COACHING INTAKE CHECKLIST

When starting your coaching with a new client, this form will help you remember to set the stage for a productive relationship. Feel free to modify this form to suit your particular coaching needs and philosophy.

Intake Steps:

□ Give client intake form to obtain basic information.

□ Ask client to verbalize goals.

□ Ask client to identify specific results he/she is looking to achieve.

□ Give client a goal sheet with specific objectives, expected results, and timeline.

□ Ask client, "Why are you seeking help now?"

□ Give client a contract with the terms and conditions of your coaching program.

□ Set up coaching schedule.

□ Establish a billing and payment procedure.

□ Explain what coaching is and isn't.

□ Explain your background and philosophy.

□ Explain confidentiality procedures.

□ Explain boundaries, including contact between coaching sessions.

□ Explore possible obstacles to making progress.

□ Explore how client has tackled problems in the past.

□ Explore different solutions and strategies that fit the client's needs.

□ Explore any additional questions about the process.

□ Organize homework activities and assignments that will be assigned to the client.

□ Explore how client will measure growth and progress on a short- and long-term basis.