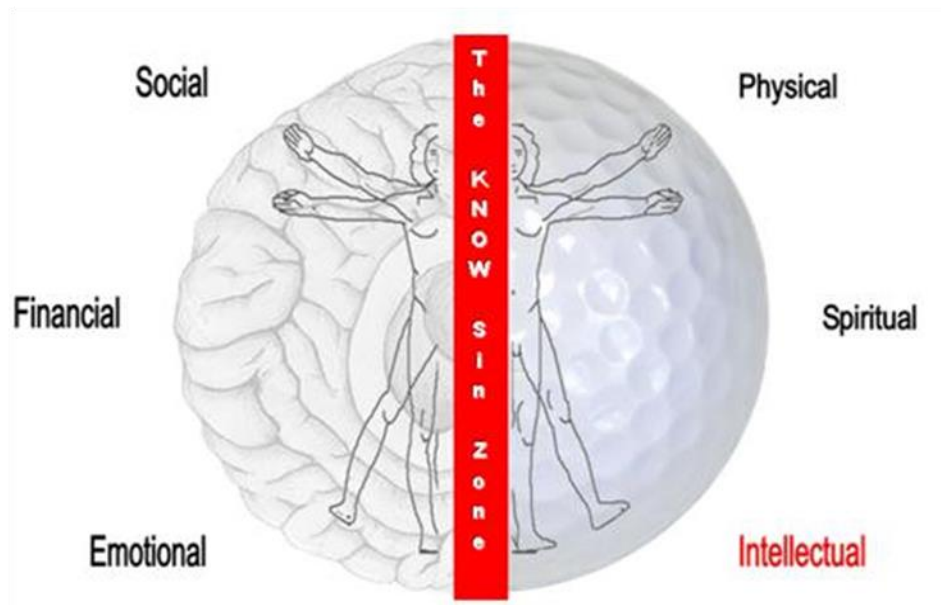




Introduction

We help our clients maximize their personal and professional potential through thoughtful discussions and creative processes. We differ from other methods since before we can help our clients discover "*Who*" they are, we guide them in discovering "*Whose*" they are. Our many years of research and clinical observation have shown the discovery of "*Whose*" our clients will be more valuable than trying to discover "*Who*" they are as other processes do.

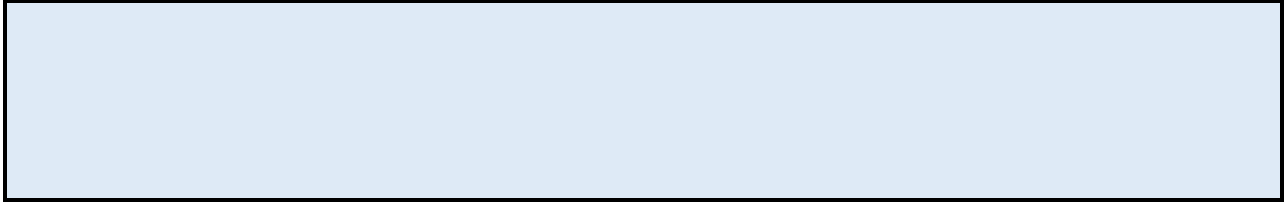
The value of this intake will be determined by the thoroughness used in completing it. That's step one. The work begins in step two when the coach probes the information provided by the client.

As you go through this assessment, DON'T RUSH! Like life, you will reap what you sow. Spend time as you answer the questions, and BE THOROUGH!

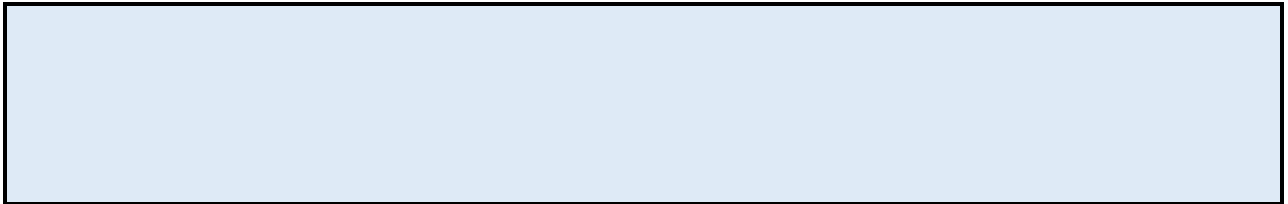
Improvements

Please list any improvements you would like to make in the following areas of your life.

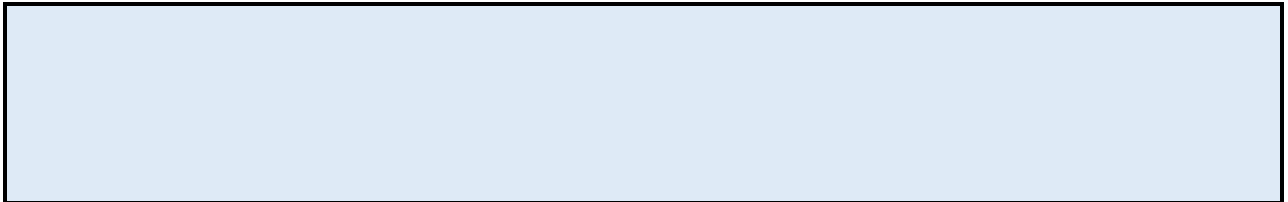
Family/home life –



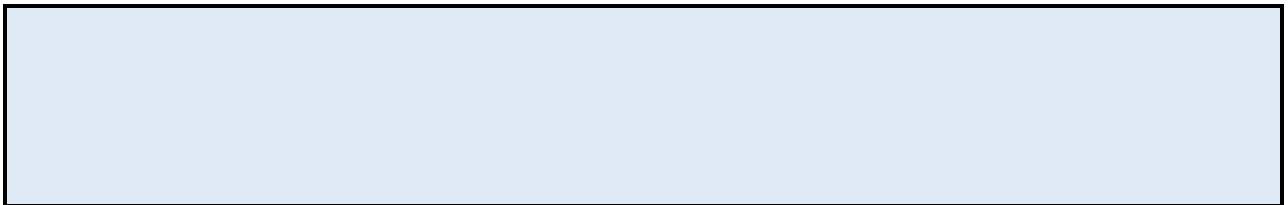
Financial situation –



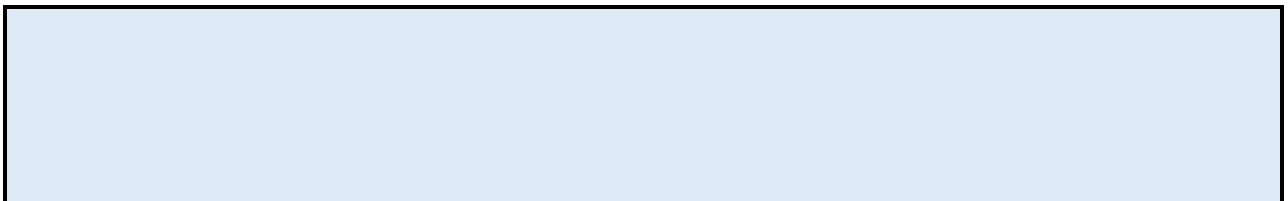
Career or Business life –



Personal Character –



Relationships –



Leisure time –

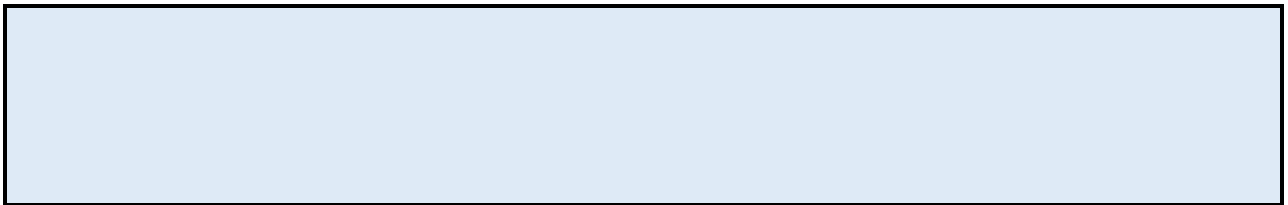


Self-care –

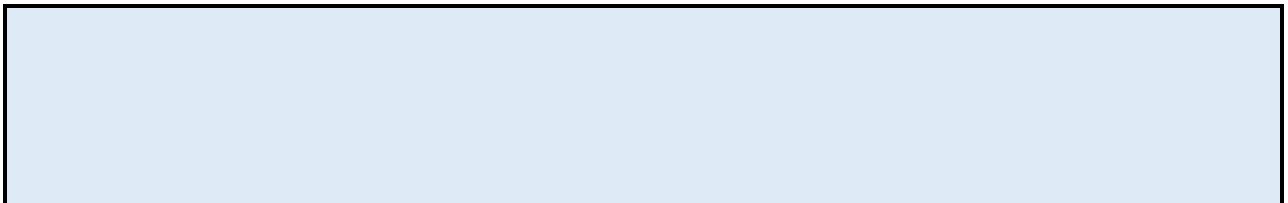


Your Life

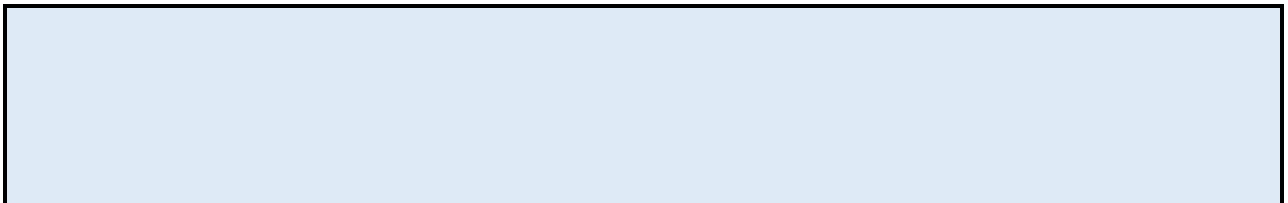
Who are the key people in your life and what do they provide for?



Is your life one of your choosing? If not, which parts are being chosen for you?



What is your favorite part of your typical day?



What is your least favorite part of your typical day?

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Looking at the past six months of your life, do you like the direction your life is moving in?

☐	Yes
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☐	No
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On a scale of 1 to 5, 5 high, rate the amount of stress in your life right now.

☐	1
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☐	2
--------------------------	---

☐	3
--------------------------	---

☐	4
--------------------------	---

☐	5
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What are your primary stressors?

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List five things that you are tolerating or putting up with in your life at present.

Family & job responsibilities, schedules, relationships, neglected health, cluttered life, etc.

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Yourself

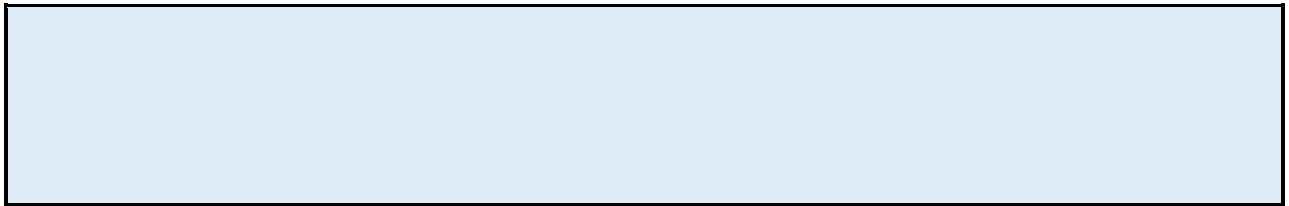
List five adjectives that describe you at your best.

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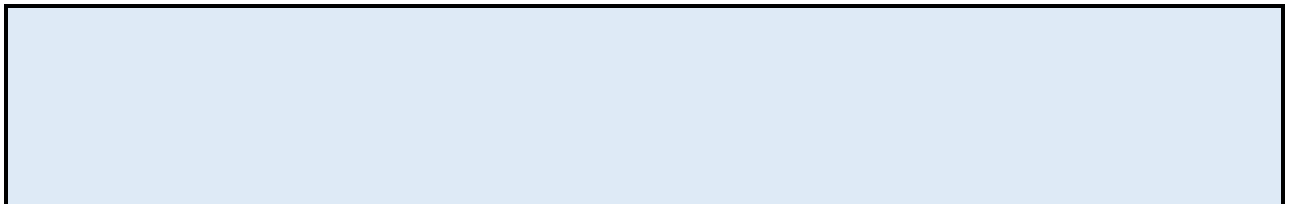
List five adjectives that describe you at your worst.



What are your 3 major concerns/fears about life?



What are your 3 major concerns/fears about yourself?



