CBT Progress Review Checklist

A collaborative blueprint for reviewing change, learning and next steps in therapy.

01 Why review progress?

Progress reviews bring together the client's lived experience, agreed therapy goals, functioning, measures and between-session learning. Scores are useful indicators, not the whole story.

02 Six-step progress review

STAGE	COLLABORATIVE PROMPT
1. Reconnect with goals	Which difficulties did we agree to work on? Are these goals still meaningful?
2. Ask for the client's view	What feels different? What remains difficult? What matters most now?
3. Compare indicators	Review agreed measures, frequency/intensity of symptoms, functioning and behaviour.
4. Examine learning	Which CBT skills were tried? What was learned, including from incomplete practice?
5. Explore obstacles	Consider context, access needs, alliance, formulation and barriers without blame.
6. Agree the next step	Continue, adapt, refocus, consolidate or consider additional support as appropriate.

03 What counts as progress?

Look beyond symptom reduction: increased valued activity, improved functioning, greater flexibility, reduced avoidance, more effective coping, and willingness to try meaningful steps.

Review the evidence together

04 Progress indicators to check

Use a balanced picture

- Client-rated change and satisfaction with therapy
- Relevant symptom measures (e.g. PHQ-9, GAD-7) interpreted in context
- Goal progress and day-to-day functioning (e.g. WSAS when appropriate)
- Frequency, intensity and impact of target difficulties
- Avoidance, safety behaviours and engagement with meaningful activities
- Learning from experiments and between-session practice
- Current risk, safeguarding concerns and any significant changes in circumstances

05 Questions that support collaboration

AREA	QUESTION TO ASK
What changed?	“What have you noticed that you can do now?”
What helped?	“Which changes or skills seem to have made a difference?”
What is stuck?	“Where do we keep getting caught in the same pattern?”
Client feedback	“Is our way of working helping? What should I do differently?”
Next priorities	“If we could improve one thing next, what would matter most?”

06 Example: social anxiety

Goal: Contribute once in a weekly team meeting. **Baseline:** avoided speaking in all meetings. **Now:** contributed twice in four weeks, with anxiety still high. **Review:** behavioural progress is evident even though anxiety remains. Explore what was learned, whether safety behaviours changed and what step feels feasible next.

Clinical reminder

A worsening score or limited progress warrants curiosity and clinical review, not a conclusion that the client has failed. Respond to risk changes through appropriate clinical procedures.

Plan the next phase

07 Decision guide

IF THE REVIEW SHOWS…	CONSIDER TOGETHER…
Meaningful progress and useful learning	Continue and build on what is working.
Partial progress or a plateau	Revisit the formulation, goals, task difficulty and barriers.
Little progress or deterioration	Check fit, alliance, context, risk and whether a different approach or additional support is needed.
Goals substantially met	Consolidate skills, plan for setbacks and discuss ending or step-down.

08 Reusable review record

REVIEW FIELD	NOTES / AGREED ACTION
Original goal and current relevance	_____
Client's view of change	_____
Measures and functioning	_____
What helped / what was learned	_____
Barriers, concerns or new needs	_____
Agreed next step and review date	_____

09 Therapist final checklist

Before ending the review

- ■ The client's priorities and feedback were heard
- ■ Measures were interpreted alongside the wider clinical picture
- ■ Strengths and difficulties were both acknowledged
- ■ Any risk or safeguarding changes were addressed appropriately
- ■ The next action is specific, achievable and jointly agreed

Key message

Review progress with the client, not just about the client. Useful reviews make change visible, identify what needs adapting and support shared decisions.