

Office _____
Date of initial Contact _____

Executive Coaching Client Information

Please print clearly!!

Client name _____

Street _____ City _____ State _____ Zip _____

Age _____ DOB _____ Email _____

Phone Day _____ Phone Eve _____ Cell _____

Best Number to call for contact _____

May we leave a general message with individuals who may answer the phone? Ex "call back Dr. Schwarz" or "I need to cancel and re schedule you" or "your appointment is at..."

Yes _____ No _____

Marital Status _____ #of children _____ ages: _____

Highest grade or degree completed _____

Type of employment _____

Company _____

Position: _____

Coaching Questionnaire

Name _____

What are your goals for coaching? Please be as specific and detailed as possible.

What positive steps have you already done to reach your goals?

What positive steps to reach your goals do you realize that you need to do, but somehow can't/don't.

Please describe what seems to get in the way:

What other circumstances / issues are going on in your life that create hurdles to achieving your goals?

Assuming you were to achieve your goals, how would that make a positive difference in your life?

Assuming you were to achieve your goals, how would that create new difficulties or challenges in your life?

How are we going to measure/track success as we move toward achieving your goals?

What resources strengths do you have that we should be applying to achieve your goals?

Who are mentors or role models for you? (This can include people that you have never met such as Einstein, Jack Welch, Madame Curie)

Have you ever had coaching before (including sports) Yes No

What was the experience like? What was most helpful to you? What was least helpful to you?

Physical health/exercise

Play/Fun

Spirituality

Life Dreams or Goals

What things/activities bring you pleasure or joy?

What do you do that connects you with your (best) self?

What characteristics do you consider as your strengths?

Anything else you would like to say: