

Coaching Intake Form

I am looking forward to our coaching engagement, which will begin on(....) , and end on (....). In advance of our initial 60-minute phone conversation, please complete the form below not later than (.....), which will enable me to learn more about you and your goals. Kindly save the file and then send it to me via email at (.....)

Thank you very much in advance, (.....)

First, Middle & Last Name: Click or tap here to enter text.

Email address: Click or tap here to enter text.

Phone Number(s): Click or tap here to enter text.

Birthdate: Click or tap here to enter text.

I am in the Pacific Time Zone. What is your time zone? Click or tap here to enter text.

What are your expectations from our coaching relationship?

Click or tap here to enter text.

What goals do you wish to achieve over the next six months?

Click or tap here to enter text.

Generally speaking, what principles guide your life, professional choices, and decisions?

Click or tap here to enter text.

How would you describe yourself professionally?

Click or tap here to enter text.

What are your strengths generally?

Click or tap here to enter text.

What are areas of your life for improvement?

Click or tap here to enter text.

In a few sentences, share the story of your life.

Click or tap here to enter text.

What personality or behavioral assessments have you completed? For those completed, please provide a brief summary of the findings. (Please select all that apply below)

Myers-Briggs Type Indicator (MBTI)

This form, which is modified, was adapted from material prepared by Perry Rhue and Associates and Penn State's Leadership Competency Inventory.

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Click or tap here to enter text.

DiSC

Click or tap here to enter text.

StrengthsFinder

Click or tap here to enter text.

Other (please specify)

Click or tap here to enter text.

Do you agree to provide 24 hours' notice of any scheduled coaching cancellation and the opportunity, if my schedule allows, to make up the coaching session? Up to two cancellations are allowed per coaching period, as any more cancellation renders our agreement subject to revocation.

Yes No

Please, select from the statements below, all that you can answer "Yes":

- Are you coachable?
- Committed to your personal and professional development.
- Willing to acknowledge when or where you are stuck in your life,
- Able and willing to receive honest feedback.
- Willing to try new behaviors.
- Willing to reflect on your experience and observe yourself in action.
- Willing to develop areas of your life that may have been neglected.
- Willing to challenge your present beliefs.
- Willing to consider new possibilities for yourself.
- Willing to take risks and to change.
- Open to new ideas other than your own.
- Willing to let go of behaviors or beliefs that no longer serve you.
- Willing to engage in a process of introspection.
- Willing to hear when you have had an unintended impact, negative or positive.
- Willing to do the work required to achieve your coaching goal.