

Client Intake

First & Last Name

Spouse First & Last Name

Mailing Address

Preferred Phone Number

Preferred email

Spouse Contact Number

Spouse Email

How do you preferred to be contacted?

Email

Phone call

Text

How does your spouse prefer to be contacted?

Email

Phone call

Text

Birthdate

Spouse Birthdate

Anniversary

How many children do you have

How many are still in the home?

What do you expect to get out of your coaching sessions?

Briefly share your life and businestry goals. Where do you see yourself 1 year from now?

ACCOUNTABILITY

How do you prefer to be held accountable? One of the most challenging aspects of coaching is knowing what to do when the couple we are working with is not completing the work we've agreed upon. Since everyone's motivations are different, I'd like you to tell me how I should respond in the following situations:

If you are not prepared for a scheduled meeting (first time), would you like me to:

End the meeting and request that you reschedule (forfeiting the session)

Spend the meeting discussing why you were unprepared and how to manage your time better

If you are not prepared for a scheduled meeting (repeated offense), would you like me to:

End the meeting and request that you reschedule (forfeiting the session)

Pause our coaching relationship while you prioritize your tasks

Make a referral to a time management coach to help you

If you do not complete the work required to move forward towards your goals (first time), would you like me to:

Help you explore potential roadblocks and solutions

Revise our plan to include smaller sub-goals

Other

If you do not complete the work required to move forward towards your goals (repeated offense), would you like me to:

Revise our plan to include smaller sub-goals

Impose a monetary fine

Pause our coaching relationship while you prioritize your tasks

Other

If after 90 days of coaching, you have not achieved the goals we outlined at the beginning of the relationship, would you like me to:

Suggest a different coach who you might work better with

End our coaching relationship

Revisit our initial agreement and revise accordingly

Other