

NEW CLIENT INTAKE

Questionnaire



Best Contact Number:

Preferred Email:

Preferred Meeting Day/Time(s)

ESTACAR

THE ART OF SELF LEADERSHIP

"Success comes from knowing that you did your best to become the best that you are capable of being."

Coaching is not therapy or counseling, which pairs a mental health professional with a client who may be struggling with an illness or disability. It's not mentorship, in which a professional is paired with a more experienced professional. Coaching is also distinct from a training relationship, where a teacher or trainer agrees to share their knowledge or skills with a client for a short period of time. Coaching is a forward focused partnership that supports individual development and skills that can impact the greater goals and success of the organizations, families and community that individual serves.

Coaching can help fill in the gaps in our master plans and clarify the path from where we are to where we want to be. It is a partnership between the coach and the client designed to help the client explore their options, focus on their goals, and create a personalized action plan.

Highly motivated individuals and organizations are utilizing executive coaching. Some benefits of Executive Coaching are the following:

1. See yourself more clearly. This sounds simple, but is actually very important. Research has shown that most of us don't see ourselves very clearly and that it matters: accurate self-awareness in leaders is highly correlated with organizational effectiveness and profitability, and employees prefer to follow leaders who see themselves clearly (and are willing to share their perceptions). Throughout the coaching engagement, your coach will also share his or her perceptions of you, based on observation of you and your interactions with others. Most important, he or she will help you build skills to see yourself more clearly: to question your assumptions about yourself, get curious about where you're strong and where you need to grow, and learn to see yourself with "fair witness" eyes.

2. See others more clearly. Over the years, we've often seen leaders run into problems because of their inaccurate assessments of those around them. They may lose good employees because they don't recognize and support their capabilities, or keep poor performers too long because they think they're better than they are. They may stumble politically because they over- or underestimate someone's ability to have an impact on their career success. A good and insightful coach will often have more neutral and accurate perceptions of those around you than you will, and will share those perceptions with you (especially if he or she is doing other work in your organization). And — because skilled coaches work to make their coaching clients independent — he or she will also help you apply the same mental skills you learned for seeing yourself more clearly so that you can become more accurate in your assessment of others.

3. Learn new ways to respond. Marshall Goldsmith, perhaps the best-known executive coach in the U.S., wrote a book called *What Got You Here Won't Get You There*. It's a wonderful title because the idea is so true. We all have a set of capabilities and responses that may serve us well as mid-level employees but that won't help us as more senior leaders. For example, I coached a very smart and capable senior partner in a large company, who was still mostly just putting her head down and getting her work done — she hadn't learned to bring her team together and ensure they were all working in sync toward the highest-priority goals, nor had she defined what she really wanted to be known for. I was able to help her see that her success now depended not only on the quality of her own work but also on her ability to inspire and direct others. I worked with her to learn the necessary skills and shift her mindset — and she now has new, more useful tools in her "leadership toolkit" a new role within her firm that is more fulfilling and more flexibility to pursue personal passions.

4. Leverage your existing strengths. Having an effective and supportive coach can also help you see and leverage strengths that you already have but that you may be underestimating.

5. Build more productive relationships. Leaders can dramatically limit their effectiveness by only being willing or able to build strong relationships with certain kinds of people. And all too often, that means people like themselves — in background, race, gender, beliefs, or work style. A good coach can help you recognize that tendency in yourself and work against it, both by helping you see and question the limiting assumptions you make about people who aren't like you, and by offering you tools to support you in understanding and creating strong and vital working relationships with a wider variety of people.

6. Achieve what you want. This is the bottom line for an effective coaching engagement. A good coach can help you get clearer about your goals and dreams, and about what you're capable of doing in order to achieve them. He or she can also be a powerfully useful support system on your journey: someone who knows you very well and wants the best for you — but is a neutral third party. Unlike your family or your employees, your coach isn't dependent on you for his or her success. He or she can be honest with you about how you're doing, reminding you of what you've said you want to achieve and letting you know what you're doing that's supporting your intentions — or getting in your way. Finally, and most importantly, your coach can teach you new ways of thinking and operating, new skills that will allow you to better reach your goals and create the career you want.

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To get you the very best results from your coaching program, it is helpful for me to understand your personal history as well as your dreams and aspirations, personal and business. These questions are designed for you to reflect deeper into your personal and business goals before we start to build together. It is important that you know that there is no right or wrong answer, just whatever is true for you. These questions provide a means for me to understand you and your current position more closely and thus enable me to coach you to bring out your best!

Please type responses to questions and e-mail back to me 24h before your first coaching session

NAME

VISION & GOALS

What are the biggest goals you want to achieve in the next 12 months?

Key business/lifestyle changes you would like to implement/achieve?

What support would you like to hire for your business this year?

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What is the vision you have for your life i.e. the final destination or achievement, as you see it today?

What is the key outcome you would like to achieve from this coaching? *(Please do not hold back on this question. Make your outcome so big that if you were to achieve it, your decision to receive coaching would be the single most important decision you ever made in your life.)*

PERSONAL BACKGROUND

Please describe your current business: and/or role in your organization

What are your top tangible results you have achieved in your business to date?

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Describe your circle of influence. Your network circle size and Facebook likes, other social media stats or ways that you use to measure your influence?

Briefly describe your personal life:

What have been your greatest accomplishments?

What have been some achievements other people have achieved that you admire?

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How have you overcome a challenge or difficulty in your life?

What major transitions have you had in the past two years? *(i.e. entering or approaching a new decade of life, a new relationship, a new job, a new role, a new residence, changes in children's ages/ stages of life, separation, divorce, death of a loved one, birth of a child, marriage etc.)*

Do you have repeating patterns/habits in your life you would like to change?

What in the life that you are living, business or personal, is not fitting in with who you are?

POTENTIAL & POSSIBILITY

What are your strengths and greatest attributes?

What do you value most in life? And what about business?

What do you always find time for?

If you had all the money and resources needed, what would you be doing with your life?

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What would you regret not doing, having or becoming in your life?

Describe your life exactly the way you want it to be in 2 years from now. Please write this in present tense (I Am...) and use only positive phrases (I'm in a loving relationship i/o I'm not single). Be very specific and don't hold back. This part when finished should fill the whole page!

What would you like to contribute to the world?

I look forward to helping you move your life and business leadership to the direction of your dreams!