



## Basic Personal Information

## Professional Background and Current Situation

What motivated you to seek coaching at this time?

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What aspects of your current role energize you, and which ones drain you?

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How would you describe the gap between where you are now and where you want to be professionally?

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What previous attempts have you made to address your current challenges?

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# Goals and Expectations

What are your top three goals for coaching?

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What have you tried so far to move toward these goals?

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What would success look like for you?

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Are there any skills or habits you want to start, develop, or improve?

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What specific outcomes would make this coaching investment worthwhile for you?

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How will you know you have achieved success in our coaching relationship?

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What is your timeline for achieving these changes, and what contributes to this timeline?

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## Strengths & Challenges

What specific obstacles are you currently facing?

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When facing challenges, what strengths consistently help you overcome them? Please provide a recent example.

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What patterns or behaviors have you identified as your biggest growth opportunities? How do these show up in your daily life?

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In what situations do you feel most confident and capable? What specific elements make these situations different?

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If you resolve one of your challenges through coaching, which would impact your life/career most significantly? Why?

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## Motivation & Readiness

What specific events or realizations have prompted you to seek coaching at this particular time?

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On a scale of 1-10, how ready are you to make meaningful changes in your life/career? Please explain your rating.

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What successes need to happen in our first three months of coaching for you to feel this investment is worthwhile?

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What concerns or reservations do you have about the coaching process? How might these impact your level of commitment?

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**Coaching Preferences & Learning Style**

Describe a time when you learned something new that really 'clicked' for you. What made that experience effective?

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How do you prefer to be challenged or held accountable? Please provide examples of what has worked well in the past.

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What boundaries do you need to communicate upfront to ensure our coaching relationship is effective?

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When I offer feedback, what approach can I take that helps you stay open and curious rather than defensive?

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## Logistics & Practical Considerations

What is your preferred schedule for coaching sessions (time of day, frequency, duration)?  
Please list any standing commitments or constraints.

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How would you prefer to handle between-session communication (email, messaging, phone)?

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What response time expectations do you have?

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What is your preferred communication method for scheduling, rescheduling, or canceling sessions?

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What amount of preparation or pre-work are you willing to commit to between sessions?

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## Additional Comments & Insights

Is there anything else you want to share to help me understand you better as a potential client?

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What questions do you have about the coaching process that this form has not covered?

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Are there any specific topics or areas you prefer not to discuss during our coaching relationship?

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What else would you like me to know about your current situation that might impact our coaching work?

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