



Coaching *for* Change

Client Intake Form

Information: _____ **Date:** _____

Name: _____

Occupation/Title: _____

Business Name: _____

Business Address: _____

Home Address: _____

Business/Day Phone: _____

Home/Evening Phone: _____ Cell Phone: _____

Fax Line: _____

E-Mail address: _____

Web site: _____

Birth date: _____ Age _____

Coaching Day & Time: M T W Th F at _____ for 40 minutes.

1. Key names of people in your business and life that you are likely to talk with me about (list their names in a column):

Referral Source: _____

2. What do you want me to know about you? What are your strengths? What gets you excited? What are you proud of? What is your experience or educational background?

3. What are your reasons for choosing to work with a coach?

4. What is my role as your coach to be?

(Motivation, brainstorming, focus, accountability, support, sounding board, advice? etc.)

5. What are your goals? List 4 or more specific, measurable, realistic goals with dates (within the next 3 to 12 months).

6. What long-term (5 years) business, professional, and personal objectives are important to you?

7. What would your ideal, balanced life look like?

8. What areas of your practice, career and life would you most like to change in the coming year?

9. What part of your practice, career and life are you most satisfied with?

10. What do you enjoy most about your work?

11. What do you like least about your work?

12. If you know, what are your key values?

Standards:

1. You will be completely honest.
2. I will keep your confidences.
3. I have your permission to challenge you to be accountable to your goals and values.
4. You will give me a minimum of 48 hours notice to reschedule a coaching call.
5. Other terms: _____.

Issues to be covered with you at the end of the intake:

- The focus of our work together is clear? _____
- You are willing to take action and make changes to reach your goals? _____
- You are willing to give coaching the time to see the benefits of your actions? _____
- You are willing to consider requests and intruding comments? _____
- You will let me know what you want from the coaching relationship. _____
- Calls/meetings are scheduled? _____
- Letter Agreement signed? _____
- Payment details confirmed _____