What motivates you?



What are you learning/accepting about yourself at present?

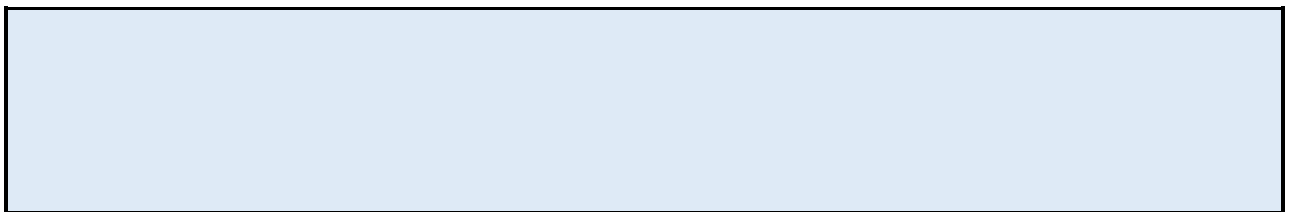


Coaching You

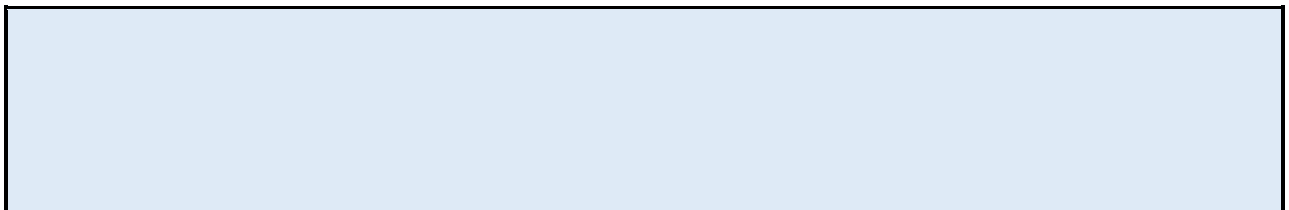
What would you like me to do if you get behind in your goals?



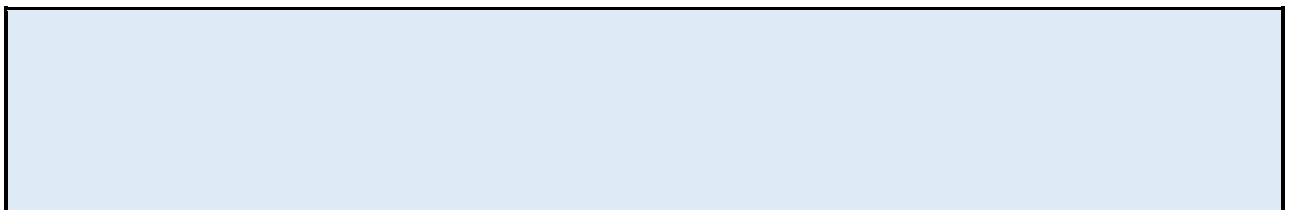
How will you know when you are receiving value from the coaching process?



What types of approaches discourage you or take away motivation?



Do you enjoy self-assessments and improvement programs?



Here are ways coaching clients work with us. Rank order these in terms of what you want most out of our coaching partnership, with 1 being the highest and 10 being the lowest.

☐	Brainstorming strategies together.
☐	Support, encouragement, and validation.
☐	Insight into who you are and your potential.
☐	Painting a vision of what you can become or accomplish exploring and removing blocks and obstacles to your success accountability; checking up on goals.
☐	Work through self-improvement programs together.
☐	Suggesting or designing action steps.
☐	Strategic planning.
☐	Directness; asking hard questions; challenging you to move.

Potential and Possibility

Do you have a personal or professional vision? If so, what is it?

What would you like to contribute to the world?

What do you think is NOT possible to achieve in your lifetime that you wish you could?

What is a dream or goal you have given up on?

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On a scale of 1 to 5, 5 high,, rate the quality of your life today.

☐	1	☐	2	☐	3	☐	4	☐	5
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If you reach the age of 100 and continue to live your life and order your time the way you are right now, what regrets do you think you will have? (tip: complete the statement "I wish I had ..."). Do not include things from the past – only things you will regret if you continue on your exact present path.

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NOTES:

Date	Task	Follow Up

Date	Task	Follow Up