

Intake Session Checklist

The Intake Session helps us develop a better understanding of the your coaching needs, our way of working and helps you understand what coaching is, what to expect and the role of the coach and client. It also clarifies admin, billing and deals with any questions you may have.

NAME: DATE:
 ADDRESS:
 P/CODE:PHONE: MOBILE:
 EMAIL:

WELCOME TO THE PERSONAL COACHING CENTER

As your coach, it's important for me to understand how you view the world in general and yourself in particular. Each person has a unique way of thinking and a unique way of interacting with those around them. This questionnaire will help me understand you better so that I can help you quickly.

PLEASE ANSWER THESE QUESTIONS SO WE CAN BETTER HELP YOU! Answer each of these questions as clearly and thoughtfully as possible, expressing the best of who you are. These are "pondering" questions designed to stimulate your thinking in a particular way that will make our work together even more productive. I suggest that you take a day or two to develop your responses to these questions. **(PLEASE ANSWER EACH QUESTION INDEPENDENTLY)!** Thank you.

Make sure your complete, scan and return this questionnaire 5 days in advance of your complementary review session. **Email [centerpersonalcoaching @ gmail.com](mailto:centerpersonalcoaching@gmail.com)**

Section	Coaches Question	Your Response
SOCIAL AND FAMILY RELATIONSHIPS	My family relationships are very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with my family relationships	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am close to my parents, and our relationships are healthy.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am close to my children, and our relationships are healthy.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	The people who matter the most in my life accept me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Social relationships are important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with my social relationships	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I have close friendships with people I can be myself around.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I have a good (real world) social network/ am part of social groups.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am good at connecting with new people.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I get along with my neighbors and the people in my area.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	How satisfied are you with your romantic relationship/s?	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me about about an area/s in your relationships that you'd like to make changes in (1 to 2 sentences).	
CAREER & EDUCATION ASPIRATIONS	Achievements are important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with my career achievements to date	Disagree 1 2 3 4 5 6 7 8 9 10 Agree

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	How fulfilled are you in your current work environment?	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I look forward to going to work each day	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I have a healthy & rewarding work/ life balance.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My career is offering me advancement and reward.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Strong working relationships are important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am happy with my current working relationships	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My working environment is positive and supportive	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Do you find contentment and fulfillment in your current career?	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I would urgently like a career change.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	If I died today, I would be happy with the legacy I'll leave behind.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me about an area/s in your career or education that you'd like to make changes in (one to two sentences)	
MONEY & PERSONAL FINANCES	Being financially capable is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am content with my current financial effectiveness.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I have enough money to meet my current wants.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I have enough money to meet my current needs.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I know my exact monthly outgoings.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I always know what's in my bank account/s.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Being generous to others is important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with how much I give to others	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Charitable contribution is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with how charitable I currently am.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am willing to step out of my comfort zone & take new risks to generate more income.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I worry a lot about my current financial situation.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me about about an area/s in your personal finances that you'd like to make changes in (1 to 2 sentences):	
HEALTH, RECREATION & LEISURE	Establishing a healthy work/ life balance is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I worry a lot about my current financial situation	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Physical health is critical to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree

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	I am very happy with my current physical health	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am very happy with my current physical fitness levels.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Having plenty of 'free' time is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am very content with the amount of free time I have.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My physical appearance is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am content with my current physical appearance.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I can handle my stress and anxiety levels effectively.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I very much enjoy life outside of work/study.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am able to do things I enjoy frequently.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I have room for improvements in my life outside of work and/or study.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me about about an area/s in your personal/social life that you'd like to make changes in (1 to 2 sentences):	
LIFE'S ROUTINE	Managing routine tasks around the home is important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with how I currently handle routine tasks.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am disciplined in paying my routine household bills.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I could be more disciplined in managing my bills & other important responsibilities.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Prioritizing my responsibilities is important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with how I prioritize my responsibilities	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	A well-managed home environment is essential to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am satisfied with my current home environment.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Dealing with home issues promptly is important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Home life would be easier if I had a better system in place for managing my routine responsibilities.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I worry a lot about my routine responsibilities.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My life would be so much easier if I were more disciplined in managing my routine responsibilities around the home.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me more about how you could become more efficient in managing your routine responsibilities (1 or 2 sentences)	
CONTRIBUTION & GIVING BACK TO SOCIETY	I am satisfied with how much I currently give back to society.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I regularly make a positive impact in the lives of other people.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree

