



Developing the Next Leaders

TIME TO DO THE THINGS YOU LOVE

SALES EXECUTIVE COACHING

INTAKE FORM

Contact Data & General:

Name:

Mailing Address:

Home Phone:

Business Phone:

Cell Phone:

Fax:

Email Address:

Date of Birth:

Marital Status:

Spouse Name/Anniversary:

Children's names and ages:

Religion (optional):

Occupation:

Length of time at this occupation:

Your Goals:

What are the three biggest changes you are committed to make in your life in the next 3 months?

- 1.**
- 2.**
- 3.**

What are the three biggest changes you are committed to make in your life over the next year?

- 1.**
- 2.**
- 3.**

What do you commit to achieve in life and your career?

What would you say have been your 3 greatest accomplishments to date?

- 1.**
- 2.**
- 3.**

What is the hardest thing in your life that you have had to overcome?

Your Life:

Who are the key people in your life and what do they provide for you?

On a scale of 1 to 10, 10 high, rate the amount of stress in your life right now:

What are your primary stressors?

List five things that you are tolerating or putting up with in your life at present. (Examples: information you can't find, clutter, rude friends, poor lighting, tight shoes, dented car, job dissatisfaction, dead plants, broken equipment, old appliances, etc.)

- 1.
- 2.
- 3.
- 4.
- 5.

Yourself:

List 5 words that describe you at your best.

- 1.
- 2.
- 3.
- 4.
- 5.

What motivates you?

What takes away your motivation?

What are you learning about your life?

On a scale of 1 to 10 with 10 high, rate the quality of your life today.

If known, please list your top 5 strengths from Gallup StrengthsFinder:

- 1.**
- 2.**
- 3.**
- 4.**
- 5.**

What types of *approaches* discourage you or take away motivation?

Here are ways coaching clients use us. Which ones appeal to you?

Brainstorming strategies together

Support, encouragement and validation

Insight into who you are and your potential

Painting a vision of what you can become or accomplish

Exploring and removing blocks and obstacles to your success

Accountability; checking up on goals

Working through self-improvement programs together

Suggesting or designing action steps

Any additional comments: