

# CLIENT COACH ABILITY 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 that 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. My commitment is to design my life with the guidance of a coach.	1	2	3
14. I see coaching as a valuable investment for my present and my future.	1	2	3
15. I have the funds to pay for coaching.	1	2	3

Total: \_\_\_\_\_

### SCORING:

- 38–45      Very coachable
- 31–37      Coachable
- 24–30      Somewhat coachable
- 15–23      Right now—not coachable

\_\_\_\_\_  
*Client*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Coach*

\_\_\_\_\_  
*Date*

# PROFESSIONAL COACHING AGREEMENT

Date: \_\_\_\_\_ Client: \_\_\_\_\_

This document, between \_\_\_\_\_ and the above named client, is a professional agreement for a coaching program. The coaching program contains an initial intake session and weekly coaching calls. This is a \_\_\_\_\_ Coaching \_\_\_\_\_ commitment, and includes \_\_\_\_\_ 5 \_\_\_\_\_ coaching calls and coaching materials. The intake session fee is \$ \_\_\_\_\_, paid in advance. The coaching fee is \$ \_\_\_\_\_, paid in full now, or by arrangement, paid monthly at \$ \_\_\_\_\_ per month, due on the first of the month.

## 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 wellbeing 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 ASSESSMENT

Date: \_\_\_\_\_

Name \_\_\_\_\_ Birthday \_\_\_\_\_

Birthplace \_\_\_\_\_ Age \_\_\_\_\_

Home Address \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Profession \_\_\_\_\_ Years in Profession \_\_\_\_\_

Relationship Status: \_\_\_\_\_

Number of children and ages \_\_\_\_\_

In case of emergency, call \_\_\_\_\_ (Name/Relationship)

at \_\_\_\_\_ (Phone Number)

Education (High School, College, Degrees, Trade Schools) \_\_\_\_\_

## Family History

Parent's Name \_\_\_\_\_ Age \_\_\_\_\_ Occupation \_\_\_\_\_

Parent's Name \_\_\_\_\_ Age \_\_\_\_\_ Occupation \_\_\_\_\_

Siblings (in birth order)

Name \_\_\_\_\_ Age \_\_\_\_\_ Name \_\_\_\_\_ Age \_\_\_\_\_

Name \_\_\_\_\_ Age \_\_\_\_\_ Name \_\_\_\_\_ Age \_\_\_\_\_

Have you ever worked with a coach, consultant, or counselor? Yes \_\_\_\_\_ No \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

# VALUE ASSESSMENT

	Put a checkmark beside the ten values you hold 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			
God			
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. What do you want? What inspired you to use a coach? Be specific.

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

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

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4. List the Top Three Desired life Goals you seek to achieve in life. Connect to a purpose.

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5. What Top Five Life Principles (values) guide your life right now?

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6. List your Top Five Waste-of-Life Items: time wasters, energy drainers, excuses, etc.:

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

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8. What is non-negotiable?

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9. What are you most passionate about right now?

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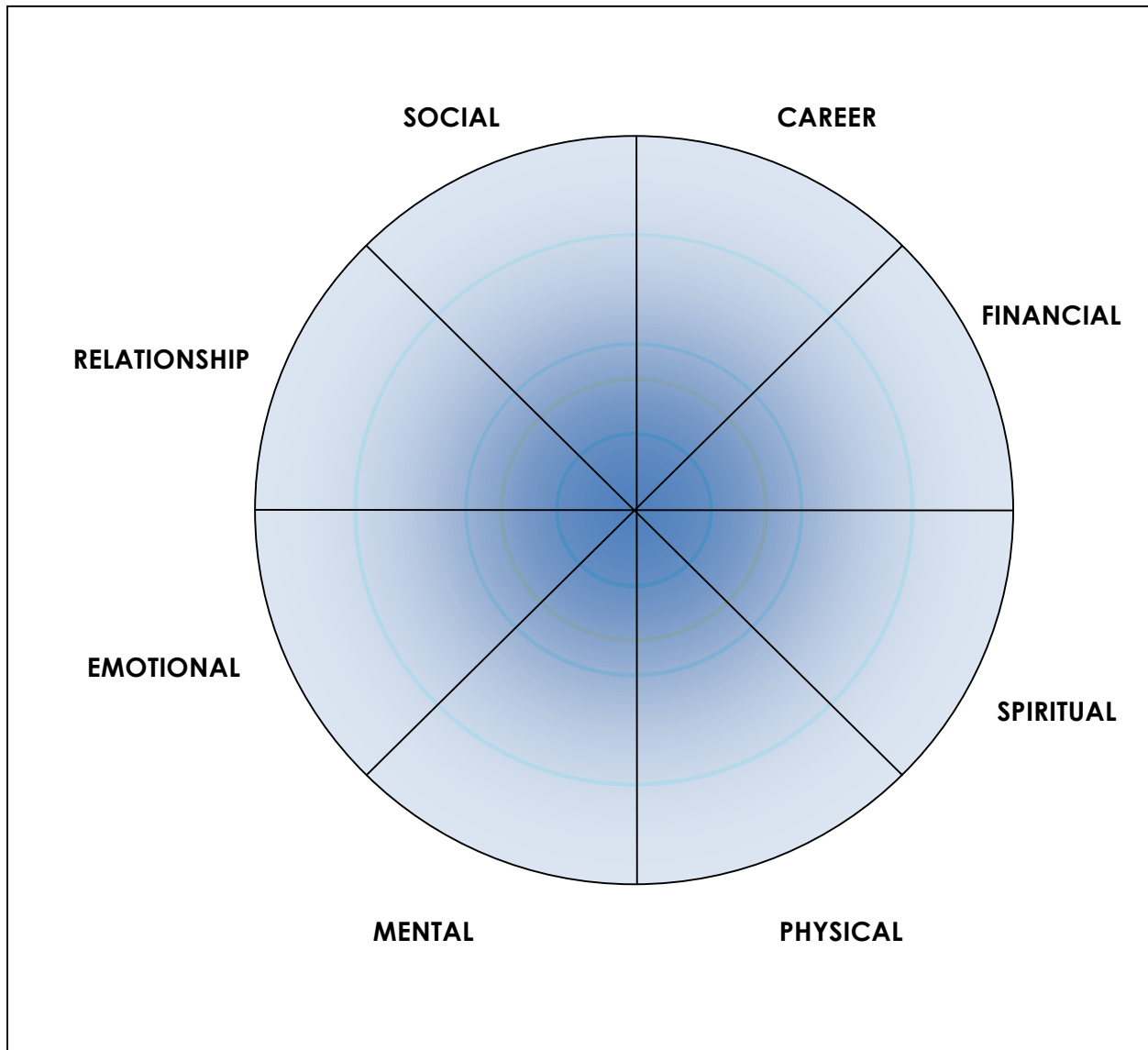
10. List the Top Three Outcomes you specifically want at the end of your coaching program:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# THE LIFE COMPONENTS