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	I am satisfied with the amount of difference I make in the lives of others.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Leaving behind a meaningful legacy is important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am happy with the current legacy that I would leave behind.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I encourage and support those closest to me often.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My time is mainly spent focusing on myself and my immediate needs.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I get involved with and support a social initiative that I genuinely believe in.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Those closest to me find great value in me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My peers or co-workers find great value in me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Someday my children will be proud of the way in which I've lived my life.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I could make more effort in contributing back to society.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me about how you could begin making a greater impact in your culture or society (1 or 2 sentences)	
MENTAL, EMOTIONAL & SPIRITUAL HEALTH	Being mentally healthy and strong is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I currently feel I am very mentally healthy and strong.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Being emotionally healthy and strong is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I currently feel I am very emotionally healthy and strong.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am confident and secure in who I am as a person.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	The way in which I am currently living my life is very fulfilling.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am very content with the way in which I am currently living my life.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Being spiritually healthy and strong is very important to me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I currently feel I am very spiritually healthy and strong.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I regularly invest time into developing myself spiritually.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	I am consistently competent at managing my emotions.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	My emotions will often manage me. I am undisciplined in self-control.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Negative and destructive emotions will often get the 'better' of me.	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me about how you can begin developing yourself mentally, emotionally and spiritually (1 to 2 sentences)	

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GENERAL LIFE-EVALUATION QUESTIONS	What immediate changes do you think you need to make to bring more balance into your life?	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me what you think your ideal life would be like?	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	What are the main challenges (or difficulties) that you're facing in bringing your life back into balance?	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	What words might other people use to describe you? (In relation to how balanced you are)	Disagree 1 2 3 4 5 6 7 8 9 10 Agree
	Tell me what areas of your life you think are working really well for you at the moment? (e.g.. Family, work, fitness etc)	
Your Personal Vision!	The best case scenario' description of what you would like to achieve or accomplish in the next 12 months - in your social and family relationships (1or 2 sentences)?	
	The best case scenario' description of what you would like to achieve or accomplish in the next 12 months - with your contribution & giving back (1or 2 sentences)?	
	The best case scenario' description of what you would like to achieve or accomplish in the next 12 months - in your career & educational aspirations (1or 2 sentences)?	
	The best case scenario' description of what you would like to achieve or accomplish in the next 12 months - in your mental, emotional and spiritual life (1or 2 sentences)?	
	The best case scenario' description of what you would like to achieve or accomplish in the next 12 months - in your personal finances and money (1or 2 sentences)?	
	The best case scenario' description of what you would like to achieve or accomplish in the next 12 months - in your social and family relationships (1or 2 sentences)?	
Life Coaching Questions	Energy and passion: Where do you get your energy – what motivates and turns you on? What are you passionate about?	
	Emotion: What moves you to tears of joy/sorrow?	
	Pleasure: How do you like to enjoy yourself? What do you enjoy doing?	
	Stress release: What do you find works for you to release stress?	
	Responsibility: Where are you likely to be most irresponsible?	

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	Control: What emotion (anger, fear, anxiety, etc) makes you feel most out of control?	
	Sabotage: How might you sabotage your coaching progress and our professional relationship?	
	Results: How will you know how effective our coaching has been?	
	Coaching preference: How can I best coach you? For instance, do you like lots of structure or things done informally or a mix of both?	
	Learning style: Do you find you learn best predominantly by listening, seeing or doing, or an equal combination of all three?	
	Goals: Do you understand that I support YOU, not just your goals?	
	Values: What are your values – the things in life that are really important to you? If you are not sure of this we will find out as part of the coaching process.	
	Business/career opportunities: What business/career opportunities you are currently not making the most/anything of?	
	Personal Aspirations: What are three personal desires you are currently not pursuing?	
	Poor relationships: Is there anyone in your life who is constantly putting you down, making you feel inadequate or whom you feel you have to tread carefully around?	
	Challenges: What is the biggest challenge you have in your life right now?	
	Priority: What is your most urgent problem?	
	Control: What emotion makes you feel most out of control?	
Career questionnaire (if required)	What do you want from your career / job?	
	What are your key career goals?	
	What skills or knowledge are you developing?	
	How do your career goals support your personal goals?	
	What do you want to do to support your career goals?	
Personal Questions	What accomplishments must, in your opinion, occur during your lifetime so that you will consider your life to have been satisfying and well lived – a life of few or no regrets?	
	Write down 2-3 things that are really working well for you.	
	What would like from your coach?	
	What do you do when you're really up against it?	

