**Client Onboarding Questionnaire Coaching Services TruNorthmbc**

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| **CLIENT** |  | | | | |
| **POINT OF CONTACT** |  | ROLE IN THE ORGANIZATION | | Owner President  Executive VP  Director \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(other) | |
| **CONTACT PHONE** |  | | | **CONTACT EMAIL** |  |
| **CLIENT LOCATION** |  | | | **Web Site**  **If applicable** |  |
| **INDUSTRY CLASSIFICATION** | Retail  Food Service  Not for profit  Manufacturer  Marketing  Sales  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **BRIEFLY DESCRIBE YOUR BUSINESS OR ORGANIZATION (2-3 SENTENCES)** | |  | |
| **GOALS AND OBJECTIVES** | How would you describe your personal Goals and Objective?  How would you describe your business Goals and objectives? | | | | |
| **BIGGEST WINS** | What have been some of your biggest wins so far (what are you proud of?) | | | | |
| **CHALLENGES AND BARRIERS**  **“What keeps you up at night?”** | What are some of your current challenges to achieving your goals?   * x | | | | |
| **DESIRED OUTCOME** | What is your envisioned outcome and by when? | | | | |
| **“What else do you think I should know?)** | What kind of assistance do think you need?  Skills Development Helping with Prioritization Helping define goals Identify actions and tactics  Leading Teams Other | | | | |
| Please expand on the above in 2-3 sentences: | | | | |
| **TIMELINE** |  | | **BUDGET** | |  |