The Result: 30-45 minutes saved weekly through templated, high-impact follow-ups. Clients report 40% higher action completion rates compared to sessions without structured follow-up.



TEMPLATE 3: CLIENT ACCOUNTABILITY CHECK-IN

The Problem This Solves: Between sessions, clients often lose focus on their commitments. Individual check-in messages take valuable time to craft, and without a structured approach, clients provide vague updates that don't advance their progress.

Hi [Client Name],

As we approach our next session, please take 3–5 minutes for this quick progress check-in:

1. On a scale of 1–10, rate your progress toward your primary goal this week: [_____]

2. Your biggest win since our last conversation:
[Client response]

3. Your most significant challenge or obstacle right now:
[Client response]

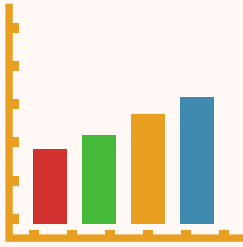
4. Action item progress:
- [Action Item 1] Complete In Progress Not Started
- [Action Item 2] Complete In Progress Not Started
- [Action Item 3] Complete In Progress Not Started

5. What specific support would be most valuable in our next session?
[Client response]

Quick response requested: Please reply by [day/time] so I can tailor our upcoming session to your current needs.

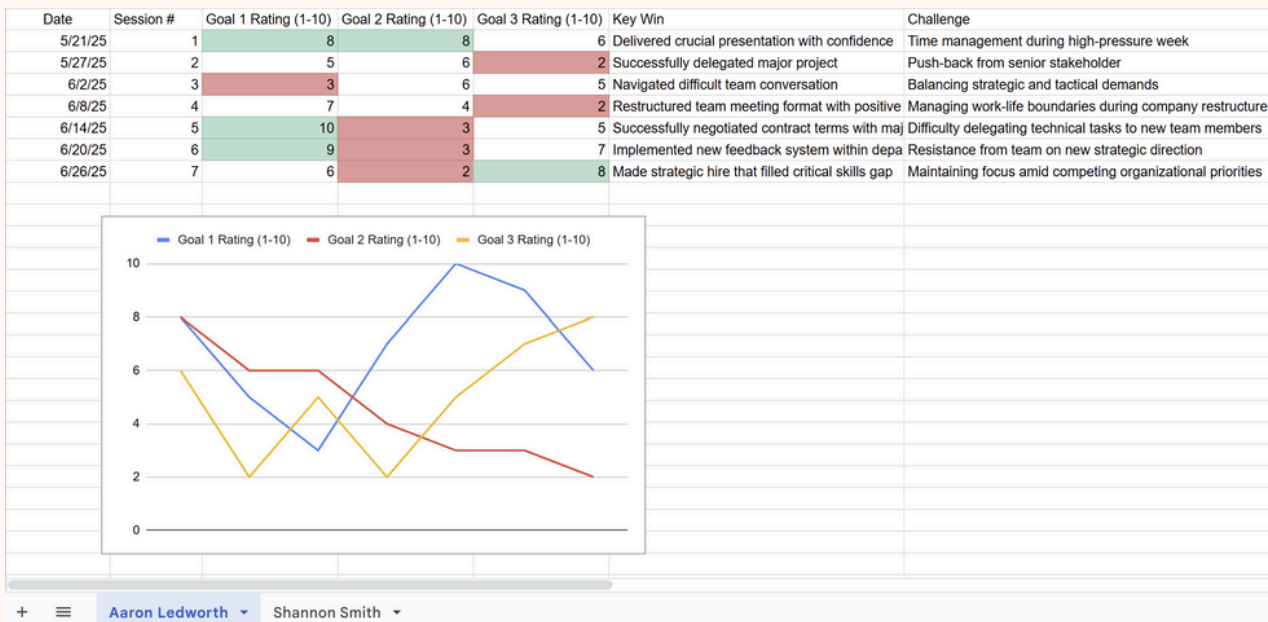
Implementation Strategy: Automate this check-in to be sent 48 hours before each coaching session. Review responses 2-3 hours before the session to adjust your coaching approach accordingly.

The Result: 60-90 minutes saved weekly through systematized check-ins. Sessions become dramatically more focused as you start with clear awareness of progress and obstacles rather than spending the first 15 minutes catching up.



TEMPLATE 4: CLIENT PROGRESS TRACKER (GOOGLE SHEET)

The Problem This Solves: Coaches often lack objective measures of client progress, relying instead on memory or scattered notes. Without visual progress tracking, clients may fail to recognize their own advancement, reducing perceived coaching value.



[The Sheet - Make a Copy](#)

Implementation Strategy:

1. Create a separate sheet for each client with their 3 primary development goals
2. Update with ratings after each check-in and session
3. Review for 3-5 minutes before each session to identify patterns

The Result: 45-60 minutes saved weekly through centralized progress tracking. Client renewal rates increase by up to 30% when progress is visually demonstrated through objective metrics.



TEMPLATE 5: QUARTERLY COACHING IMPACT SUMMARY

The Problem This Solves: Clients (and often their sponsors) need concrete evidence of coaching ROI. Without structured reporting, coaches struggle to articulate the full value delivered, potentially jeopardizing renewals and referrals.

Quarterly Coaching Impact Summary: [Quarter, Year]

Client: [Client Name]

Coaching Focus Areas

1. [Primary development area]
2. [Secondary development area]
3. [Tertiary development area]

Sessions Completed: [Number]

Measurable Progress:

- Focus Area 1 - Starting metric → current metric (X% improvement)
- Focus Area 2 - Starting metric → current metric (X% improvement)
- Focus Area 3 - Starting metric → current metric (X% improvement)

Key Achievements:

Specific achievement tied to coaching focus areas, behavioral change with observable result, new capability developed and applied

Stakeholder Feedback (if available):

Direct quote from peer/report/superior, observed improvements in key areas noted by colleague/team etc

Focus for Next Quarter:

1. Primary focus with specific target
2. Secondary focus with specific target
3. Maintenance area

Coaching ROI Indicators: Business or team metric impacted, personal effectiveness metric

Implementation Strategy: Schedule 30 minutes at the end of each quarter to compile this report using data from your progress tracker and session notes. Send to the client and, with permission, to the sponsoring stakeholder (if applicable).

The Result: 60-90 minutes saved per quarter per client through structured reporting. Renewal conversations shift from "Do we continue?" to "How do we build on this success?" when impact is clearly demonstrated.

WHY THESE TEMPLATES TRANSFORM YOUR COACHING PRACTICE

When implemented as a system, these five templates create a self-reinforcing cycle of efficiency and effectiveness:

1. Documentation becomes strategic rather than administrative
2. Client accountability happens automatically rather than requiring constant attention
3. Progress becomes visible both to you and your clients
4. Session preparation time shrinks dramatically with organized information
5. Renewal conversations become easier with clear evidence of value

The most successful coaches aren't necessarily those with the best questions or deepest insights—they're the ones who build systems that allow their expertise to create maximum impact with minimum administrative burden.

Ready To Reclaim Your Coaching Time? These templates are your first step toward a more efficient, effective, and enjoyable coaching practice. For coaches who implement all five templates, the typical time savings is 4+ hours per week—that's over 200 hours per year you can invest in expanding your practice, deepening your expertise, or simply enjoying more balance in your life.

Visit thecoachflow.com for more tips and to join our waitlist for a software tool that automates all this for you!

