**The Working Studio**

**Leadership Coaching Intake[[1]](#footnote-1)**

*Please send a copy of your latest resume, if you have one, in advance of our first meeting.*

The first section below is purely informational, so that I can contact you quickly, and have a quick sketch of your current role.

Later questions are designed to help you to begin framing your future and what you would like to accomplish in our work together. Your answers are helpful for me to understand who you are, and how I can best support you.

**Name: Date:**

**Complete Address:**

Ok to contact you here? (Y or N)

**Preferred Email address:**

Ok to contact you here? Y or N

**Best Phone Number to use to reach you:**

Ok to leave a message, either on voicemail or with a person? Y or N

**Which of the above ways is the best to use to contact you?**

**How did you hear about The Working Studio?**

**Why have you chosen this moment to begin coaching? Why is the timing right *NOW*?**

**Expectations: What would you most like to get from coaching?**

**Please capture your initial thoughts on your goal here. What are your top challenges right now, and what do you need to learn or do differently to meet them?**

**What supports do you have to assist you in reaching your goal?**

**What type of obstacles might affect your chances of achieving your goal?**

**Have you discussed your desire for coaching with your manager, and is s/he supportive?**

**Are you on LinkedIn?** Y or N

If yes, what is your LinkedIn URL?

**Work Context: Current Role**

1. Current employer, location, title, dates of employment:
2. Briefly summarize your role and key responsibilities:
3. Where are you most effective in your job:
4. Where are you least effective in your job:
5. How do your responses to questions 3 & 4 relate to the goal you wish to work on in coaching?
6. Are you having any specific difficulties in your current job? If yes, please briefly describe them.
7. List former positions, employers, dates, going back at least ten years if you have been in the workforce that long (or feel free to skip this if you provide a resume that covers it):
8. Please list your educational history here (School, major, what degree if you graduated, when you attended/graduated, beginning with most recent first), or substitute a resume for your response.
9. *Is there anything else you would like me to know about you, during our coaching, that I haven’t already asked?*

1. This information will be kept confidential. [↑](#footnote-ref-1)