

Transformational Coaching Intake Package



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Professional Coaching Agreement

Date: _____ Client: _____

Coaching is a powerful experience – one where you will focus on solutions, forward momentum, and measurable action. Each session will stretch your comfort zone and challenge you to manifest your visions - whatever they may be. Expect “aha” moments, crystal clear life vision, and self-generated action.

This document, between Tiffany Grimes and the above named client, is a professional agreement for individual coaching sessions. Coaching sessions are 45 - 60 minutes in duration and may be done over the phone, skype, or face-to-face. Each coaching session/package fee will be paid in full in advance unless other arrangements have been agreed upon.

COACHING COMMITMENT

As a professional coach, my first commitment is to your privacy—you are assured confidentiality to the fullest extent. I uphold professional commitments, which include honesty, integrity, and forthrightness. The purpose of coaching is to clarify your vision and purpose, set goals, and create action plans in alignment with your intentions. We will focus on moving you forward according to your agenda.

CLIENT COMMITMENT

1. Make all appointments/calls on time, or reschedule at least 24 hours in advance to avoid being charged for a missed session.
2. Have account paid in full prior to coaching call (make arrangements ahead of time).
3. Complete the coaching material. You will receive a coaching manual with materials designed specifically to support you in achieving what you want. My request is that you focus, do the work, and use the materials provided as part of your coaching program.
4. Be honest, forthright, and bold. My job is to support you in those actions YOU have chosen for yourself. I invite you to use coaching as a safe context for examining what works for you as well as what stops you from moving toward your optimum success.
5. Prepare for your call by taking time to identify a focus for our coaching session and by arranging to be fully present when we meet for our coaching call or session.
6. Please tell me what works and what doesn't work in having someone support you.

Signature

As the client, you are fully responsible for your well-being during the coaching program. Coaching is not therapy or consulting; it is your responsibility to use other professionals such as therapists, accountants, financial planners, etc., (as appropriate) to support your growth and development. Our signatures on this agreement indicate full understanding of the coaching services to be provided.

Client

Date

Coach

Date

Client Information

Name:

Mailing Address:

Phone:

Email:

Profession:

Years in Profession

Client History

Have you ever worked with a coach, consultant, or counselor?

If yes, please give results (continue on back, if needed):

Is there anything you'd like me to know about you?

Client Coachability Assessment

How coachable are you?

Circle the number that comes closest to representing how true the statement is for you. This assessment helps discover how coachable you are, right now. (1=less true; 3=more true)

1. This is the right time for me to engage in personal and professional growth and development.	1	2	3
2. Working with a professional coach is a proactive step that I'm ready for.	1	2	3
3. I commit to being on time and prepared for all calls and appointments.	1	2	3
4. I agree to do the work and complete the exercises.	1	2	3
5. I am completely willing to let the coach do the coaching.	1	2	3
6. I am 100% committed. I keep my word and follow through.	1	2	3
7. I am willing to apply new concepts and engage in different ways of learning and creating shifts to enhance my growth.	1	2	3
8. I will speak honestly to the coach, telling the whole truth.	1	2	3
9. If I feel that I am not getting what I need from coaching, I will share this as soon as I sense it and ask for what I want and need from the coaching relationship.	1	2	3
10. I am willing to recognize, interrupt, and change the self-imposed limitations, beliefs, and behaviors which limit my growth and success.	1	2	3
11. I will communicate and express myself. I'll say what is working and what needs to work better	1	2	3
12. I am willing to seek additional resources, if needed.	1	2	3
13. I see coaching as a valuable investment for my present and my future.	1	2	3

Total: _____

SCORING:

- 32–39 Very coachable
- 25–31 Coachable
- 18–24 Somewhat coachable
- 13–17 Right now—not coachable

Client

Date

Coach

Date

VALUE ASSESSMENT

	Place an "X" next to the ten values you hold the most strongly.	2) Rank these ten in order of importance to you. (1=most, 10=least)	3) Then rank the ten you chose by how often they show up in your life. (1=most, 10=least)
Achievement			
Adventure			
Balance			
Beauty			
Children			
Commitment			
Community			
Communication			
Competition			
Contribution			
Creativity			
Education			
Empowerment			
Excellence			
Family			
Freedom			
Friendship			
Fun			
Higher Being			
Happiness			
Health/fitness			
Honesty			
Independence			
Integrity			
Intimacy			
Job/Career			
Leisure			
Love			
Loyalty			
Marriage			
Money			
Nature			
Peace			
Pleasure			
Recognition			
Romance			
Security			
Self-confidence			
Self-expression			
Self-improvement			
Solitude			
Spirituality			
Trust			
Wholeness			
Wisdom			

Desired Outcome

1. This is a great chance to create new possibility, work on developing a skill, break a habit, or explore a transition. What do you want? What inspired you to use a coach? **Be specific.**

2. How will you know when you get what you want? What will **specifically** change?

3. What is your personality like? How do you like to best be coached? Please be specific.

4. List the top **three** outcomes you specifically want at the end of your coaching program.

6. What area of your life needs greater balance? **Explain:**

8. What are you most passionate about right now?