



Intake Information

This information will remain private & confidential. The answers are all voluntary.

First Name _____ Name you would like to be called _____

Last Name _____

Home Address _____

Other Address _____

Phone (Mobile) _____

Phone (Home) _____

E-mail address _____

Date of birth _____

Occupation _____

Employer's name _____

Length of time at current employment _____

Marital status _____

Significant Other's Name _____

Names and ages of children

Name _____ Age _____

Name _____ Age _____

Name _____ Age _____

Name _____ Age _____



Intake Questionnaire

How satisfied are you with different areas of your life today?
Completely Dissatisfied 1 -> 10 Completely Satisfied

- _____ Physical Health
- _____ Mental/Emotional Health
- _____ Career/Employment Satisfaction
- _____ Financial Stability
- _____ Marriage/Romantic Relationship
- _____ Home Life (Immediate Family)
- _____ Extended Family (Relatives, In-laws)
- _____ Friends/Social Life
- _____ Relaxation & leisure time (vacations)
- _____ Recreation and hobbies (sports, programs, activities, collecting)
- _____ Spiritual Health
- _____ Religious Life
- _____ Physical Comforts (house, car, vacation property)
- _____ Savings and Investments
- _____ End of life (wills, estates, planning, preparation)

Date _____



Intake Survey

Have you ever worked with a coach? Yes No

What 2 or 3 qualities do you expect from me as your coach?

What do you hope coaching will do for you?

What is one word you would use to describe yourself? _____

What is one word your family would use to describe you? _____

What is one word your friends would use to describe you? _____

What is one word your colleagues/work associates would use to describe you? _____

Do you have any experience with breathing exercises? Yes No

Do you have any experience with yoga? Yes No

Do you have any experience with meditation? Yes No

In a typical week, how many times do you exercise? _____

In a typical week, how many meals (not including fast food) do you eat? _____

In a typical week, how many alcohol drinks do you have? _____

In a typical week, how much do you smoke (cigarettes or other)? _____

In a typical night, how much sleep do you get? _____

What is one of your current strengths? _____

What is one of your current opportunities? _____

What is one of your current weaknesses? _____

How long have you lived at your current address? _____

Are you planning on relocating/moving? Yes No

Are you currently enrolled at any schools/continuing education programs? Yes No

Do you plan to enroll at any schools/continuing education programs? Yes No

Are you or have you ever been in counseling or therapy? Yes No

Do you currently take any medication(s) for mental or physical reasons? Yes No

Do you have any allergies? Yes No

In case of emergency who is your primary contact? _____

Cell # _____

What else would you like me to know about you? _____

How did you find me? Referral Website Coach Listing Linked-In Facebook Other _____



The Discovery Call

- We begin with a short (~30 min) no fee, no risk, "discovery" call to discuss the expectations of both parties and ensure that there is a good 'fit' or "chemistry".
- If I do not think we align, I will recommend you to a more suitable colleague.
- Completing pages 1-3 of this document in advance is helpful, but not mandatory.
- During the call we will discuss your goals (long and short term)
- I will try to answer any questions you may have about coaching
- I will make a written recommendation (or 2) for a package of services following the call.
- The discovery call is a two way conversation, so guidelines (last page) are entirely relaxed.

Sessions

- Sessions run for 50-60 minutes
- I can provide 30 minute sessions for those with limited time (but prefer not to)
- Sessions begin with breathing, stretching and grounding exercises that take less than 5 minutes.
- Upon request the exercises can be lengthened or shortened but not eliminated.
- Coaching is a client-led process based on your perspectives, opportunities and journey so you select the topic (topics) and goal (goals) for the session.
- All information is private and confidential. I am bound by the ICF code of ethics.
- You will experience longer than natural periods of silence. This is me creating space for you to dig deeper with your thoughts and emotions and is entirely intentional.
- I will check in to see how you are feeling before closing/ending the session.
- I finish the session with 1-2 minutes of meditation, and a brief summary
- Sometimes activities or readings will be recommended as follow up to the session
- I prefer to schedule the same time and day of the week to create continuity and routine
- I maintain a logbook for the ICF standards and credentials. Participation in sessions implies consent to my keeping a record of your name and date (only) in case of audit.



The Process

- Coaching engages individuals who would like to experience
 - a) personal development and growth (self-clarity and discovery)
 - b) stress and anxiety reduction (physically or emotionally)
 - c) achievement (goal setting, behavioral change, transformation)
- In most cases, clients seek some level of coaching in *all three segments*
- Coaching is a process and sometimes the results are immediate and obvious.
- Sometimes many small shifts (the "2mm" shift) will result in a large change but require patience and dedication.

Monthly Fees

- I send invoices each month (a few days into the next month) for sessions
- If you have to miss a meeting you will not be billed for it.
- Receipts for payment are provided upon request and can be detailed as required.
- My preferred method of payment is e-transfer.

My Coaching Philosophy

- ✓ My goal is to enrich your life and to make you a happier and healthier individual
- ✓ Coaching as a modality, continues to make huge progress and create amazing outcomes.
- ✓ Each week there is additional scientific proof of the many benefits of coaching, and meditation. Feel free to do your own research.
- ✓ I have chosen to help others and do so with passion, energy and personal investment
- ✓ I will remain punctual, responsible, responsive and understanding of my clients
- ✓ I arrive prepared and give 100% effort to each session
- ✓ Take pride that you have made it to this point. Many people would like to improve their life, but do not have the courage, ability or strength to take a step towards change.



Session Guidelines

By minimizing distractions and interruptions, we can create and build upon a trusting relationship, that is essential to the coaching process.

I will create and repeat a positive and safe environment for you.

Your focus, attention and participation is required for all sessions.

1. Cell phone (including texting) and home phone use is not allowed during sessions
2. If you would like a session recorded and sent to you let me know before we begin
3. There is a 15 minute grace period if you are late. If I am >10 minutes late, there is no fee
4. There are no 'breaks' (bio, snack, meal, drink, cigarette, phone) once we begin
5. If you need to end early, let me know in advance so I can adjust our timing accordingly
6. If you have a pet(s) make sure they are prepared for the duration of our session
7. I won't coach while you are partaking in another activity (i.e. driving, exercising)
8. If taking notes have your pen & notebook ready.
9. Background noise is unavoidable, take efforts to minimize it.
10. Until further notice, all sessions are virtual (via Zoom). If you have not used Zoom, it is as easy as finding my e-mail invitation, and clicking 1 link.

If you have administrative concerns or questions, please call/text me 416 904 3044 or email me robgcoaching@gmail.com anytime to discuss (but not session times)