



Client Information Form

This self-assessment helps me to know more about you as both client and person, and will help you frame the opportunities you want from your coaching experience. These questions will also provide you with some addition insight to the approach I use as coach.

You:

Name
Phone
Email
Company/Title
Education
Marital status/children
Anything else you'd like me to know about?

Your History:

1. Describe your three greatest accomplishments to date.
2. What made these accomplishments stand out for you?
3. How could you use what you've learned from these accomplishments to assist you in making future changes?
4. What major transitions have you had in the past two years?
5. If you worked with coach before, what worked well for you?

Your Self Today:

1. List five adjectives that describe you at your best:
2. What energizes you?
3. Who are or have been your major role models?
4. What are the five most positive things in your life?

5. Who are the key supportive people in your life and what do they provide for you?

6. On a scale of 1 (lowest) to 10 (highest) rate the quality of your life: ____ . By what criteria did you rate yourself?

7. What are you learning and accepting about yourself at present?

8. In what ways do you currently spend time that if you were to spend differently would yield greater happiness and achievement?

Your Potential

9. What is your personal and/or professional vision?

10. What would you like to contribute to the world?

11. What are you most wanting to achieve in the next three years?

12. How ready are you to go for it?

13. Use boxes below as thought starters for the goals above:

Family/Home
Relationships
Financials
Leisure Time
Career/Business
Self-Care
Personal Character
Learning

Making It Happen

14. Why have you hired me?

15. How did you hear about me?

16. What are three immediate changes you can make to get you off to a good start in our coaching?

17. How can I help you to be more effective in working toward your goals?

18. What approaches to change have you found less effective for you?

19. What is your preferred learning style? (visual, auditory, reading/writing, kinesthetic, other)

20. How will you know that your coaching experience has been effective?

***I am excited about making this journey with you.
Thank you for believing in yourself.
Let's run with pace!***