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.