Coaching Intake Form

New client intake for a coaching engagement. Sets the goal, the baseline and the working agreement before session one.

ORGANISATION

DATE

Client details

FULL NAME

PREFERRED NAME

PRONOUNS

MOBILE

EMAIL

TIME ZONE

ROLE AND ORGANISATION

WHO IS PAYING FOR THE COACHING

Where you are now

WHAT PROMPTED YOU TO SEEK COACHING NOW

WHAT IS WORKING WELL ALREADY

WHAT IS GETTING IN THE WAY

FOCUS AREAS (TICK UP TO THREE)

- [ ] Career direction
- [ ] Leadership
- [ ] Confidence
- [ ] Communication
- [ ] Time and priorities
- [ ] Difficult conversations
- [ ] Business growth
- [ ] Work-life balance
- [ ] Decision making
- [ ] Team performance
- [ ] Transition or change
- [ ] Accountability

Where you want to be

PRIMARY GOAL FOR THIS ENGAGEMENT

HOW WILL YOU KNOW YOU GOT THERE

BY WHEN

WHAT HAVE YOU ALREADY TRIED

WHAT STOPPED IT WORKING

How you work best

WHAT HELPS YOU MAKE PROGRESS

- [ ] Direct challenge
- [ ] Space to think
- [ ] Written follow-ups
- [ ] Between-session tasks
- [ ] Regular check-ins
- [ ] Deadlines

WHAT A PREVIOUS COACH, MANAGER OR MENTOR DID THAT WORKED

WHAT YOU WOULD RATHER I DID NOT DO

Logistics

SESSION FREQUENCY

SESSION LENGTH

PREFERRED DAY AND TIME

FORMAT

- [ ] In person
- [ ] Video
- [ ] Telephone

HOW DID YOU HEAR ABOUT THIS PRACTICE

REFERRED BY

Working agreement

- [ ] I understand coaching is not therapy, counselling or clinical treatment
- [ ] I understand what is confidential and what is reported back to a sponsoring organisation, if any
- [ ] I have read the cancellation and rescheduling policy
- [ ] I take responsibility for the actions I choose and the results that follow

CLIENT SIGNATURE

PRINT NAME

DATE

COACH SIGNATURE

PRINT NAME

DATE