Before our first session

Answer what you can before our first session. Skip anything that doesn't apply.

Questions marked * are required.

Completed by _____ Date _____

1 About you

Why we ask: So I can reach you and plan sessions in your time zone.

1. **Your name ***

2. **The name you'd like me to use**

3. **Email ***

4. **Phone**

5. **Time zone ***

6. **Best way to reach you between sessions**

   Tick one.

   ◯ Email ◯ Text message ◯ Phone call

2 Where you are now

Why we ask: So I coach the thing that matters most to you.

7. **What would you like coaching on? ***

   Tick one.

   ◯ Career or work
   ◯ Leadership
   ◯ My business
   ◯ Life and relationships
   ◯ Something else

If you chose “Career or work” or “Leadership” in question 7.

8. Your role and where you work

If you chose “My business” in question 7.

9. Tell me about your business

What it does, how long it's been running, who it serves

10. What's happening right now that made you want a coach? *

11. How satisfied are you with this part of your life today?

Circle one.

Not at all 1 2 3 4 5 6 7 8 9 10 Completely

3 Where you want to be

Why we ask: So we both know what success looks like.

12. What would you like to be different in three months? *

13. How will you know it's working?

14. What might get in the way?

15. Put these in order of what matters most to you

Number these from 1 (first choice) to 5.

___ Clarity

___ Confidence

___ Accountability

___ New skills

___ Balance

4 What you've tried

Why we ask: So we skip what didn't work and build on what did.

16. Have you worked with a coach before?

Tick one.

◯ Yes ◯ No

If you chose "Yes" in question 16.

17. What worked well, and what didn't?

18. What have you already tried on your own?

5 How you like to work

Why we ask: So our sessions fit the way you like to work.

19. Which coaching style suits you best?

Tick one.

- ◯ Direct and challenging
- ◯ Calm and supportive
- ◯ A mix of both
- ◯ Not sure yet

20. What helps you between sessions?

Tick all that apply.

- ☐ A short email check-in
- ☐ A task list
- ☐ Something to read or watch
- ☐ Nothing, I'll reach out if I need to

21. When are sessions easiest for you? *

Tick all that apply.

☐ Weekday mornings ☐ Weekday afternoons ☐ Weekday evenings ☐ Weekends

22. Anything you'd like me to read first (optional)

A CV, a business plan or a recent review. A PDF or a photo works.

Attach: Anything you'd like me to read first

23. Anything else I should know before we start?

24. Book your first session

Booking happens online. We will send you a link.

Thanks, that's everything

I'll read your answers before our first session.