

First-Session Intake — Facilitator Run Sheet

Folder: first-session-intake · Category: scenario kits · solo or 1–2 per session · 20 min · offline + online · print props · scenario kit

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20

MINUTES

In person + online

SETTING

First-Session Intake — Practitioner Guide

The first session is won or lost before the client arrives: what you asked beforehand, what you are allowed to ask, what you promised, and what the client understood when they signed. This kit runs the whole intake-to-first-session loop — a pre-session intake form, a consent and boundaries card, a session agenda that fits on one page, and a follow-up cadence that does not die in your inbox. Written for private practitioners: therapists, coaches, consultants — whoever takes clients one at a time and lives on the referral chain.

Objectives

By the end of the loop, the practitioner will have:

1. A completed intake in hand before the first session — history, goal, constraints — so session one starts at the problem, not at the paperwork.
2. A consent conversation that is done, understood and recorded: scope, fees, confidentiality limits, cancellation — on one card the client can actually read.
3. A one-page session agenda and a written follow-up cadence (what happens in the 48 hours after, and what re-opens the case).

When to use this kit

- You are opening or formalizing a private practice and your intake is currently “whatever comes to mind on the call”.
- Your first sessions keep running over because the goal got defined in session one instead of before it.
- You lose clients after session one — not to a better practitioner, but to silence between sessions.

What this is not

- Not clinical guidance. What to ask, what to document and what consent must cover varies by discipline, license and jurisdiction — those calls belong to your professional board and your own judgment, not to a printable card.
- Not a diagnosis engine. The intake collects what the client reports; it sorts nothing on its own.
- Not a CRM. It standardizes the paper around the first session; the records system is yours.

Setup

Space: works unchanged for in-person, video and phone. Online: the intake form goes out as a link; the consent card goes out as its own document, never folded into the form.

Materials per client: one intake sheet (print the blanks or lift the items into an online form — see the folder’s FormLM block), one consent & boundaries card, one session agenda sheet for your desk.

Materials for your desk: one card deck within reach during the intake call (you read from it; the client never fills cards), a folder per open case.

Grouping: solo practitioner workflow; the only “group” is you plus the client. Agencies can run it as an onboarding standard across practitioners.

Roles: you own the loop. The client owns the intake sheet. If an assistant handles booking, the consent card still goes out from you, before the session, with a named human to ask.

How to run it

Time	Phase	What you do	The client does
Before booking	Send the loop	Send intake form + consent card together, with one line: “read it, bring questions”.	Fills the intake; reads the consent card; knows what the first session is for.
0–5	Open	Name the agenda from your sheet: goal today, what you will not do today. Confirm the consent conversation happened — ask what they disagreed with.	Hears the frame; asks the question they were unsure about.
5–15	The one thing	Work the intake answers, not a fresh interview. Ask: “if we only fix one thing by session three, what is it?” Write the answer down, in their words.	Gives the goal in one sentence; sees it written where both can read it.
15–20	Close the loop	State next session, the 48-hour follow-up, and the between-sessions task in one breath. Book before they leave.	Walks out with a date, a task, and no ambiguity about the bill.

The card deck

Use the faces from [first-session-intake-prop-cards.pdf](#) : a master card (the loop in one view), the intake prompts card, the consent & boundaries card, the session agenda card, the 48-hour follow-up card, and a watch-out card — plus branded backs and blanks for your own discipline-specific prompts.

Failure modes

1. **Intake as interrogation.** Reading the form aloud line by line kills the session’s trust in minute two. Rescue: you read the intake before the session; the session opens on its answers, never on its blanks.
2. **Consent folded into paperwork.** A consent nobody read is a boundary nobody respects — yours and theirs. Rescue: consent goes out as its own card, and the session opens by asking what they disagreed with.
3. **The goal never lands in one sentence.** Five problems listed, none owned; session three has no finish line. Rescue: the “one thing” question is mandatory; it is written in the client’s words, on paper, visible.
4. **The silence after session one.** No follow-up, no task, no date — the case quietly closes itself. Rescue: the 48-hour card is not optional; the follow-up line and the between-sessions task go out within two days, every client, no exceptions.

Variations

- **Coaching version:** swap the history prompts for current-state / desired-state; keep the consent card (frame, fees, cancellation) — it is where coaching relationships break.

