



COACHING INTAKE FORM

The purpose of the coaching intake form is to assess your strengths, weaknesses, and coaching goals. Coaching is always tailored around your agenda. So, if your goals change, please let me know so we can revisit these questions.

1. Think about your strengths, what you are naturally good at, what people compliment you on. Then list your TOP 5 here:

1. _____
2. _____
3. _____
4. _____
5. _____

2. Think about your personal weaknesses, areas you want to strengthen, or skills you want to develop. Then, list your TOP 5 here:

1. _____
2. _____
3. _____
4. _____
5. _____

3. Think about your job-related skills or areas of knowledge: List your TOP 5 here:

1. _____
2. _____
3. _____
4. _____
5. _____

4. Think about the personal accomplishments of which you are most proud. List your TOP 5 here:

1. _____
2. _____
3. _____
4. _____
5. _____

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5. Think about things in your life that you are “putting up with,” that drain you, that you don't really want or need in your life. (Small ones might be piles of paper/clutter in your home office that bug you, the suit you've been meaning to take to the tailor. Big ones might be a draining relationship, difficult boss, or feeling stuck about your career.) List your TOP 5 here:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

6. Describe what personal and professional changes you would like to make as a result of our coaching.

7. List 3 Short-Term Goals you'd like to achieve in the next month:

- 1. _____
- 2. _____
- 3. _____

8. List 3 Long-Term Goals you'd like to achieve in the next 3 months:

- 1. _____
- 2. _____
- 3. _____

9. What is one long-term goal you'd like to achieve in the next 6 months?

10. What would you like to be doing and achieving one year from now?

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11. Describe how you will feel when you have accomplished all of these goals.

12. What concerns do you have or potential barriers do you face to achieving these goals? For example, fear of failure, fear of success, time constraints due to a job, skill-deficits. List as many as you can think of:

13. What specific changes would have to occur for you to overcome these obstacles? For example, prioritizing, time management systems, delegating.

14. What is the best way to ensure that you are successful? For example, breaking goals down into more manageable steps, establishing rewards.

15. What coaching style do you think will work best for you? How would you like to handle being held accountable for completing fieldwork assignments and taking the necessary steps to meet your pre-established goals? For example:

- supportive but directive, to the point, and tough on deadlines
- supportive but more nurturing, gentle, just allowing you to move at your own pace

Comments: _____

Client Name _____

16. Is there anything else you want me to know that will help us with our coaching?