

Coaching Intake Form

The questions on this Intake Form are designed to bring to the surface a description or picture of the current state of your life, your perspective and your vision. This is an opportunity for you to begin framing your future and what you would like to have happen in your life, for yourself. This information will help me understand who you are and how I may best support you and your goals. It is also intended to prompt you to reflect on your dreams and purpose. Take your time and answer the questions with as much candor as possible.

Contact Data & General

Name:

Mailing Address:

Home Phone:

Cell Phone:

Email Address:

Date of Birth:

Age:

Marital Status:

Spouse's Name:

Children's Names and Ages:

Company Name:

Title:

Business Phone:

Occupation:

Your Goals

What are the biggest changes you want to make in your life in the next 3 months?

1.

2.

3.

What are the biggest changes you want to make in your life over the next 3 years?

1.

2.

3.

What do you most want to achieve for yourself in your life/career?

1.

2.

3.

What, if anything, is missing in order to achieve your life/career goals?

1.

2.

3.

What are your 3 greatest accomplishments to date?

1.

2.

3.

Expectations

What do you expect to achieve in life as a result of hiring me as your coach?

Your History

What is the hardest thing in your life that you have had to overcome?

What major transitions have you had in the past two years? (Example: Entering or approaching a different age, a new or different relationship, job role, residence, a change in children's ages/stages, etc.)

Who are or have been your major role models? Why?

Have you worked with a coach before or a similar one-on-one adult relationship (e.g. tennis coach, piano teacher, and therapist)? If so, what worked well for you? What did not work in the relationship(s)?

If so, what worked well for you? What did not work in the relationship(s)?

Your Life Story / History: What would you like to share with me?

Intentional Improvements for the Future

Please list any improvements you would like to make in the following areas:

Family

Money/Financial Situation

Career/Business Life

Service/Personal Character

Relationships

Friends

Living Space/Home

Spirituality/Personal Growth/Learning

Health/Self Care

Creativity

Travel/Play/Leisure time

Other areas

Your Life

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

What is your favorite part of a typical day? Why?

What is your least favorite part of a typical day? Why?

Looking at the past six months of your life, do you like the direction your life is moving in? If yes,/no, explain.

Is your life one of your choosing? If not, please explain?

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

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

What part of yourself, if any, have you given up on?

Tolerations

List five things you are personally tolerating or putting up with in your life at present. (e.g., information you can't find, clutter, rude friends, tight shoes, dented car, job dissatisfaction, dead plants, broken equipment, cranky people in your life etc.)

1.

2.

3.

4.

5.

In a typical week, what do you spend a great amount of time doing?

What are your primary stressors? (What causes you anxiety?)

On a scale of 1 to 10, 10 being high, rate the amount of stress in your life right now.

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 would you like to give to people?

What is your definition of success?

What would be your personal or professional legacy, which you would willingly give to others when it's all been said and done?

Supporting You!

What supports you if you get behind on your goals?

What types of approaches discourage you or take away motivation?

Below are examples of how I might approach coaching clients. Which ones appeal to you?

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

Working through self-improvement programs together

Suggesting or designing action steps

Other Background:

Hobbies:

What do you spend most of your leisure time doing?

Supporting you:

What supports you if you get behind on your goals?

What types of approaches discourage you or take away motivation?

Is there anything else I should know? If so, please include it here: