In-home Consultation - Worksheet

# 1. Session Summary

# Objective

This section is designed to be completed after you have conducted an in-home consultation. It is intended to help you capture key points from your sessions, gauge client understanding, and plan actionable next steps. It serves as a foundational self-assessment tool for ensuring clarity, engagement, and continuous progress.

## Key Points Covered

**- Description:** List the main topics, skills, or behaviors that were the focus of the session.



**- Enhancement:** Rate each topic's importance or the client's interest level to prioritize content for future sessions with this client;



## Client Understanding

**- Description:** Document any questions the client had and how they were addressed



**- Enhancement:** Include observations on the client's engagement levels and any areas where misunderstandings were evident to tailor follow-up communications effectively. This should encompass both verbal and non-verbal feedback from the client indicating confusion or interest. Non-verbal feedback could be a confused look, for example, furrowing the brow or scratching the head, or indications of interest such as leaning forward or nodding slowly.



## Next Steps

**- Description:** Outline specific exercises, actions, or goals you gave the client to work on before the next session, aiming to maintain momentum and progress.



**- Enhancement:** Consider what could be added next time to include more reinforcer for the client or to help establish & communicate clear, achievable targets. This approach will help enhance client engagement and offer a clear direction for improvement.



# 2. Time Management

# Objective

To assist you in adhering to the allotted time for sessions, promoting efficiency and respect for both yours and the client's schedule. This section provides a framework for planning the session's structure and pacing.

## Session Breakdown

**- Description:** Plan the session's timeline, including the introduction, information collection, training phases, and conclusion. You can do this before a session, fill it out for a session you've already had, or even better, do it both before and after your session. Detail the expected duration for each segment to ensure a comprehensive yet efficient session.

* How long was/is your session ideally planned for?
* How long did the session go for?
* How long was/is your introduction period?
* How long was/is your information collecting period?
* How long was/it your training period?
* How long was/is your conclusion?

**- Enhancement:** Use this section to review how your session timing went to allow for a smoother transition between activities and ensure that each part of the session receives adequate attention. Brainstorm three ideas for improvement.



## Time Checkpoints

**- Description:** Identify crucial points within the session to assess progress and to help you adjust pacing as needed. Keep an eye on the clock to stay on track.

A crucial point, within the context of a session, is defined as a predetermined moment where you intentionally pause to assess whether you are adhering to the planned timeline. It serves as a checkpoint to evaluate progress and allows for necessary adjustments to the session's pacing to ensure all objectives are met within the allocated time. At each crucial point, you compare the current state of the session against your schedule, considering:

* The overall length of the session **[write how long here] =**
* The ideal time you should reach Crucial point #1, allowing you to gauge early engagement and initial progress.
* Crucial point #1 **[write time here] =**
* The ideal time for Crucial point #2, which helps you assess mid-session achievements and adjust the focus or speed of activities accordingly.
* Crucial point #2 **[write time here] =**
* The ideal time for Crucial point #3, enabling a final pacing adjustment to ensure a strong conclusion, covering all planned content.
* Crucial point #3 **[write time here] =**

Identifying and adhering to these crucial points helps in maintaining a structured and effective session, ensuring comprehensive coverage of material within the available time.

**- Enhancement:** Consider setting alarms or notifications as reminders to check in on your progress. These checkpoints are vital for maintaining control over the session's flow and making real-time adjustments.

## Adjustments

**- Description:** Note strategies for adapting if the session is running long or short to ensure coverage of essential content. Plan for flexibility in your session structure to accommodate these adjustments without sacrificing the session's objectives.



**- Enhancement:** Develop contingency plans for activities that can be shortened or extended based on the session's progress. Having these strategies in place will help you adapt dynamically and keep the session engaging and productive.



# Time Management Checklist

* Check time regularly to stay on track.
* Begin session conclusion at the predetermined time.
* Use visual cues for transitioning to session wrap-up [for example notifications].

# Session Conclusion Checklist

* Start summarizing 10-15 minutes before the end.
* Pick up training kit and other visual cues to signal wrapping up.
* Avoid introducing new information in the last 10-15 minutes.
* Confirm understanding of the session's content with the client.