## BALANCE WHEEL

### GOAL ASSESSMENT STRATEGY



# GOAL DEVELOPMENT

Please copy extra sheets

## Life Balance Components:

- Emotional     Mental     Physical     Spiritual  
 Financial     Career     Social     Relationship

Specific Purpose: \_\_\_\_\_

Specific Short-Term Goal: \_\_\_\_\_

Specific Long-Term Goal: \_\_\_\_\_

Desired Date of Achievement: \_\_\_\_\_

Priority Action Step: \_\_\_\_\_

## Small Purposeful Steps

Task	Target Date	Step #	<input checked="" type="checkbox"/>

## Long Term Vision

Specific Term	Steps Completed

**Make a list of 101 personal goals – Circle your top 10 highest-priority goals**

1	35	69
2	36	70
3	37	71
4	38	72
5	39	73
6	40	74
7	41	75
8	42	76
9	43	77
10	44	78
11	45	79
12	46	80
13	47	81
14	48	82
15	49	83
16	50	84
17	51	85
18	52	86
19	53	87
20	54	88
21	55	89
22	56	90
23	57	91
24	58	92
25	59	93
26	60	94
27	61	95
28	62	96
29	63	97
30	64	98
31	65	99
32	66	100
33	67	101
34	68	



# LIVING A LIFE OF PURPOSE

What four goals will you fulfill in the following areas of your life in the next five years?

## Relationship/Family

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Spiritual

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Physical/Health

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Mental

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Emotional

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Social

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Financial

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Job/Career

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## LIVING WITH POSITIVE AFFIRMATION

- I choose to change all thoughts that hurt me.
- I choose to accept responsibility for everything in my life.
- I choose to seek to grow and improve daily.
- I choose to be forgiving and a more caring, compassionate person.
- I choose to learn from my past and I am moving forward.
- I choose to enhance my limited perceptions of the world, others, and myself.

## GUIDING YOUR BRAIN TOWARD CHANGE

- I have decided to change my mental environment for the better.
- I understand what I experience in my state of mind is projected outward.
- I know if my state of mind is one filled with doubt, fear, and conflict, I will project this state outward and it will be my experience.
- I acknowledge if my state of mind is one of well-being, love, and peace, that is what I will project and that will be my experience.
- I know where my mind goes, so follow my **emotions** and **behaviors**.
- I am willing to discipline my thoughts to achieve my goals.

# POSITIVE AFFIRMATIONS & DECLARATIONS

We all engage in continuous self-conversation about ourselves, other people, and our lives. This **self-talk** conversation influences our thinking, feelings, and eventually our behaviors. Too often a negative voice is the one we hear in our self-talk. Positive affirmations and declarations are a powerful way of replacing negative thoughts with positive statements of self-empowerment.

## Follow these guidelines to create positive self-affirmations:

- **Present Tense (“I AM”)**  
Take a stance and state your conversation in the present tense, as if it already exists - “I am...”
- **Positive**  
State your conversation in a positive way
- **Personal**  
Keep it simple, personal, powerful, and realistic for you
- **Passion**  
State and rehearse your conversation with passion
- **Practice**  
Repeat your affirmation and declaration many times each day. Practice for a minimum of 21 continuous days. Post the affirmation on a 3 x 5 card

## Examples of Affirmations and Declarations

- I am growing, trusting myself, and moving forward.
- I am strong and I am meeting all of my challenges.
- I am lovable, nurturing, and capable—I am reaching my desired goals.
- I am making this declaration for life-long health.
- I chose to trust myself, to make wise choices for my life, and I will continue to do so.

