

Coaching Intake Form

[Stacy Cahalan](#)

Name: _____

Birth date _____

Phone number _____

Email address _____

VISION + GOALS

- Imagine yourself 12 months from now — what's different, better, or more aligned in your life? (Think about work, relationships, mindset, confidence, clarity, creativity — whatever matters to you.)
- What are 2–3 goals you'd love to work on through coaching? (They can be personal, professional, or even spiritual — big or small.)
- What does success look or feel like for you in this season of life?
- What gets in your way? What are some patterns, habits, or inner doubts you've noticed?

STRENGTHS + VALUES

- What do you naturally do well? What do friends or coworkers say you're good at?
- What activities or environments light you up? (Think: times when you lose track of time, feel fully present, or most yourself.)

- What values matter most to you?
☐ Integrity ☐ Creativity ☐ Connection ☐ Adventure ☐ Faith ☐ Freedom
☐ Growth ☐ Stability ☐ Fun ☐ Service ☐ Family ☐ Achievement
☐ Other: _____
- When do you feel most energized or alive?

SELF-REFLECTION

- If your life had a “theme” right now, what would it be? (A title, word, metaphor, or song lyric?)
- What do you want more of in your life? What do you want less of?
- What's one thing you're proud of, and one thing you're still working on?

COACHING RELATIONSHIP

- Have you worked with a coach, mentor, or counselor before? What was helpful (or not)?
- What kind of support helps you grow best?
☐ Encouragement
☐ Accountability
☐ Gentle reflection
☐ Direct feedback
☐ Creative brainstorming
☐ Space to talk it out
☐ Other: _____
- What's something you want me to know about you as we start working together?