

executive coaching intake form



Career Background

Define your current role in one sentence

How long have you been in this role?

How effectively do you feel you're fulfilling your role as it's defined, as a percentage?

What are your three biggest challenges to fulfilling your role?

- 1.

- 2.

- 3.

What are your three biggest strengths for fulfilling your role?

- 1.

- 2.

- 3.

What three things would make your role easier to fulfil?

- 1.

- 2.

- 3.

Who do you report to?

Who reports to you?

Any additional information you think may be relevant about your career



your life you choose

YOU Life and Performance Coaching Ltd Level 3, 2-12 Allen Street, Wellington t: 0274 849 706 e: lyncia@you.co.nz www.you.co.nz

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Company information

What business are you in, in one sentence?

What are the 3 main pressures on your industry right now?

- 1.

- 2.

- 3.

How are products or services made, distributed and sold?

What's happening in management?

What's happening in your remuneration?

Anything happening in how your teams are organised?

What's happening in IT and operations?

What have been your company's three biggest challenges right now?

- 1.

- 2.

- 3.

What have been your company's three biggest wins lately?

- 1.

- 2.

- 3.

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Personal information

What are your three top personal values?

- 1. _____
- 2. _____
- 3. _____

How well do these values align with those of your company?
Define each value as a percentage.

- 1. _____
- 2. _____
- 3. _____

Rate the following areas out of 10

Where 10 means you are totally happy with the area, it supports you and your vision for your business, and 5 means the area is half way there.

- Family life /10
- Main relationship /10
- Social Life /10
- Community life /10
- Health /10
- Stress levels /10
- Level of personal satisfaction /10
- Sense of balance /10

Any other comments about you and your business you think I should know as your coach?

List three things you would most like out of coaching:

- 1. _____
- 2. _____
- 3. _____

Any additional information you think may be relevant to the coaching?



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