

# Client Intake Assessment - Option 1

# Client Intake Assessment:

The following questions will help me get to know you and give us the ability to jump into our coaching together with greater effectiveness . If you want to email this back to me prior to our first session, I'll read over it ahead of time and if you prefer, we can do it as part of your first session. I'm really excited to know you and understand how I can best come alongside you in your vision and goals. Excited to get started!

1. The 3 things I want most right now are:
2. My personal and professional goals are (list as many as you like):
3. Where I'm stuck:
4. Where I need the greatest support from my coach is:

5. If anything was possible, what I would wish for would be:

6. On a scale of 1-10 how happy are you with your life right now?

- What are the things that make you happy

7. On a scale of 1-10 how stressed are you right now?

- What are your key stressors

8. On a scale of 1-10 how motivated do you feel in your work?

9. On a scale of 1-10 how motivated do you feel in your personal life?

10. What would you like your coach to do if you struggle with your goals?

11. Is there anything you want to share with me that would help me to know and understand you better?

12. How will you know when you're receiving value from the coaching process?

# Client Intake Form - Option 2

# Client Intake Form

Client Name:

Date:

Date of Birth:

Phone Number/ Email:

## Past Coaching

Have you ever had any previous types of support such as coaching, counseling, pastoral counseling, or therapy?

How long and what for?

How did it work for you? Why did you begin, and why did you leave?

On a scale of 1-10 (1 - low, 10 high) rate your experience.

## Goals

What specifically would the perfect outcome look like when our coaching experience is complete?

Why is that important to you?

Why do you believe those goals are right for you?

Have you ever known anyone who has completed these goals?

What might stand in your way?

Who can help you achieve this goal? If anyone...

What have you been doing in a proactive way to achieve your goals?