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	If you had a 5-year goal and you had the continuing services of a coach to help you make it happen (money is not an issue), what would that goal be? What differences would working with a coach make?	
	What's missing in your life? What would make your life more fulfilling?	
	What activities have special meaning for you?	
	Who are the significant people in your life?	
	What have been the significant events in your life?	
	Tell me about a time(s) when you were operating at "peak performance", when things were going well for you, you were "on top of your game", you were pleased with what you were doing or accomplishing. ✓ What was going on? ✓ Who else was involved? ✓ How did you feel? (This is no time for modesty – tell it like it was.)	
	Do you believe in God or in the concept of a higher power? If so, describe the most useful and empowering aspects of your relationship with God. If not, what reference point do you use?	
Quick evaluation questions	What would you like from your coach during your sessions: score on a scale of 1 -10 where 1 is not at all important and 10 is extremely important;	
	1. Gaining clarity of issues	
	2. Understanding what is important and what motivates me	
	3. Exploring and understanding what is holding me back	
	4. Gaining an insight into who I am, my strengths, capabilities and potential	
	5. Providing encouragement and support	
	6. Helping define goals	
	7. Helping to identify action and next steps	
	8. Challenging you with difficult questions	
	9. Providing honest and direct feedback	
	10. Making you accountable for your goals	
	11. On a scale of 1 -10 how happy are you with your life right now? What are the things that make you happy?	
	12. On a scale of 1-10 how motivated are you in your work and personal life? What motivates you?	
	13. On a scale of 1 -10 how stressed do you feel right now – what are your key causes of that stress?	
Understanding your goals!	What are the 3 biggest changes you want to make in your life over the next 5 years?	
	What 3 goals do you want to achieve within the next 3 months?	
	What are you Goals and Priorities today?	

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	If anything was possible what would you wish for?	
	What have been your 3 greatest successes to date?	
	What is the greatest challenge you have had to overcome?	
	What major changes have you been faced with over the last couple of years?	
	What is most important to you in your life and why?	
	Who are most important to you in your life – what do they provide you with?	
	Is your life one of your choosing? If not who is choosing it for you?	
	List 5 things that you feel you are 'putting up with' right now? What would you like your coach to do if you struggle with your goals?	
	How will you know when you are receiving value from the coaching process?	
	What approaches motivate and demotivate you?	
	What is most important to you – what are your values?	
What are your Coaching expectation!	What do you want to achieve from Coaching?	
	Do you have any specific Goals or issues to resolve/meet?	
	What do you want to achieve from coaching; long, medium, short term	
	How will you know when you have achieved those goals?	
	How will you know when you have achieved those goals?	
	Why did they seek coaching now? This 'treasure' is key for their motivation	
	What do you want to make sure you get from the coaching relationship? (please write down 2 or 3 things that occur to you)	
	How do you want me to be as your coach?	
	What do you want to work on in coaching?	
	What two steps could you take immediately that would make the greatest difference in your current situation(s)?	
	What can I say to you when you are most "stuck" that will return you to action?	
	If you trusted your coach enough to tell him or her how to manage you most effectively, what tips would you give?	

ADMIN - This sections covers the business part of the coaching program! It is designed so you understand payments & all the practical information you need!

