

Thank you for investigating the possibility of coaching! Part of this process is filling out a Pre-Coaching Intake Form prior to your complimentary coaching session. This is an opportunity to participate fully in framing your future and to experience how coaching can support you. Your answers will also assist your coach in working with you during your session, to create the maximum value for you. This is not a test. Your information is kept confidential.

Name:	
Address:	
Phone:	Cell Phone:
Age:	E-mail:
Occupation:	Company:
Background information:	

**#1 Change:** What are the biggest changes you want to make in your life in the next 3 months?

1.

2.

3.

What is the biggest change you want to make in your life over the next year?

1.

**#2 Areas of Focus:** Check the three areas that are most important to you:

- |   |   |                                       |   |                                     |
|---|---|---------------------------------------|---|-------------------------------------|
| <input type="checkbox"/> Career         | <input type="checkbox"/> Money            | <input type="checkbox"/> Family       | <input type="checkbox"/> Fun            | <input type="checkbox"/> Creating   |
| <input type="checkbox"/> Health/Fitness | <input type="checkbox"/> Self-Improvement | <input type="checkbox"/> Spirituality | <input type="checkbox"/> Home           | <input type="checkbox"/> Financials |
| <input type="checkbox"/> Relationships  | <input type="checkbox"/> Volunteering     | <input type="checkbox"/> Vision       | <input type="checkbox"/> Accountability | <input type="checkbox"/> Clarity    |
| <input type="checkbox"/> Leadership     | <input type="checkbox"/> Reconciliation   | <input type="checkbox"/> Legacy       | <input type="checkbox"/> Learning       |                                     |
| <input type="checkbox"/> Other:         |   |                                       |   |                                     |

**#3 Unfinished Business:** What are three things that you have not completed, that if you did start working on them today, would immediately move you toward attaining your goals?

- 1.
- 2.
- 3.

**#4 Improvement:** What is the area that, if you made an improvement, would give you and others the greatest return on time, energy and money invested?

**#5 Possibilities:** What is currently impossible to do that, if it were possible, would change everything?

**#6 Choice:** What is the most important decision you're facing? What is keeping you from making it?

**#7 Others' Perspective:** If others were to write a one-sentence story about you, how would they remember and speak about you?

**#8 Expectations:** What are your goals and expectations for coaching? What questions do you have for your coach?

**#9 Moving Forward:** At the end of the coaching session your coach will ask you if you would like to continue the relationship. If you believe that coaching is something that could help you in your particular challenges and achieve your goals better and faster, how committed are you to invest your time, energy and money into starting your coaching?

(low)       1       2       3       4       5      (high)

When completed, please save a copy for yourself and e-mail a copy to [doverjaneperry@aol.com](mailto:doverjaneperry@aol.com). You will be contacted to set up your complimentary coaching session. Thank you for participating in your future and completing this coaching preparation.

For Office Use Only:	
Date Received:	Date Called to Schedule Appt:
Assigned Phone Number:	Coaching Date:
Coaching Time	