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How to write Consistent, Useful, and Reliable Client Notes

Choosing the Right Questions to elicit Valuable Information

**Each client record should include:**

* Personal data (a sample form is in your training manual)
* Signed documents (e.g., Intake Questionnaire, Disclaimer for Hypnosis, Client Bill of Rights, Permission to Record, and any correspondence with the client, whether email or postal)
* Your case history (see in your handouts: Suggested Format: S.O.A.P. notes)
* Any plan or program agreed upon with the client, followed up with amendments as you go along, according to their present needs.
* Notes when a re-assessment of the plan is required
* Notes for each session (use S.O.A.P format) describing the process you used that day (for example: type of induction, visualizations, metaphors, future pacing/future rehearsal, NLP techniques, Suggestion Management, “homework,” if any)
* Any advice given, verbally or passing on of a info, e.g. business cards, referrals for other care, leaflets, etc.) Carefully note in your records if you suggest a client consult with their primary care physician, or a psychologist or psychiatrist for physical or mental health therapy.

**It is recommended to use S.O.A.P notes to consistently record information as follows:**

**S**ubjective

**O**bjective

**A**ssessment

**P**lan

Refer to your handout regarding S.O.A.P. notes for further for advice on what to report within these categories.

**What questions should I ask on my intake questionnaire and discuss in person with the client?**

I find it curious that few trainers go much further than noting the obvious, which is to include name, contact details, medical history, family and support system, job, interests, religion, etc. The success of your sessions, aside from your own skill level, is reliant on the quality of information you glean about the client.

Most instructors will use the basic intake survey in the training manual. They send it in advance to be filled out and signed, along with other important documents, prior to the first session. Then, face-to-face with they client, they ask other questions they feel relevant to take a deep dive with the client to determine their needs.

**Over years, I found added value by including those open ended/NLP questions within the survey. Why?** Because I receive the same information three times: in the phone consultation – in the written Intake Questionnaire – and then in person, where even more information comes up. Each time more is revealed. At the same time, the new client is processing their own story differently. Some clients find it easy to talk, and others are more reticent, finding it difficult to express how they’re feeling. Within my 3-step process, the client reveals much more without even realizing it.

So, before looking at “what questions should I ask” …

**My Information Gathering Process**

1. **In the initial consultation call, I ask the client “What can I do for you? How can I help?”** They often pour out their hearts in a steady stream of consciousness. I allow them to talk and listen carefully, making sure they feel seen, heard, and understood. As rapport is being established, I am receiving valuable information. After I hear their story, I explain a little about hypnosis and how I can help.
2. **Formal Intake Questionnaire**: Immediately following the consultation and scheduling a session, I send “New Client Documents” (mine are autofill docs) which they fill out, sign and click “submit.” This intake contains all the basic information, but mine also includes NLP questioning which get right to their “pain points.” Even though they already when deep into their “story” on the phone, many are amazed at what these questions reveal, not only to me, but to them. The right questions require they think about their concerns in a new way, in a new context and with more perception. The totality of the questioning often elicits an *aha* moment of clarity, in which they really understand how much they need to work on. By the time they sign the intake they are already committed to whatever it takes to heal or progress.
3. **One more time … Now in Person** – After I analyze their answers, I can discern the types of sessions required to address the many aspects that feed into a problem. When I meet with them in person or on zoom, I discuss with them 1) what I understood from their answers (eliciting more direct information to be sure I haven’t misunderstood them in any way), and 2) now I can present a plan of action based on their unique needs (the beginning of a collaboration to find the exact plan that fits their unique needs).

**Revealing Questions to Include in your Intake Questionnaire**

NOTE: These are only suggestions. This is what I find works well for me. Knowing the answers to these questions prior to the session gives you valuable time to prepare and organize your thoughts to plan a high value first session. Aside from the basic intake form provided in the manual, which is excellent so far as it goes, it’s up to you to discover your own process. These questions may especially help a new hypnotist do a little essential preplanning.

*Have you been hypnotized before? If yes, what was your goal? Did you receive the results you were looking for?*

You may discover up front something that will really work for them, or what doesn’t work and to avoid.

*Have you ever attempted suicide?*

*Are you having suicidal thoughts?*

Don’t be afraid to ask. We address this In your training, which includes essential questions you must ask and how to handle the situation.

*What is your primary goal? You may have many concerns to address over multiple sessions. For now, simply highlight THE ONE THING you most want to achieve with hypnosis.*

*About your present situation … When you find yourself in a state of “worry, doubt or fear,” what are*

*YOUR THOUGHTS: What are you saying to yourself/about yourself throughout the day? (your internal dialogue)*

*YOUR EMOTIONS: While thinking those thoughts, what emotions are you feeling?*

*YOUR PHYSICAL RESPONSE: While thinking those thoughts and feeling those feelings, what do you feel in your body? Where do you feel physical sensations and what does it feel like?*

NOTE: Your training includes many discussions about how your perception of reality is shaped by your thoughts, which immediately connect to emotions, physical sensations, and lead to an outcome or behavior. Questioning in this specific way will inform how you help reframe their self-talk with positive suggestions and what emotions and physical responses to address.

**Open Ended Insightful Questions:**

* *Why is it important you resolve the issue which caused you to seek hypnotherapy?*
* *How might you be different as a person once you have made this change?*
* *What would be the consequences of not resolving this issue?*
* *Were you raised in a nurturing, supportive and loving environment? Or was it dysfunctional?*
* *Have you ever suffered emotional, physical, or sexual abuse?*
* *Have you endured excessive, ongoing periods of harsh criticism or bullying?*
* *Do you enjoy your current job/occupation?*
* *Do you enjoy your current social life?*
* *Do you have difficulty with focus/concentration/memory?*
* *If you could do anything you wanted in life, what would you do?*
* *Do you have irrational fears?*
* *Do you have any compulsive behaviors of which you are aware?*
* *Do you have trouble falling asleep or sleeping through the night? And how many hours do you typically sleep each night?*
* *Do you currently follow any religious or spiritual practices?*

Can you see how these questions will reveal a wealth of information, pointing toward distinct paths to take for their ultimate healing? Many of these questions are interrelated. You can become skilled at noticing the many aspects that lie beneath their primary goal and how their experiences are fueling present life problems. We will discuss in training how to get the most value from the information you receive, like peeling the layers of an onion.

During training we will discuss this type of questioning in depth, to give you clarity about what may be revealed and how to create an effective session plan.