# MY PERSONAL AFFIRMATION & DECLARATION

Week #: \_\_\_\_\_

I am \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Week #: \_\_\_\_\_

I am \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Week #: \_\_\_\_\_

I am \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Week #: \_\_\_\_\_

I am \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# ALIGNMENT STRATEGIES

Check each item that is true for you. Transfer any not true items that you want to integrate into your life to *The Alignment Gap* on the upcoming page.

## Career/Lifework

1.	___	I am enjoying a career that is aligned with my vision and purpose.
2.	___	My work environment is nurturing.
3.	___	I have the certifications, degrees, and credentials for my profession.
4.	___	I have at least four close business associates.
5.	___	I devote one hour to reviewing and goal setting each week.
6.	___	I am at the top of my pay scale.
7.	___	I share the passion of my work with others.
8.	___	I continue to read and take continued education courses for further career growth.
9.	___	I keep my desk and office organized and meet my deadlines.
10.	___	I set a positive example by being ethical and following a rule of conduct.
11.	___	I am creative, energetic, and success-minded.
12.	___	I put enough time into my work and work smarter, not harder.
13.	___	I am a well-known professional and people receive benefits from me.
14.	___	I have a business/marketing plan and follow it often.
15.	___	I have a contract with a publisher for my book.
16.	___	I love what I do.
17.	___	I do informational interviews with those who wish to do what I do.
18.	___	I dress for success.
19.	___	I have a professional coach to guide my growth in my life work.
20.	___	(Other: _____ )

## Health/Well-Being

1.	___	I get enough sleep every night.
2.	___	I know what my body needs and I make sure I get it.
3.	___	I drink at least 48 oz. of water daily.
4.	___	I have health-minded associates in my life.
5.	___	I keep my stress level low and pace myself.
6.	___	I seek spiritual growth through daily affirmation.
7.	___	I get a medical checkup yearly and see my dentist every six months.
8.	___	I educate myself (books, magazines, etc.) about health, fitness, and healthful living.
9.	___	I enjoy humor and laughing, and take time for hobbies, travel, etc.
10.	___	I understand my feelings and manage my anger appropriately.
11.	___	I get up early and have a half hour of personal time just for me.
12.	___	I am working on my personal growth.
13.	___	I get assistance from counseling, coaching, or education professionals, when needed.
14.	___	(Other: _____ )

## Prosperity/Finance

1.	___	I stay well informed about money and finances.
2.	___	I have little to no debt and spend within my means.
3.	___	I have a financial record-keeping book to trace my cash flow.
4.	___	I have a financial advisor and am informed about tax deductions.
5.	___	I know how to create wealth and prosperity and I am wise with money.
6.	___	I have a manageable house mortgage, and dependable, safe transportation.
7.	___	I model myself after those who have done well financially.
8.	___	I provide a high quality of life for my family and myself.
9.	___	I have medical, dental, vision, and life insurance plans.
10.	___	I have a network of friends and associates who are financially responsible.
11.	___	I have a healthy belief system about money and finances.
12.	___	I'm a generous person.
13.	___	I teach my family about financial wisdom.
14.	___	My credit is good.
15.	___	My will and estate planning are complete; I am leaving an inheritance I feel good about.
16.	___	(Other: _____ )

## Lifestyle/Relationships

1.	___	I have healthy relationships with others.
2.	___	I have a healthy support group of family, extended family, and friends.
3.	___	My home is a warm and welcoming place.
4.	___	I am authentic and share warm smiles with those around me.
5.	___	I spend quality time with my partner/significant other doing fun activities.
6.	___	I communicate effectively, positively, and assertively and get great results.
7.	___	I have patience and understanding, and I support others.
8.	___	I express my gratitude and appreciation.
9.	___	I attend workshops; listen to tapes, read, and do whatever it takes to grow personally.
10.	___	I live my life with integrity and maturity and tell the truth.
11.	___	I ask for what I want and need without hesitation.
12.	___	I give at least 2 to 4 hours per month to community service.
13.	___	I am emotionally, mentally, physically and spiritually balanced.
14.	___	I am a person who is joyful, happy, and loves life.
15.	___	I do not live in the past; I know how to put closure to it.
16.	___	I have set my boundaries with others.
17.	___	I read to my family and encourage education in my home.
18.	___	I forgive others and ask forgiveness as well.
19.	___	I live my life according to how I want to be remembered.
20.	___	(Other: _____ )

# THE ALIGNMENT GAP

Write in any statements that were not marked "true" on your *Alignment Strategies Assessment*. Transfer your desired goals to the *Step-by-Step Goal Setting* sheet and then move toward action.

## Career/Lifework

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## Health/Well-Being

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- 
- 

## Prosperity/Finances

- 
- 
- 
- 
- 
- 

## Lifestyle/Relationships

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