



Getting started with coaching

Please take the time to complete the following questionnaire, and email it to me by the end of the day prior to our initial session. You'll see questions regarding:

- Personal information
- Coaching intake questions
- Our coaching partnership
- Focus areas

The questions are designed to help me get to know you better. Some of the questions capture information about where you are today. Others will get you thinking about what you want from coaching and how we can best work together. The questions are designed to stimulate your thinking in a way that will make our work together productive and successful.

All questions are optional and completely confidential. Please share what you believe would be helpful for me to understand as your coach..

Answer the questions by typing in the spaces provided. The text boxes will automatically expand, so you can write as much as you like. You might prefer to jot down the first answer that comes to mind, or think about the questions for a day or two before responding. Use whatever process and degree of detail that works best for you.

Please know that there are no right or wrong answers! And that all information you provide – like all information shared during our coaching relationship – is strictly confidential.

If you have any questions, please don't hesitate to email me.
I'm looking forward to working with you.

Personal information:
(all information will be kept completely confidential)

Full name:

Pronouns:

Home mailing address:

Personal email address:

Telephone numbers (work, home, cell) and best number for reaching you:

Emergency contact (name, cell phone, relationship to you):

Date/place of birth:

Name and relationship of key people and/or pets in your life. Please include ages of children if relevant:

Please write or **bullet key events in your life**, past and present, including those that shape who you are today. This may include events from your childhood, adult life, medical training, career trajectory, etc. This is also an opportunity to share past medical or mental health history that you'd like your coach to understand.

I know it can be challenging to summarize your entire life; just do your best. Please keep your response to 2 pages maximum. (The text box will expand as needed.) It can also be much shorter.

Coaching intake questions:

What do you most **appreciate** about yourself and your life right now?

What are you **most proud of** in your work life? In your life as a whole?

What do you feel is **going well** in your work?

What do you feel is **not going well** in your work?

What are the **biggest stressors** in your work or life?

What **personal qualities** do you want to develop and see more of in yourself?

We all have **repetitive self-critical thoughts and beliefs**. I.e. "I'll never be as smart as others" OR "I don't have the confidence that my peers have." Please list at least 3 self-critical/self-defeating thoughts and beliefs that you hold. If you are aware of more than 3, please list as many as you can think of.

What **values** or guiding principles do you hold as important?

What **motivates** you?

Please list any **hobbies**, avocations, or life **passions** (past, present, or desired for the future)

If relevant, please describe **leadership training or development courses/programs** you have taken or are currently involved in.

Do you have any **spiritual or religious beliefs** or **practices** you would like your coach to be aware of? What **reflective** or **self-care** practices, if any, do you currently use? (e.g., meditation, journaling, exercise, prayer, religious community, organizations, mindfulness, etc.) or practices you would like me to be aware of?

If you have ever been or are now in **therapy**, what are important takeaways that you'd like your coach to know?

About our coaching partnership:

What do you want most from working with a coach?

What should I be sure **not to do** as your coach?

When you are "stuck," what can I say that will help you move to action?

How should we address something if the coaching process isn't working or serving you as you would like?

Goals:

Please identify three initial goals that you would like to focus on during our coaching partnership (these may evolve). Please orient around an initial 90-day timeframe. If there are secondary areas, please list them as well.

For each focus area, provide a simple headline and a brief description of a result. In other words, what is your goal, and how will you know that you have achieved it?

If you are unsure, please don't worry as we will discuss your goals further in your intake session. That session will provide an opportunity for us to review and refine your goals.

#1:

#2:

#3:

On A Scale Of 1 – 10, How important to you are the goals you set forth above?