

Client Profile for Coaching Series

This profile is designed to be a “reflective document.” Please take your time to truly reflect on your responses so that you can focus on making the most of this coaching relationship for your success.

NAME

DATE

MAILING ADDRESS

CITY/STATE/ZIP

HOME () _____ WORK () _____ CELL () _____

EMAIL

OK TO CONTACT: YES NO

DATE OF BIRTH

PROFESSION

HOURS PER WEEK

KEY PEOPLE IN YOUR LIFE:

<i>NAME</i>	<i>RELATIONSHIP TO YOU</i>
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

(1) As of now as we begin your program, describe your view of the coach's role and what you expect and desires from me?

(2) Describe 3 or more areas that you want to focus on during our coaching relationship; In order of importance write a simple statement, in first person & present tense, that describes what the result will look like to you.

For example:

BE MORE PRODUCTIVE

I have a system of follow up for calls and letters. I'm on time. I get all tasks accomplished, eliminating a sense of overwhelm. I have a realistic goal for increased income.

(3) When you attain these results, how will you feel?

(4) Describe 3 or more skills you want to improve OR the behaviors you'd like to change.

- (10) Describe 3 or more of your most important beliefs.
- (11) List 3 or more 1 to 3-year goals (specific, measurable, dated)
- (12) List 3 or more 10-year goals (specific, measurable, dated)
- (13) How will you measure success? How will you know that you've achieved these goals? Please be as specific as possible.

Your Current Mode of Operation

- (14) Some ways I celebrate successes are...

- (15) The process I use to make decisions is....

- (16) I renew myself physically, mentally, emotionally and spiritually by...

- (17) Things I love to do are...

- (18) I feel most alive when...

- (19) I feel best about myself when...

- (20) What I would change in the world if I could is...

Your Future Vision

(21) Imagine that you are at the end of your life and are reflecting on all aspects of it. Look at each of the areas below and describe what you've achieved in each area that has left you feeling successful and fulfilled.

Your family life looked and felt like this:

Your social life (friends, community, volunteer work, etc.) looked and felt like this:

Your use of your talents & gifts (athletic, artistic, musical, etc.) looked and felt like this:

Your physical, mental, emotional & spiritual well-being (how you took care of yourself) looked and felt like this:

The kind of work (activities & responsibilities) that you found fulfilling looked and felt like this:

The kind of work environment (people, place, setting, culture, etc.) that you found fulfilling looked and felt like this:

Your financial rewards (the income & financial status that you achieved) looked and felt like this:

(22) VALUES EXERCISE: CIRCLE THE 5 VALUES THAT ARE MOST IMPORTANT TO YOU

- | | | |
|-----------------------|--------------------|------------------|
| Achievement | Creativity | Perseverance |
| Advancement | Fun | Personal growth |
| Adventure | Financial security | Physical fitness |
| Affluence | Fame | Power |
| Authority | Family | Privacy/solitude |
| Autonomy | Friendship | Recognition |
| Balance | Happiness | Relationship |
| Beauty | Health | Respect |
| Belonging/affiliation | Humor | Responsibility |
| Clarity | Intelligence | Risk |
| Challenge | Inner Harmony | Sensuality |
| Change | Influence | Security |
| Collaboration | Intimacy/love | Stability |
| Community | Integrity/honesty | Spirituality |
| Competence | Justice/fairness | Status |
| Competition | Knowledge | Vitality |
| Contribution | Loyalty | Wealth |
| Courage | Orderliness | Wisdom |

(a) List 3 high points in your life – 5 peak experiences that made you feel really wonderful

(1) _____

(2) _____

(3) _____

(b) Describe the qualities or characteristics of each of these high points. What was it about them that made you feel so wonderful? (e.g., fulfillment, satisfaction, etc.) Please be as specific as possible.

(1) _____

(2) _____

(3) _____

(c) List 3 of your 'hot buttons' – situations or attitudes that really aggravate you:

(1) _____

(2) _____

(3) _____

(d) Describe the qualities or characteristics of each 'hot button.' What is it about them that make you feel so aggravated?

(1) _____

(2) _____

(3) _____

Based on your review of the above 4 explorations, what would you say are your CORE VALUES?

(1) _____

(2) _____

What must change in order for these CORE VALUES to be honored more fully in your life?

(23) The biggest challenge you have overcome is:

(24) What you are most proud about your life is:

(25) If I trusted my coach enough to say what my secret passion is I would say: