



THE FREE STARTER KIT / WITH DANIELLE

Sounds like you.

Prepare for a session. Tidy the notes. Draft the follow-up. Keep your voice.



START HERE

- 01** Open the AI tool you already use.
- 02** Start with three short things you have written.
- 03** Build your voice guide on page 2. Try fictional notes first.

You do the coaching. AI helps with the work around it. Nothing is sent without your review.



Show it how you talk.

Three short writing samples are enough to start. They do not need to be perfect.

DO THIS

Use your own public posts or writing with private details removed.

PROMPT 1 / MY VOICE GUIDE

These are 3 examples of my writing: **[PASTE THEM]**

Make a short voice guide from these samples.

Include:

- How I open and close a message.
- Whether my sentences are short, long or mixed.
- Words and phrases I actually use.
- 3 practical rules for writing like me.

Quote a few words from the samples to support your observations. Do not invent my personality or a list of things I hate. Keep the guide under 150 words.

Then ask me what feels wrong or missing.

FICTIONAL EXAMPLE / A USEFUL VOICE RULE

Not: "Be authentic and empowering."

Try: "Use short sentences. Say 'Here is what we agreed.' Avoid a motivational speech at the end."

✓ **Edit anything that feels off. Save the guide and use it with your next prompt.**



No recording needed.

Start with a few notes you wrote yourself. A recording is not a requirement.

DO THIS

Practise with the fictional notes below before using any client material.

FICTIONAL PRACTICE NOTES / USE THESE FIRST

Client wants to stop working late.

They agreed to block 30 minutes on Friday to plan next week.

Next session: ask what got in the way.

- 1 Use an approved setup.**
Check the tool and data use are permitted for your practice. Removing a name alone does not make sensitive notes safe to upload.
- 2 Share only what the task needs.**
Leave out identifying details and anything sensitive or unrelated. Fictional notes work for learning the routine.
- 3 Be clear with the client.**
Before using client material, follow your confidentiality obligations and agreed permissions. Explain your actual process, not a generic promise.

IF YOU DISCUSS AI USE WITH A CLIENT

"I use [TOOL] to help draft [TASK]. It would receive [DATA], handled under [YOUR ACTUAL STORAGE AND RETENTION ARRANGEMENTS]. If you prefer, I can do this without AI."

Only use this wording once the details are confirmed. It is a conversation starter, not a complete consent form.

✓ **For now, copy the fictional notes. You can learn the whole routine with them.**



Pick up where you left off.

A useful prep note reminds you what happened. It does not diagnose your client.

DO THIS

Paste the fictional notes, or notes you are permitted to use.

PROMPT 2 / SESSION PREP

Here are the previous session notes and any updates:

[PASTE NOTES]

Prepare a short briefing for the next session, under 150 words:

1. Where we left off, in 2 sentences.
2. Any action the client explicitly agreed to, with a date only if one was recorded.
3. Two open questions I could ask next.

Use only the notes. Do not infer feelings, diagnoses or progress. Keep suggestions separate from recorded facts. If a detail is missing, say 'not in the notes'.

FICTIONAL EXAMPLE / BASED ON PAGE 3

Agreed action: block 30 minutes on Friday to plan next week.

Possible question: "How did the planning time go?"

Not supported: "You are becoming more confident."

✓ **Check the commitment. Choose the questions you would actually ask.**



Keep what matters.

Rough notes are fine. The important part is not turning a possibility into a promise.

DO THIS

Use the same notes from page 3, or your permitted notes from a session.

PROMPT 3 / CLEAN SESSION NOTES

Tidy these session notes: **[PASTE NOTES]**

Use these headings:

- What the client raised.
- What they explicitly agreed to do.
- Dates or next steps, only if recorded.
- Questions to return to next time.
- **[CHECK]**: anything unclear.

Keep it under 200 words. Preserve the difference between "might", "wants to" and "agreed to".

Use quotation marks only for wording clearly marked as verbatim in my source. Otherwise paraphrase. Do not add advice or interpretations.

FICTIONAL EXAMPLE / ONE WORD CHANGES THE MEANING

Source: "Might try planning on Friday."

Keep: "Considering a Friday planning session."

Do not change it to: "Will plan every Friday."

✓ **Compare the clean notes with the original. Fix any change in meaning.**



Send a note. Not a speech.

One clear next step, written in a way you would actually say it.

DO THIS

Paste your voice guide and the notes you have just checked.

PROMPT 4 / THE FOLLOW-UP

My voice guide: **[PASTE IT]**

My checked session notes: **[PASTE THEM]**

Draft a short follow-up email in my voice, under 120 words.

Include a warm opening, one useful point from the session, and the action the client actually agreed to.

Do not add new advice, deadlines, praise or commitments. Use an exact quote only if it is marked as verbatim in the notes. If no action was agreed, do not invent one.

Mark anything missing **[CHECK]**. This is a draft for me to review.

FICTIONAL EXAMPLE / USING THE NOTES ON PAGE 3

Hi [name],

A quick recap: we talked about finishing work earlier. You agreed to block 30 minutes on Friday to plan next week. We can pick up how that went in our next session.

Speak soon, [your name]

✓ **Before sending: right person, right commitment, nothing private added, sounds like you.**

Make this part of your working week.

Explore the live AI for Coaches workshop with Danielle.

[Get workshop dates >](#)

switchboards.ai/ai-for-coaches.html