# 3. Next Session Scheduling

# Objective

To facilitate the efficient scheduling of follow-up sessions, ensuring continuity in the training process. This section aids in proposing and confirming future appointments with ease.

Ideally this is done before leaving the clients home.

## Proposed Dates/Times

**- Description:** At the end of your session, offer a selection of options for the next session, taking into account both the trainer's and client's availability. This proactive approach assists in quickly identifying mutually convenient times, thereby reducing the need for extensive back-and-forth communication later.

**- Enhancement:** Utilize scheduling tools or software to display your availability in real-time, allowing clients to choose a slot that works best for them, streamlining the scheduling process.

## Confirmation Details

**- Description:** Ensure all session details are confirmed and communicated, including date, time, location (for in-person sessions), and any preparatory requirements. Clear and timely communication of these details is crucial for a smooth and effective session.

**- Enhancement:** Implement a confirmation system that sends automated reminders to both trainer and client via email or SMS, reducing the chance of missed sessions and ensuring both parties are adequately prepared.

# Next Session Scheduling Checklist

* Practice the booking conversation script [see example below].
* Present the client with 2-3 scheduling options.
* Confirm the next session date and time before leaving.

Here is an example of a booking conversation script that you can use to schedule a next session with a client at the end of a current session:

**Trainer:** "We've made some excellent progress today, and I'm excited to see how [Pet's Name] continues to improve. To keep the momentum going, let's schedule our next session. I've looked at my calendar, and I have a few options available. Would you prefer a morning or an afternoon slot?"

**Client:** "I think mornings work better for us."

**Trainer:** "Great, I have availability next Tuesday and Thursday morning at 9:30 AM. Do either of those days work for you?"

**Client:** "Tuesday works for us."

**Trainer:** "Perfect! I've got us down for Tuesday at 9:30 AM for our next session. I'll send a confirmation email with all the details and some tips on what to work on in the meantime. Is there any particular area you'd like us to focus on next time, based on what we've observed today?"

**Client:** "I think we should continue working on [Specific Area/Issue]."

**Trainer:** "Understood, we'll focus on [Specific Area/Issue] in our next session. I'll also include some exercises in the email that you can practice until then. If you have any questions or need to adjust the schedule, please don't hesitate to contact me. Looking forward to our next session, and thank you for your commitment to [Pet's Name]'s training!"

**Client:** "Thank you, we're looking forward to it!"

**Trainer:** "You're welcome! Have a great day, and give [Pet's Name] some extra praise from me for today's hard work."

This script includes practicing the booking conversation, presenting the client with 2-3 scheduling options, and confirming the next session date and time before leaving, aligning with the Next Session Scheduling Checklist.

# 4. Trainer Reflection

# Objective

To encourage trainers to engage in self-reflection, recognizing successes and identifying opportunities for growth. This section supports a structured approach to evaluating one’s training approach and client interactions.

## What Went Well

**- Description:** Reflect on the aspects of the session that were successful, including effective strategies or positive client feedback. Identify specific instances where your training approach had a clear, positive impact on the client's learning and behavior.



**- Enhancement:** Write a detailed example of a success you had or breakthrough moment during the session to serve as further motivation and to help you refine your consulting skills.



## Areas for growth

**- Description:** Consider areas where the session could have been more effective or any difficulties were encountered. This reflection should not only focus on challenges but also on potential reasons behind these issues, providing a basis for targeted improvement.



**- Enhancement:** Include a section for feedback received from clients, peers, or self-observations, to identify patterns or recurring challenges that need evaluation.



## Action Plan

**- Description:** Develop a strategy for incorporating insights gained into future training sessions, aiming for continuous improvement. Outline specific steps to address identified areas for improvement. This may include seeking additional training, revising session plans, or incorporating new strategies.



**- Enhancement:** Create a timeline for implementing these changes, with measurable milestones to track progress and effectiveness over time. Consider setting up a mentoring or peer review session to get external input on your action plan.