

Lesson 13

Resource

Take Standard and Consistent Client Notes

Suggested Format: S.O.A.P. NOTES

Subjective

Objective

Assessment

Plan

It is your responsibility to maintain clear client notes that describe your work with each client in a consistent, reliable format. SOAP notes have been used by medical professionals for years, are a highly recommended format, and are easily adaptable to your work as a hypnotist.

Subjective

This category is used to describe what the client is experiencing and feeling. If it is a new client, this is where you write down the client's presenting concern or goal. It is subjective because it is their opinion. Sometimes it may not accurately reflect where you truly need to go in their sessions and what really needs to be done to help them. As you build rapport, you are easily able to discern underlying needs and come to agreement on a plan which will best serve their needs.

If it is the first session:

Example: *I'm here because I am procrastinating and even though I am fully ready and prepared, I just can't seem to get started.*

This is how the client perceives their problem. As a trained hypnotist, you will recognize that procrastination is merely the symptom of a deeper, underlying problem. Procrastination is quite often fear of failure or being judged/criticized. Often there is a subconscious imprint of being judged or seen to be stupid or a failure.

So, the presenting concern was legitimate, however, it was symptomatic of other work that needed to be done. Thus, subjective.

If it is a subsequent session:

Record the subjective feedback of the client since the prior session. What has the client experienced? felt? noticed? Do they feel they are making progress? In what way?

Objective

If it is the first session: Write down what you objectively understand needs to be done. Discuss this with the client, relative to your conversations and what their intake questionnaire reveals.

If it is a subsequent session: Write down what you observe as they discuss results (whether the results are good, or they are struggling).

Example: *Since the first session, John noticed he feels more grounded and balanced. He is generally calm and more deliberate/purposeful in his actions.*

MILESTONES:

1. He created a whiteboard strategy, noting upcoming deadlines and deliverables. Some deadlines for himself; others for his publisher/agent. In the past, even this simple planning would have been too frightening to do, because he felt if he had a plan, he would only fail.
2. He started and finished the first chapter of his book.
3. Rather than writer's block, John noticed he now enjoys developing his storyline and fleshing out the characters.
4. He now feels in control and proud of himself.

This is *objective*. The account is all about what he really did, his actual results, and how he feels now.

Assessment

Record a brief assessment of the client's progress, good or bad.

If it is the first session: Write notes about the client's receptivity, cooperation, expectations. Assess your relationship and ability to work together.

If it is a subsequent session:

Example: *John has made significant progress since the last session. He broke through writer's block; finished a chapter; created an achievable strategy for success, an aid to measure his progress. He no longer feels stuck or a failure.*

Plan

In Session 1 you created a plan and elicited agreement. The plan must be flexible, changing as necessary to meet the client's needs. You are always assessing and planning.

If it is the first session: *I presented my plan to help John overcome "procrastination." understanding it is a symptom of other needs that must be addressed. Based on our conversations and questionnaire, we agreed upon this initial plan:*

SAMPLE: 6 - SESSION PLAN

Session 1: Establish a "subconscious toolkit" to assure success. Create a new, supportive and encouraging internal dialogue. Address more positive ways to manage high stress levels and release irrational fear. Establish a sense of control and autonomy, no longer easily triggered.

Session 2: Emotional healing and release of subconscious imprints from childhood abuse. Release toxic emotions; reconnect with authentic self; inner child healing.

Session 3: Productivity; finish what you start; no distractions; just do it; seize the day.

Session 4: Self Belief; Anchor to success

Session 5: NLP Hypnosis for validation from within. Develop self-love-appreciation and tame the harsh inner critic to a balanced inner voice, celebrating successes even while leading the client to step up, do better and always improve.

Session 6: Learn to be in flow/in the zone, whenever you like and maintain it as long as you need to.

If it is a subsequent session: We will continue with the plan we have in place. It seems that XXXX would be the most appropriate step to take in the next session.

Or perhaps the client wants to eliminate something in the plan that no longer seems relevant or a concern.

Or perhaps the client wants to add something new to the plan.

You now know how to develop a clear, consistent system of note taking, as well as a guide to developing an action plan for each client, based on their intake and specific needs.