



## TRANSITIONAL COACHING INTAKE ASSESSMENT

This questionnaire is designed for me to begin to learn what is important to you and what specific areas of your life you would like to work on, as well as for us to start getting a sense of the bigger vision you have for your life. It is also intended to help me understand how to best coach you. Your answers to this questionnaire are strictly confidential, so please respond openly. The more honest, thoughtful and complete you are with your answers, the better.

### PART I: CONTACT AND BACKGROUND INFORMATION

Current Date: \_\_\_\_\_ Name: \_\_\_\_\_ Age: \_\_\_\_ DOB: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Email Address: \_\_\_\_\_ Home phone: \_\_\_\_\_

Work phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Marital status: \_\_\_\_ Single \_\_\_\_ Single, but in a relationship \_\_\_\_ Married \_\_\_\_ Separated  
\_\_\_\_ Divorced \_\_\_\_ Widowed

Children: \_\_\_\_ Yes \_\_\_\_ No. If yes, names/ages: \_\_\_\_\_

Education (check all applicable): \_\_\_\_ Some Jr. HS. \_\_\_\_ Some H.S. \_\_\_\_ H.S. diploma  
\_\_\_\_ Some college \_\_\_\_ College degree \_\_\_\_ Some graduate school \_\_\_\_ Graduate degree or  
higher \_\_\_\_ Other/Comments: \_\_\_\_\_

If applicable, undergraduate major and minor: \_\_\_\_\_

If applicable, grad./post grad. school concentration: \_\_\_\_\_

Current employment status: \_\_\_\_ Employed \_\_\_\_ Unemployed.

1. If employed, who is your current employer and what do you do?: \_\_\_\_\_

\_\_\_\_\_

2. If unemployed, who was your most recent employer and what did you do?: \_\_\_\_\_

\_\_\_\_\_

3. Are you currently being treated for a mental illness, alcohol or drug abuse?:

\_\_\_\_ Yes \_\_\_\_ No. If yes, for what are you being treated?: \_\_\_\_\_

\_\_\_\_\_









### PART III: PRE AND POST SELF ASSESSMENT

*Directions:* Respond to the following statements by rating your level of satisfaction on a scale of 1 to 10, 1 being the least satisfied and 10 being the most satisfied. "N/A" stands for "Not Applicable."

#### A. DOING

1. I am satisfied with my career or career plans (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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2. My income is/sales are where I want it/them to be:

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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Current Monthly/Average Monthly Gross Income: \_\_\_\_\_

Ideal Month/Average Monthly Gross Income: \_\_\_\_\_

3. I am satisfied with my savings/retirement planning (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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4. I am satisfied with my academic or vocational education (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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5 I am satisfied with my use of free time, in terms of hobbies/activities (circle one):

1 2 3 4 5 6 7 8 9 10

Please explain:

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6. I am satisfied with my physical fitness and health (circle one):

1 2 3 4 5 6 7 8 9 10

Please explain:

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7. I am satisfied with my housing situation (circle one):

1 2 3 4 5 6 7 8 9 10

Please explain:

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**B. Being**

1. I live my **personal** life in a manner that is consistent with what is most important to me (circle one):

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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2. I live my **professional** life in a manner that is consistent with what is most important to me (circle one):

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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3. I am fearful of change in my **personal** life (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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4. I am fearful of change in my **professional** life (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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5. I am motivated in my **personal** life (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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6. I am motivated in my **professional** life (circle one):

1    2    3    4    5    6    7    8    9    10    N/A

Please explain:

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7. I speak negatively about myself (circle one)

1    2    3    4    5    6    7    8    9    10    N/A

Please explain\*

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8. I am able to initiate and accomplish goals without external accountability (circle one):

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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### C. Relationships

1. I am satisfied with my spouse, significant other or dating life (circle one):

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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2. I am satisfied with my relationship with my children (circle one)

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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3. I am satisfied with my relationship with my parents/guardians (circle one)

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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4. I am satisfied with my relationship with my sibling(s) (circle one)

1 2 3 4 5 6 7 8 9 10 N/A

Please explain:

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5. I am satisfied with my circle of platonic friends (circle one):

1    2    3    4    5    6    7    8    9    10

Please explain:

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#### **PART IV: YOUR FUTURE SELF**

##### **A. Dreams and Goals**

1. What are 1 to 3 short term goals you have in your personal life for the next 6 months?

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2. What are 1 to 3 short term goals you have in your career and/or education for the next 6 months?

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3. What are 1 to 3 long term goals you have in your personal life for the next 5 years?

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4. What are 1 to 3 long term goals you have in your career and/or education for the next 5 years?

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5. If you could not fail, what are 1 to 3 things you most want to accomplish in your personal life in this lifetime (e.g. this is your opportunity to dream big)?

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6. If you could not fail, what are 1 to 3 things you most want to accomplish in your career and/or education in this lifetime (e.g. this is your opportunity to dream big)?

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**B. Values Clarification**

1. What makes you uniquely you, in terms of what you value most in your personal and professional life?:

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2. Scan back in your life to a time when you know you were fully alive. You were strong and powerful. Your fingers and toes tingled with it. What were you doing? Who were you with? What was happening around you? What was your role? What was the impact you were having? Why was the event so special? Who were you then?

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2. What moves you in life? What gets you really excited and passionate?

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3. What qualities do you most appreciate in people?

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5. Who do you most admire (you don't have to know him/her personally)? Why?

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**C. Assets and Liabilities**

1. What do you consider to be your biggest assets?

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2. What do you consider to be your biggest liabilities?

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**D. The Coaching Relationship**

1. What do you want from this coaching relationship?

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2. How can I be the best coach for you?

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**PART V: CLIENT ASSIGNMENT**

Please provide the following information by the next scheduled coaching session:

1. What are your top 3 being goals that you most want to work toward with me in the short-term?

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2. What are your top 3 doing goals that you most want to work toward with me in the short-term?

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**PART VI: COACHING INTAKE SUMMARY**

Client: \_\_\_\_\_ Date: \_\_\_\_\_

**Values/Value Clusters:**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_

**Saboteurs:**

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**Special Client Requests/Needs Around Coaching Relationship:**

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**This information will remain strictly confidential**