

Intake Session Form

Name _____

Name you prefer to be called _____

Your Time Zone (or city & state) _____

Landline # _____

Cell # _____

E-mail _____

Job title _____

Description of your responsibilities _____

Description of the type of business where you work _____

Number of years at current place of work _____

The questions below are to help me get to know you better—what works for you, what doesn't, and where you desire change. I suggest that you read them over first, let sit for a day or two, then fill them in.

***Answering as many of these as possible will enhance the process of our Intake Session.
If you'd prefer to answer some of these during session, (or not at all), that's fine.***

1. What are you most proud of?

2. What has been the biggest challenge that you've overcome?

3. How would you describe your satisfaction with your life direction so far?

4. What words describe how you feel about your career?

5. What do you feel is your strongest area professionally?

6. What do you feel is your strongest area personally?

7. What dream of yours is still unfulfilled?

8. What words describe you at your best?

9. What words describe you when you are at less than your best?

10. What energizes you?

11. What de-energizes you?

12. What are your favorite ways to procrastinate or distract yourself?

13. What activities have meaning and heart for you?

14. Do you make time to take care of yourself? (Y or N) Physically_____ Mentally_____ Spiritually_____

15. Imagine you can have one wish fulfilled or one life change. What would that be?

16. What teaching approaches encourage you?

17. What teaching approaches discourage you?

18. What will make this coaching relationship rewarding for you?

19. If there are day(s) of the week and time(s) of the day when you are at your best, please list them:

20. What else would you like me to know about you?

Please list up to 3 areas you'd like to focus on, and indicate its rank in your priorities:

Example: Be More Productive - 1 (The # ranks its priority)

(A)_____

(B)_____

(C)_____