



Coaching Intake Form

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Name:

Date of Birth:

Contact Information:

Email:

Cellphone:

Your Goals

What are the top three goals you want to achieve in the next three months?

- 1.
- 2.
- 3.

What are the three most important changes you want to make in your life over the next three years?

- 1.
- 2.
- 3.



Complete the character strength assessment at the below link

Identify your top 5 VIA Character Strengths:

- 1.
- 2.
- 3.
- 4.
- 5.

<https://www.viacharacter.org/www/Character-Strengths>

Personal History

What would you say have been the greatest accomplishments in your life to date?

What is the most difficult challenge you have overcome?

What is a dream or goal you have given up on?

What part of yourself if any, have you given up on?

Who are or have been your major role models? Would you be willing to add some? Why?

What major transitions have you had in the past three years?

Your Life

Who are the key people in your life and what do they provide for you?



Is your life one of your choosing? If not, which parts are being chosen for you?

On a scale of 1 (lowest)-10 (highest), what number represents your current level of stress?

List your current primary sources of stress.

- 1.
- 2.
- 3.

List five things you are merely tolerating in your life. This can be anything.

- 1.
- 2.
- 3.
- 4.
- 5.

What discourages or takes away your motivation?

What situations are obstacles in your life?

What is your highest excitement?

Do you meditate? If yes, why and how often?



Do you exercise? If yes, why? Please explain how and how often.

Coaching You

List five characteristics of your dream coach.

- 1.
- 2.
- 3.
- 4.
- 5.

What would you like me to do if you get behind in your goals?

How will you know when you are receiving value (ie. your money's worth) from the coaching process?

How can I best support you in the coaching relationship?

Using each number once, place the following in order of importance.

Rank using 1 (most important) – 10 (least important)

- ___ Brainstorming strategies together,
- ___ Support, Encouragement, Validation
- ___ Accountability, Checking up on Goals
- ___ Suggesting or Designing Action Steps
- ___ Strategic Planning
- ___ Insight into Who You Are and Your Potential
- ___ Exploring and Removing Blocks and Obstacles to Your Success



- ___ Working through Self-Improvement Programs Together
- ___ Painting a Vision of What You Can Become or Accomplish
- ___ Directness: Asking Hard Questions; Challenging You to Move Forward

Potential & Possibility

What is your personal and professional vision?

Personal Vision:

Professional Vision:

What would you like to contribute to the world?

On a scale of 1 (low) – 10 (high), rate the quality of your life today.

Background of Inner Work

Describe the inner work you have experienced and what methods were used.

