



Tactical coaching for life, leadership, and legacy

## Client Intake Form

Coaching is more effective and efficient if you can give me some information about yourself at the beginning. This is confidential and you are free to pass on to any of the questions. The more you complete, however, the better I will know you and be able to provide the best coaching experience. Please complete the following as thoroughly as you see fit. All questions are **optional** but the more information you provide the better coaching experience you will have.

### 1. Client Information:

- **Name:** \_\_\_\_\_
- **Email:** \_\_\_\_\_
- **Phone:** \_\_\_\_\_
- **Preferred Contact Method:**  Email  Phone  Text
- **Best Times to Reach You:** \_\_\_\_\_
- **Marital Status:** \_\_\_\_\_
- **Spouse's Name:** \_\_\_\_\_

## 2. Background Summary

- **Current Role/Profession:** \_\_\_\_\_
- **Years of Experience:** \_\_\_\_\_
- **Are you or have you ever been in counseling or therapy? Y or N**
- **If yes, please explain:** \_\_\_\_\_

\_\_\_\_\_

## 3. Coaching Goals

- **What do you hope to achieve through coaching?**
  
- **How will you know coaching has been successful?**
  
- **What are you dealing with right now that needs immediate attention or resolution?**

## 4. Strengths & Challenges

- **What are your key strengths? What do you see as your personal and professional strengths & qualities?**
  
- **What current challenges or growth areas are most important right now?**

## 5. Support System & Resources

- **Who or what supports you in your leadership journey?**
  
- **What resources or habits help you maintain balance and resilience?**

## **6. Expectations for Coaching**

- **What do you expect from your coach?**
  
- **How can your coach best support you?**

## **7. Values & Goals**

- **What are the most important things (good and bad) happening in your life right now?**
  
- **What ways would you like your life to be different one year from now? Be specific.**
  
- **What's getting in the way of those goals?**
  
- **What are your hobbies/areas of interests/passions?**
  
- **What are 3 short-term benefits you intend to receive from our coaching relationship?**
  
- **What are 3 long-term benefits you intend to receive from our coaching relationship?**

- **How can I best coach you?**

## **8. Confidentiality & Consent**

*I understand that coaching is a confidential and voluntary process. My participation is based on mutual trust and respect.*

- **Signature:** \_\_\_\_\_
- **Date:** \_\_\_\_\_

## **8. Coach Notes (Internal Use Only)**

## **9. Final Note:**

### **Looking forward...**

Before you embark on this journey, **consider the following questions:**

1. Do you have places in your life that you would like to work but are not sure where to start?
2. How would life look different if you worked on these things?
3. Would you be willing to change where needed and do things differently?
4. Are you willing to “try on” new behaviors and address obstacles directly?

If these questions resonate with you, maybe coaching is a fit.

When complete, save and email ([sheepdogleadershipinfo@gmail.com](mailto:sheepdogleadershipinfo@gmail.com)) this form to your coach prior to your first session.