- **Consulting version:** the intake becomes a discovery brief; the “one thing” becomes the engagement’s single success metric.
 - **Group or workshop host:** run the intake as a pre-registration form; the consent card becomes the participation agreement.
 - **Online:** the intake items lift straight into a form (the folder’s FormLM block); responses land before you book — the loop does not need paper to work, paper just makes it cheap.
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Facilitation notes

- The intake belongs to the client’s words. Do not rewrite their goal into your jargon — you will lose the one sentence that sells session two.
 - Say the fee structure out loud at close, every time. Money ambiguity is the quietest reason cases end.
 - If the intake reveals you are the wrong practitioner, say so in session one and hand them a name. Referral generosity is how private practices grow.
 - Keep the blank faces for your discipline: the deck is a frame, not a script — your questions are the content.
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Put it on the wall

Print `first-session-intake-activity-poster.pdf` (A3): the loop, the four phases, the watch-outs — one sheet by your desk. It is also the honest version of what you promise; clients notice.

Props in this folder

- `first-session-intake-prop-cards.pdf` — poker-spec print sheet (63.5 × 88.9 mm, bleed and cut guides): master card, intake prompts, consent & boundaries, session agenda, 48-hour follow-up, watch-out, branded backs and blanks
 - `first-session-intake-run-sheet.pdf` — the print edition: this guide + the debrief, bound as one A4 document with bookmarks (`-Letter.pdf` is US Letter)
 - `first-session-intake-activity-poster.pdf` — the whole loop on one A3 desk sheet
 - `first-session-intake-guide.md` · `-debrief.md` · `-start-here.md` — the practitioner guide, the case-review sheet, the one-page start here
 - `first-session-intake-license.md` — what you may do
 - `SKILL.md` · `first-session-intake.zip` — the machine-readable manifest, and the whole folder in one download
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Agent version

Every file in this folder has a stable public URL — an AI agent can fetch the card deck, the case-review sheet and this guide with three curl commands (see `SKILL.md`), or lift the intake prompts into a real form. The paper version needs a desk, a printer and a client. Keep the consent conversation human; the card carries it, you have it.

First-Session Intake — Case Review Sheet

The intake is the client's words; the review is yours. Use with `first-session-intake-guide.md`. The 48-hour follow-up is the compressed version; this sheet is the full one.

How to run this review

- Do it within 48 hours of session one, before session two's slot gets booked over the case.
- Review against the loop, not against your impressions: did the intake arrive, was consent understood, did the goal land in one sentence, did the follow-up go out?
- Keep the sheet per case. In a young practice it becomes the best evidence you have of what actually closes cases.

Read the four checkpoints

1. **The intake that came back thin** — either the questions are wrong for this client, or the goal is not yet worth twenty minutes of their honesty. Both are fixable; silence is not.
2. **The consent they “just signed”** — nobody reads a document they are not allowed to question. If they could not name one thing they disagreed with, the conversation did not happen.
3. **The goal in your words** — if you cannot find the client's own sentence on your notes, session two is being sold on your goal, and you will be the one defending it.
4. **The follow-up that did not go out** — the case is not lost in session one; it is lost in the week after it.

The six review questions

1. **The one sentence.** Is the client's goal written down in their words, and can you read it out loud without editing? → Targets: goal ownership; a paraphrase is a plan nobody believes in.
2. **The consent test.** What did they push back on or ask twice? If nothing — what would you change about how the card goes out? → Targets: boundary hygiene; unchallenged consent is unread consent.
3. **The intake gap.** Which answer do you wish existed on the sheet — and is that a question you forgot to ask, or a client who is not ready? → Targets: question design; the sheet improves one prompt at a time.
4. **The 48-hour line.** Did the follow-up go out, and did it name a task and a date? → Targets: cadence; a follow-up without a task is a greeting.
5. **The fit call.** Reading the intake now: are you the right practitioner for this case, and would you refer differently knowing what you know? → Targets: honest routing; referral generosity is growth, not leakage.
6. **The pattern check.** Across your last five reviews, which checkpoint fails most — and what single change to the loop fixes it? → Targets: system repair; the fifth client teaches what the first could not see.

Failure modes of the review

Failure mode	Why it happens	The rescue
Review as self-therapy	The sheet becomes a diary of how the session felt	Every line answers against the four checkpoints, nothing else
The skipped week	Caseload pressure, review is “for quiet times”	The review is part of the 48-hour card — it rides with the follow-up
Editing the client’s goal	Your jargon sounds more professional	Quote or nothing; quotation marks are the discipline
One-case thinking	Each case reviewed, nothing learned	The sixth question is mandatory from case five onward

What this is not

This is not supervision, not a compliance audit and not a substitute for your board’s documentation rules. It is a two-page habit that keeps the intake-to-first-session loop honest — the client’s words in front, your blind spots on the sheet, and no case lost to the silence after session one.