Coaching Intake Form

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Name: _____

Date of birth: _____

Phone: _____

Email: _____

Welcome! I'm glad you're here.

Coaching is about looking forward. It's about getting curious about the life you're living, the life you want to live, and the space between the two.

Our work together will focus on discovering what matters most to you, recognizing what's getting in your way, challenging old assumptions, and taking meaningful steps toward the person you want to become.

These questions will help us:

- Discover what brought you here and why now.
- Clarify your hopes, ambitions, and priorities.
- Recognize your strengths, patterns, and possibilities.
- Identify what might be keeping you stuck.
- Create a starting point for meaningful change.

A little warning: This isn't your average intake form because I don't want this to be your average coaching experience.

I hope our time together wakes something up inside of you. Maybe some courage. Maybe clarity. Maybe a little restlessness about a life you're ready to live differently.

Think of these questions as a mini-memoir, with one important distinction: **We're not just looking at the chapters you've already written. We're imagining the ones still waiting to be lived.**

How this works

From each chapter below, choose **3–4 questions** that speak to you. Some might be easy. Others might make you stop and think. That's the point.

Grab a pen and paper, open a notes file, or use voice-to-text. I'm not picky.

Don't worry about writing beautifully. Just write honestly.

Chapter 1: Today (select 3-4 questions to answer)

Where you are and why you're here.

1. If your life right now were a chapter in a book, what would you title it?
2. Give me the two-minute version of what brought you to coaching.
3. Why coaching? And why now?
4. What's working really well in your life right now? What isn't?
5. Where do you feel like you're going through the motions instead of really living?
6. What part of your life is asking for a little more attention, courage, or intention?
7. What would make this season of your life feel especially meaningful?

Chapter 2: What is getting in your way? (select 3-4 questions to answer)

The obstacles, patterns, and stories that keep us from moving forward.

1. What three things are taking up more time, energy, or attention than you'd like?
2. Where in your life do you feel stuck, restless, or ready for something different?
3. What do you keep putting off that you suspect would make your life better?
4. What habits or patterns are no longer serving the person you want to become?
5. What are you tolerating that you might be ready to change?
6. What's something you know intellectually but struggle to put into practice?
7. If fear, expectations, or other people's opinions weren't making decisions for you, what might you do differently?

Chapter 3: The Story of You (select 3-4 questions to answer)

The stories we tell ourselves have a way of becoming the lives we live.

1. Complete this sentence: "I'm the kind of person who..."
2. What are three words you'd use to describe yourself? What three words would you like people to use?
3. Who or what has most influenced the person you've become?
4. What's a story you've told yourself for years that you might be ready to rewrite?
5. What do people consistently come to you for?

6. Tell me about a time you surprised yourself with your courage, creativity, or resilience.
7. What is something about yourself you've outgrown but still carry around?
8. If you were writing the next chapter of your story, what would you want the central theme to be?

Chapter 4: What really matters? (select 3-4 questions to answer)

Because a full calendar doesn't necessarily mean a full life.

1. When do you feel most alive, energized, and unmistakably yourself?
2. What matters enough to you that you're willing to do hard things for it?
3. What are your non-negotiable values?
4. What brings you joy, curiosity, wonder, or a sense of purpose?
5. If someone watched how you spent your time, would they know what matters most to you?
6. What would you love to make more room for in your life?
7. Where are you living in alignment with your values? Where might you be drifting?
8. What do you want your life to stand for?

Chapter 5: Your People & Your World (select 3-4 questions to answer)

We don't become ourselves in isolation.

1. Who are your people? Who brings out the best in you?
2. Which relationships energize you? Which ones leave you depleted?
3. Who challenges you to grow rather than simply stay comfortable?
4. Where in your life do you feel a strong sense of belonging?
5. What kind of friend, partner, parent, colleague, or leader do you want to become?
6. Where might you need stronger boundaries, more honesty, or a little more courage?
7. Who could support you as you begin making meaningful changes?

Chapter 6: The Life You Want to Live (select 3-4 questions to answer)

Imagine it's a year from now, and things are going remarkably well.

1. Where are you? Who is around you? How are you spending an ordinary Tuesday?
2. What feels different about the way you're living?
3. What are you doing more of? What are you doing less of?
4. What have you finally given yourself permission to pursue, change, or let go of?
5. What is something you've always wanted to try, create, learn, or experience?
6. What might life be inviting you to do in this particular season?

7. What would make you proud of how you've spent the next 12 months?
8. If our coaching work is successful, what will be noticeably different in your everyday life?

Chapter 7: A Little Random Goodness (select 3-4 questions to answer)

Because you're more than your goals and your to-do list.

1. What are you ridiculously good at doing?
2. What makes you laugh every single time?
3. What can you get completely lost in for hours?
4. What did you love doing as a kid that you've somehow stopped doing?
5. What's something people might be surprised to learn about you?
6. What's a small adventure you've been meaning to have?
7. What's something you've always been curious about but haven't explored?
8. What's something you already know you need to do but haven't done?
9. What are you secretly hoping I'll ask you about?
10. What should I know about you that no intake form would ever think to ask?

The Practical Stuff - Please answer all questions in this section.

1. What are the top three areas of your life you'd like to focus on through coaching?
2. Have you worked with a coach, therapist, mentor, or similar professional before? What was helpful or unhelpful about that experience?
3. How would you describe your current level of energy, motivation, and overall well-being?
4. Are there any physical, emotional, or mental health circumstances that may affect your ability to participate fully in coaching? You don't need to share diagnoses or medical details unless you choose to.
5. What tends to derail your best intentions?
6. How do you prefer to be challenged or held accountable?
7. Faith or spirituality: Is it important to you, and would you like it incorporated into our coaching conversations?
8. What would make our work together feel like an excellent investment of your time, energy, and resources?

What would you like more of in your life?

Check anything that resonates.

☐ Clarity and direction
☐ Confidence
☐ Courage
☐ Meaning and purpose
☐ Creativity
☐ Adventure
☐ Better relationships
☐ Healthier boundaries
☐ Work-life balance
☐ Career fulfillment
☐ Personal growth
☐ Leadership
☐ Self-discipline
☐ Focus and follow-through
☐ More intentional living
☐ Faith or spiritual growth
☐ Joy and playfulness
☐ Rest and simplicity
☐ Authenticity
☐ Connection and belonging
☐ Something else: _____

What tends to hold you back?

Check anything that sounds familiar.

☐ Overthinking
☐ Procrastination
☐ Perfectionism
☐ Fear of failure
☐ Fear of disappointing others
☐ People-pleasing
☐ Comparing myself to others
☐ Lack of direction
☐ Difficulty making decisions
☐ Taking on too much
☐ Trouble setting boundaries
☐ Lack of confidence
☐ Getting distracted
☐ Starting things but not finishing
☐ Staying too comfortable

☐ Trying to control everything
☐ Putting everyone else first
☐ Waiting for the perfect time
☐ Other: _____

Readiness for change

On a scale of 1–10:

How satisfied are you with the direction of your life right now?

____ / 10

How clear are you about what you want next?

____ / 10

How ready are you to make meaningful changes?

____ / 10

How confident are you that you can follow through?

____ / 10