Agreement Signed & Returned?	If not, do you have any questions regarding the agreement? Please note that it must be signed and return before next session.
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Coaching Ethics & Conduct	Please check out our code of ethics document!
Payment	<ul style="list-style-type: none"> ✓ Payments for first 3 months is split into two payment; 1/2 paid up-front, 1/2 paid in 30 days. Then on going monthly payments at required at the first of the month ✓ Confirm billing process is by Paypal
Admin & Logistics	<p>Review key points from Our Agreement:</p> <ol style="list-style-type: none"> 1. Missed and late appointments - the coach will wait for 10 minutes before reporting a missed appointment. 2. How appointments are set up - Appointments will be set up via Calendly https://calendly.com/admarketpros by the client. 3. If you cannot attend a meeting please provide at least 2 hours notice before the scheduled appointment. Cancellation can be done via phone, email and Calendly by either the coach or client. 4. We will discuss any any upcoming vacations/trips (yours and ours)
Set up next appointments	If not already, set next 2-3 appointments using https://calendly.com/admarketpros
COACHING PROCESS - PLEASE UNDERSTAND THIS IS WHAT YOU CAN EXPECT DURING OUR COACHING!	
What Coaching Is and what it is not	<ul style="list-style-type: none"> • Coaching is a relationship between you and me as your coach • You are the expert in your life. Coaching helps you connect to you, your wisdom and take action to create the life you really want • Coaching is 100% Confidential & Non-Judgemental • We ask for two-way confidentiality (This covers what you share too) • Coaching is NOT advice, counselling or therapy! • What is needed for each session - attendance, open mind, home work completed. • During each session we expect active interaction between you and the coach. We want you to be open and be ready to obtain results!
Your Coaching Philosophy	<ul style="list-style-type: none"> • Everyone is Unique – What coaching works for one person does not necessarily work for another. Together we will try different things, figuring out what works, and doesn't work, for you. • Goals and Results - One of the things that makes coaching different from many other therapies is our focus on action, change and results. Helping clients set an ecological goal is a key part of the coaching process. Because when we raise your awareness around the bigger picture and help you adjust your actions and goals accordingly - we remove surprises, you are more committed - and are more likely to obtain the results your are seeking! • An integrated Approach – Changes and challenges in one area of your life affect other areas of your life. It's all related, so together we will get a base understanding of what's going on in every area of your life right from the start. • Sustainable and Results focused Progress – The pace of coaching is dependent upon each individual. Coaching is not a sprint, but about moving forward towards your goals in a way that is sustainable and focused on results. • Efficiency and Effectiveness – If you're doing your part and I'm doing my job well, the work can be done in a short amount of time. You'll have all the tools you need during and after our coaching sessions.
What Coaching involves and what you should expect...	<ul style="list-style-type: none"> • Our sessions will be structured to provide you with actions and results based upon your needs. • Please understand that your goals and focus may change. • Ups & Downs are normal in coaching - as is reaching a plateau. The down cycle is where you can grow the most. • Please understand that at some point in our discussions I may: <ul style="list-style-type: none"> ⇒ Interrupt you ⇒ Get tough with you ⇒ Challenge you and Ask difficult questions ⇒ Repeat back what you have just said to ensure understanding. ⇒ Give you homework including forms/exercises/inquiries during/between sessions • As the Client you decide what we ultimately cover, how & when to end coaching

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	DO I HAVE YOUR PERMISSION?	
Role of Coach - What you can expect from us	<ul style="list-style-type: none"> • Our Coaching guidelines and Boundaries • I will be returning email and phone calls within one working day. • I will help you set, clarify and maintain focus on your goals • I will hold you accountable - for what you say you're going to do • I will help you establish your own solutions & strategies • I will encourage, support & believe in you even when you may not! <p>I will challenge you and help you recognize where you may be holding yourself back. Together we raise your self-awareness</p>	
YOUR ROLE - What we expect from you	<ul style="list-style-type: none"> • We expect you to be honest and open (and to tell me when you can't be) • You need to be willing to adopt a more positive outlook on self and life • We need you to return email within one working day. • We need you to be ready to be fully accountable for your life/decisions/actions • YOU are responsible for YOUR results. Success is directly related to your commitment and the effort you make! • We expect equality in the relationship between you and the coach. 	
Any questions?	<ul style="list-style-type: none"> • Do you have any questions for us about Coaching or our approach to helping you reach your goals and find the results you are looking to obtain? 	

FIRST COACHING SESSION WILL BE FOCUSED - Here is what you can expect from our first session!

Client HISTORY	<ul style="list-style-type: none"> • We will review your completed Life Map or ask and I will ask you to, "Tell me a little bit more about yourself?" 	
Coaching	<ul style="list-style-type: none"> • I will be coaching around Wheel of Life (if completed), or one of your small chosen topics 	
At least ONE action	<ul style="list-style-type: none"> • You can decide on the action you will take between coaching sessions. 	
Feedback & Learning	<ul style="list-style-type: none"> • At the end of the session I will be asking, "What is your Biggest Win from the session today?" 	
Questions?	<ul style="list-style-type: none"> • Do you have any questions for us this sessions, your homework, goals or results? 	