



Individual Client Intake Form

You are the star of your own life! Clearly, it is important that your coach understands as much about you and what's on your mind so that we can map out our work together collaboratively.

The journey begins with us making a connection to get acquainted and begin to understand your motivations and your aspirations for coaching.

To learn more about you and prepare for the most productive dialogue, please take about 30 minutes to complete and return this form at least one day before our scheduled time. Rest assured that the information you share would be treated as confidential. And, feel free to use additional paper if needed.

Please return the completed form by email, fax, or mail allowing the receipt of the form at least 1 business day prior to our scheduled session.

By email: pearl@benchmarkmaven.com

By fax: 978-824-2018

By mail: 133 Oak St., Methuen, MA 01844, USA



Contact Info		
Name		
Home Address		
Work Phone and ext.	Mobile Phone	Home Phone
Email (work)	Email (preferred)	Website
Facebook	Skype	LinkedIn
Personal Info		
Birth Date: No. of Siblings: Language(s) spoken:	Marital Status: No. of Children: First Names and Ages:	Previous Coaching? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, Type? Length of Time:
Referred by (name, phone, email)		
Have you heard of Conversational Intelligence® (C-IQ) previously? If so, how?		



Formal Education (include degrees, concentrations, schools)

Informal Education (non-degree programs, special training, and certifications)

What would you like me to know about your unique cultural background? What is the story behind your name? What are some of the ways you identify yourself (e.g. gender, race, diverse roles, personal interests, where you grew up, etc.)

Work Info

Organization

Title

Department / Group / Team



Work Address	Industry
Time in this Position:	No. of Direct Reports:
Supervisor's Name:	No. of Direct Reports:
Time in this Position:	
Challenges and Opportunities Please answer as candidly as you can. There is no right or wrong answers.	
1. On a scale from 0 to 100%, what percentage of your weekly time at work is spent in conversations (with employees, clients, partners, suppliers, etc.)?	
2. What is the difference in the way you lead conversations (with employees, clients, partners, suppliers, etc.) ten years ago and now?	
3. On a scale from 0 to 100%, what percentage of your conversations in business are effective?	
4. What is the one thing you believe blocks effective conversations the most at work?	



5. Describe what success (at work and in life?) would be to you.

6. What makes “now” the right time to work with a coach?

7. Describe a few of your proudest accomplishments in your life so far.

1.

2.

3.

8. What inspires about your current job or career? What do you like the least?



9. In fewer than 50 words, describe the cultural environment at work.

10. What is the main pressing issue that is holding your organization or team back?

11. If you could change three things about the conversations you have, what would you change and why?

1.

2.

3.

12. What are five habits you do consistently to have positive, productive conversations (at work)?

1.

2.



3.

4.

5.

13. What are three results you want to accomplish through coaching?

And, when you are successful, what difference do you envision these results making in your life?

1.

2.

3.

14. What are three words or phrases you would use to describe yourself?

1.

2.

3.

15. What are three words or phrases others who know you well would use to describe you?



16. On a scale of 1 to 5, how familiar are you with the way in which our brain and effective, trusting conversations are intimately linked? (1 not familiar at all; 2 have read some on the topic; 3 took training(s); 4 well-trained and practicing daily; 5 mastered, teaching, and still researching)

17. If there is one thing that you are more aware of now that you invested time to fill in this questionnaire, what is it?

18. Anything else you would like to share now?

Your Signature

Today's Date