



Personal Leadership Business Development

Client Intake Information

PERSONAL INFORMATION

Date: _____

Full Name: _____

Name you would like to be called: _____

Mailing Address: _____

Phone: Cell: _____

E-mail: _____

Marital status: _____

Number of Children/Grandchildren: _____

Job Title / Vocation: _____

Company name: Company website: _____

Key interests & hobbies? _____

Have you worked with a coach before? When? _____

GENERAL LIFE QUESTIONS:

What are your top 3 core values?

1. _____

2. _____

3. _____

If you could paint a vision of your ideal life, what would it look like?

What is one thing you want LESS of in your life?

What is one thing you want MORE [~in your life?

What are 3 things you are tolerating in your life right now?

1. _____
2. _____
3. _____

What has been your greatest achievement to date?

What are 3 things you MUST accomplish in the next 3 to 6 months?

1. _____
2. _____
3. _____

What is something you MUST do during your lifetime?

If you knew you could do anything and you could not fail, what would you do?

What do you typically do when you become "stuck"?

GENERAL BUSINESS QUESTIONS:

Are you (and your business) currently operating in your sweet spot or passion zone? _____

Do you have and follow a business plan with a vision, mission and defined goals? _____

What has been your greatest career/business success? _____

What are your top 3 career/business challenges?

1. _____

2. _____

3. _____

What are your key career/business objectives for the next 1-2 years?

What are the key skills and talents that contribute to your career/business success?

What are the key inhibitors to your career/business success?

BEING COACHED:

What do you want to make sure you receive from our coaching relationship?

Please share any other information that may apply to your coaching needs.

NOTE: Please complete the Wheel of Life exercise. We will discuss the results during the intake exercise. A graphic and more instructions are included below.

WHEEL OF LIFE

Assign each of the 8 areas listed below with a score of 1 to 10 to rank your level of satisfaction with that area.

_____ Physical Environment (eg. Home)

_____ Career

_____ Money

_____ Health

_____ Friends and Family

_____ Significant Other/Romance

_____ Personal Growth and Learning

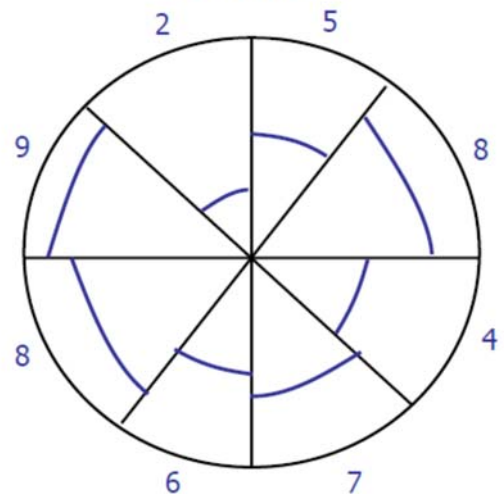
_____ Fun, Leisure and Recreation

WHEEL OF LIFE INSTRUCTIONS

The 8 Sections of the Wheel of Life represent balance.

- Please change, split or rename any category so that it's meaningful and represents a balanced life for you.
- Next, taking the center of the wheel as 0 and the outer edge as 10, rank your level of satisfaction with each area out of 10 by drawing a straight or curved line to create a new outer edge (see example)
- The new perimeter of the circle represents your 'Wheel of Life'. Is it a bumpy ride?

EXAMPLE



Please return to Rick via email at: Rick@RickWickizer.com.