



Basic Intake Skills for Any Client

MODULE 3

1. SOME USEFUL GUIDELINES

1. Relax and trust
2. Enjoy the process
3. Listen
4. Get their story
5. Love the details
6. Communicate your interest
7. Connect
8. Don't try too hard

2. MORE USEFUL GUIDELINES

1. Get comfortable with uncertainty
2. Don't fix - no one is broken
3. Learn on the job
4. Always be a beginner
5. Don't be so serious
6. Make sure your client smiles or laughs
7. Drop into spaciousness and timelessness
8. The intake process is as much about teaching your client as it is about asking them questions
9. Some of the best questions for your clients are those that help them understand themselves better
10. What will it take for you to become fascinated with your client?

3. NOTE-TAKING GUIDELINES

1. Spend the first 10 minutes connecting - no notes
2. Try to keep notes to a minimum – in general
3. Take lots of notes after the session
4. The point - focus on your client
5. Stay away from exclusively using printed forms only
6. Ask as much as you can in the live session

4. THE DIETARY INTAKE

- Save the dietary intake for last
- In other words, find out everything else first
- You are helping your client de-emphasize food
- This is almost always a great and welcome surprise for clients





5. SOME USEFUL GUIDELINES

1. If you could wave your magic wand and get whatever you want from our work together, what would that be?
2. Great - I'd love to help you get where you want to go!
3. What's the biggest challenge for you around having this concern?
4. How long have you had this issue?
5. What was happening in your life around the time that this started?
6. What do you think has caused or contributes to this problem?
7. Have you seen any other professionals for help?
8. What was their diagnosis?
9. What strategies have you tried so far to help yourself?
10. What happened?
11. Any other symptoms or health challenges that I should know about?
12. Medications?
13. Supplements?
14. When do you tend to feel best?
15. When do you tend to feel worst?
16. How would life be different for you if you didn't have this challenge? What would your life look like?
17. If this challenge was here to teach you a higher lesson, something deeper, what do you think that would be?
18. Ask questions about work
19. Ask questions about family of origin
20. Ask questions about significant others or partners
21. Ask questions about relationship, dating, dreams, desires
22. Ask questions about kids
23. Ask questions about purpose
24. Ask questions about money
25. Ask questions about where client lives
26. What do you want most in life?

27. Ask questions about sexuality

6. DIETARY INTAKE

1. Let's talk about food.
2. Do you like eating?
3. Are you a fast eater, moderate eater, or slow eater?
4. What are your favorite foods?
5. Dietary intake
 - Feel free to take notes here
 - Be specific and exact
 - Let go of reaction or judgment
 - Assure your client that they can tell you everything – it's ok
 - Watch your client – notice their emotional responses
6. What's the first thing you eat in the morning?
7. What time?
8. Anything to drink?
9. When's the next time you eat?
10. Is this what you have every day for breakfast?
11. How about the weekends?
12. How about when you travel?
13. How often do you travel?
14. What do you mean by a cup of coffee - how big is the cup?
15. Anything else we missed?
 - Repeat this sequence for each meal
 - Keep asking the question – “anything else?”
 - Get approximate portion sizes for things such as fish, meat, cheese, fats, sweets, etc.
 - Find out exact amounts of alcohol and caffeine
 - Don't let your client say something like “I just eat whatever I can find”
 - Find out what they eat after dinner and after dessert
 - Check in with your client – “how is it for you to answer all these questions about what you eat?”



7. DIETARY INTAKE CONTINUED

You're listening for Mind Body Nutrition distinctions:

1. Eating rhythm
2. Macronutrient balance
3. Speed of eating
4. Stressed or relaxed eating
5. Pleasure
6. Nourishment
7. Food quality
8. Food allergies
9. Use of powerful substances

You're also listening for:

1. Toxic nutritional beliefs
2. The four questions
3. Where does your client have "energy"
4. What are their key life stressors
5. What is your intuition telling you
6. Where can your client "re-story"

Intake Session; In the last 20-30 minutes of the session:

- Tell client what you learned
- Express your confidence
- Tell them you think you can help them
- Let your client know you like them
- Tell them some basic ways you will begin the work together
- Give them a time estimate of how long the work may take
- Say a few words about how you work
- You don't need to sell your client here - you simply need to be honest, caring, and clear about your role
- Ask your client if they're onboard
- If so, set up the next session and give them some homework

8. CONSIDER HAVING EVERY SESSION END WITH HOMEWORK

1. Be inventive
2. Be creative
3. Make the homework relevant
4. Make it compelling
5. See your client's response to your suggested homework
6. Ask them for buy-in
7. Ask if you can see the homework
8. Homework helps set you up for your next session

9. SUBSEQUENT SESSIONS AFTER FIRST SESSION

1. Check in at beginning about homework
2. See how the last few weeks have gone
3. What worked, what didn't
4. Use life unfolding as the teacher
5. Acknowledge every small success
6. Acknowledge every effort
7. Make your client right
8. Always work towards your client's highest goal
9. For women - cultivate the feminine

10. MORE SESSION TIPS:

1. Always remind your client how their challenge is a Divine message and an opportunity for transformation
2. Take great notes after the session
3. Consider emailing your client key highlights from your session together
4. Journal about how your client is teaching you
5. Journal about how your client is a mirror for some part of you



11. SOME COMMON MISTAKES IN A SESSION:

1. Counselor is too serious
2. Counselor too clinical
3. Counselor thinks she is smarter or better than her client
4. Counselor thinks it's his job to fix client
5. Counselor gets "bullied" by client
6. We can take the client's small goal too seriously

12. MOST IMPORTANTLY:

- When in doubt, always focus on your client's largest goal, while continuing to do the little things to support their smaller goals
- Be clear inside yourself about who you are, what your mission is, and what you represent. From here, your well-being and success is assured.

13. NAVIGATING RESISTANCE:

- Welcome it - really!
- See it as potential energy for breakthrough
- Resistance is the survival response in action – it has a good reason
- Acknowledge it verbally
- Make it right
- Give resistance a voice
- Your reactions to a client's resistance tells you about your own resistance
- Specifically – the degree of your reaction to their resistance is the degree of your un-owned resistance

14. LASTLY:

Respect your instincts and intuition!