CLIENT INTAKE

All information is confidential and will be used exclusively by your coach to assist you in creating the results you want.

 Name (Please Print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip code: \_\_\_\_\_\_\_\_\_

Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Preferred Days / Times for Coaching, (I work Mon9-3, Tues 9-3, Thur 9-3, Fri 9-3) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Occupation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Preferred Pronouns: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Highest level of education completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please answer the following questions completely to assist me in providing you with the most comprehensive coaching experience. Write at least three answers to each question. Do not censor or judge any of your answers. Just brainstorm writing down everything that comes to your mind for each question until you run out of ideas. If you have a hard time coming up with seven answers, write something down anyway. If you prefer we can complete this together.

1. What do I love to do?
2. Describe three items you most want to achieve or accomplish as a result of your coaching sessions.
3. What has prevented you from achieving them in the past?
4. How will you know when you have achieved your goals?
5. What would you say have been your 3 greatest accomplishments to date?

6. What major transitions have you had in the past three years? Some examples might be … a change in relationship status, a move, a new job, a new role, entering a new decade, etc.

7. On a scale of one to ten, ten being the highest, list and rate your top 3 stressors in your life right now.

1.

2.

3.

8. What are the top three major fears in your life?

1.

2.

3.

9. What would you like me to do if you get behind on your goals?

10. How will you know when you are receiving value (i.e., your money’s worth) from the coaching process?

CLIENT QUESTIONNAIRE As your coach, it’s exciting for me to get to know who you are, what you value, and how you approach life. I’ve developed this questionnaire with some questions for you and I begin this exploration. Please don’t feel overwhelmed or like there needs to be an exhaustive answer for every question. Just go with your first gut response. That gut response is the best one anyway.

Thanks in advance, Cindy Hess, Life Coach

 Tell me why you’ve hired me.

Do you know what long term or short-term goals that you’d like to focus on for the next 90 days.