

INFORMATION SHEET

Ed Hale

1055 Amber Way
Rockwall, TX 75032

EMAIL: ed@QuickStepCoaching.com 903-262-4955

Professional Coaching includes an initial assessment with weekly telephone sessions, and perhaps email communication. The following will give me some basic information about how best to contact you in case of an emergency or a change in schedule. Keep a copy for yourself and send one to me, preferably as an email attachment or send by post mail.

Please print clearly.

Date: _____ Referred by: _____

Name: _____ DOB: _____ Age: _____

Home Address: _____

Occupation: _____

Business Name: _____

Business Address: _____

Home phone: _____ Business Phone: _____

E-Mail Address: _____

Messages can be left at (*check all that apply*): HOME [By: Mail Text Phone]

BUSINESS OFFICE [By: Mail Text Phone]

Preferred place and means of communication with messages: _____

Names of important people in your life (spouse, partner, children, friends, etc.):

Emergency Contact Person: _____ Phone: _____

Religious Background (*optional*): _____

Other information you want me to know about yourself:

CLIENT INTAKE FORM

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The following information will assist me to understand you and how to be your partner in moving from where you are now to where you want to be. Complete what you think is important and disregard the rest. Please email your responses back to me before our first session.

1. Tell me in a paragraph or two something about your personal background, anything that you believe will help me to understand you and to better support you.
2. What are the top 5 accomplishments, thus far, in your life?
3. What have been your major disappointments?
4. What best motivates you?
5. What does success mean to you?
6. What concerns and/or challenges have taken most of your attention the last 12 months?
7. How will you know if coaching is effective for you?
8. What might prevent you from making the most of our coaching relationship?
9. What specific challenges or problems would you like to resolve?
10. What tolerations would you like to eliminate (things you are just putting up with now)?
11. Are there any fundamental changes or shifts you would like to make in your life right now?

COACHING PREPARATION FORM

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Date: _____

This weekly update is a way to prepare you to get the most out of our time together. This document is used to track progress collaboratively over time and for me to review before our sessions. For maximum benefit, email this completed form the day before each session. *(Save this document in a file on your computer.)*

Periodically, it may not be convenient if you are traveling or have other disruptions, so we will also set the agenda verbally at the beginning of each session.

1. What I have accomplished since our last session:

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2. What I didn't get done, but intended to do:

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3. New goals, challenges and problems I am facing now:

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4. I want to discuss during our session:

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