

# Intake Process and Questionnaire

## Client Coaching Questionnaire

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_/V/CODE: \_\_\_\_\_

PHONE: \_\_\_\_\_ MOBILE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

As coach, it's important for me to understand how you view the world in general and yourself in particular. Each person has a unique way of thinking and a unique way of interacting with those around him or her.

Answer each of these questions as clearly and thoughtfully as possible, expressing the best of who you are. These are "pondering" questions designed to stimulate your thinking in a particular way that will make our work together even more productive. I suggest that you take several days to compose your responses to these questions. Thank you.

### **Coaching**

1. What do you want to make sure you get from the coaching relationship? (maybe write down 2 or 3 things that occur to you)
2. How do you want me to be as your coach?
3. What do you want to work on in coaching?
4. What two steps could you take immediately that would make the greatest difference in your current situation(s)?
5. What can I say to you when you are most "stuck" that will return you to action?
6. What changes might you need to make in order to help your coaching be successful?
7. If you trusted your coach enough to tell him or her how to manage you most effectively, what tips would you give?

### **Career (if applicable)**

1. What do you want from your career / job?
2. What are your key career goals?
3. What skills or knowledge are you developing?
4. How do your career goals support your personal goals?
5. What do you want to do to support your career goals?

### **Personal**

1. What accomplishments must, in your opinion, occur during your lifetime so that you will consider your life to have been satisfying and well-lived – a life of few or no regrets?

2. If there were a secret passion in your life, what would it be?
3. What do you consider your role to be in your local community? In your country? In the world?
4. If you could devote your life to serving others – and still have the money and lifestyle you need – would you do it? How would it look?
5. Write down 2-3 things that are really working well for you.
6. What do you do when you're really up against it?
7. If you had a 5-year goal and you had the continuing services of a coach to help you make it happen (and money were not an issue), what would that goal be? What differences would working with a coach make?
8. What's missing in your life? What would make your life more fulfilling?
9. What activities have special meaning for you?
10. Who are the significant people in your life?
11. What have been the significant events in your life?
12. Tell me about a time(s) when you were operating at "peak performance", when things were going well for you, you were "on top of your game", you were pleased with what you were doing or accomplishing. What was going on? Who else was involved? How did you feel? (This is no time for modesty – tell it like it was.)
13. Do you believe in God or in the concept of a higher power? If so, describe the most useful and empowering aspects of your relationship with God. If not, what reference point do you use?

# Coaching Agreement

This agreement is made between \_\_\_\_\_ (“Coach”) and \_\_\_\_\_ (“Client”) on this \_\_\_\_ day of \_\_\_\_, 20\_\_\_. Both parties agree to the following: Coaching is a collaborative process with an ongoing relationship between the Client and Coach. The coaching experience supports the Client in establishing new behaviors. The coaching relationship is strengths-based, forward-looking, and collaborative. The coaching agenda is developed and implemented in partnership between the Client and Coach. The role of the Coach is to help the Client progress toward achieving a goal.

The Client and Coach agree to engage fully in the coaching experience.

The Client recognizes that coaching is not therapy, counseling, or consulting.

## **As a client, your role is to:**

- Make our coaching sessions a priority. You have chosen to invest in yourself. Please take time before each session to review what we have been working on. Please ensure any action steps or homework you decided on has been accomplished to the best of your ability. The most crucial part is for you to have an idea of what you’d like to take away from the session. Coaching is strongly based on the client’s agenda.
- Please arrive to every session on time.
- Come to your session centered and be open-minded. Be willing to change your beliefs and patterns if they do not serve you anymore.
- Give me feedback in the moment about your coaching experience –what works as well as what doesn’t. Do not ever worry about hurting my feelings or fear what I might think. I am here to support you not judge you or make decisions for you. If something I say does not resonate with you, I want to know about it.

## **My Role**

- I will listen closely to you, respond to what I hear and ask questions. If I hear something in your voice or body language that sparks an intuitive idea, thought or image, I’m likely to share it and ask you questions about it. Often it is these small nuances that create the bigger shifts for clients. Remember, if it doesn’t resonate, tell me. I’m not attached to being right.
- At the end of the session, if you do not mention what actions you are ready to take, I will make a coach request. I ask clients to stretch themselves, deepen the work done in the sessions by either journaling at home, taking a defined action, resolving relationships or tackling things that feel incomplete. You are free to negotiate, accept or decline. Most of the work will be in regards to self- awareness and powerful choice.

## **Sessions**

Between sessions, if you have questions, a brief update, or want to bounce some ideas around, please contact me by email. Please keep these contacts succinct. If it seems like it will be better served as session material, I'll suggest that.

## **Schedule Changes**

Please give our session high priority and arrange your schedule to honor our agreed upon time. If you must reschedule, I ask you to give me 24 hours notice or as soon as you are able. I will not reschedule no-shows. Because I am holding an appointment for you and will be unable to fit another client in with less than 24 hours notice, a \$50 session fee will be charged for sessions canceled at the last minute. Emergencies are an exception.

## **Confidentiality**

The Coach agrees to keep all conversations and information with the Client private and confidential, as allowable by law. No personal information will be shared with anyone without the Client's express permission. Exceptions may be made if there is an imminent threat of serious injury to oneself or someone else.

Sign

Date