**Close Coaching & Consulting**

**New Client Information Form**

**Part 1: Contact Information**

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| Contact and Personal Information |
| Name: | Birthday: |
| Position | Company/District |
| If District, Campus/School Name: |
| Address (Work): | City, State, Zip |
| Address (Home): | City, State, Zip |
| Work Phone: | Cell Phone: |
| Email – Primary: | Email – Secondary: |
| Fax: |  |
| Name/Relationship of important people in your life (spouse, partner, children, friends, etc. |

**Part 2: About You**

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| **Your History** |
| 1. What are three achievements you are most proud of? |
| 2. What are behaviors or skills did you develop or use in reaching these achievements that you can use with future endeavors? |

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| **Your Life** |
| 1. Who are or have been important people in your life? |
| 2. What do you admire and want to emulate about these people? |
| 3. What are the five most positive things in your life? |

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| **Your Self Today** |
| 1. What five to seven words describe you? |
| 2. What motivates you? |
| 3. What drains you? |

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| **Your Potential** |
| 1. What would you want your legacy to be? |
| 2. What do you want to accomplish this year? |
| 3. What do your want to accomplish in the next three years? |

**Part 3: Moving Forward**

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| **Getting Started** |
| 1. What will make our coaching relationship beneficial to you? |
| 2. How can I be most helpful to you in accomplishing your results? |
| 3. How will you measure the effectiveness of our coaching experience? |

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| **Previous Professional Development (for School District Personnel Only)** |
| 1. Have you completed Carolyn Downey’s 3 Minute Walk-through training? |
| 2. Have you completed trend Walk-through training? School View? Dana Center/Teachscape? |
| 3. Have you completed Coaching Training? If so, through what training organization? How many hours/workshops, classes? |
| 4. Please return your resume electronically with this form. (optional) |

**Part 4: Additional Information**

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| **What You Would Like Me to Know** |
| Please feel free to share anything with me about yourself that will assist us in creating a powerful coaching partnership. |

I have received and read the policies of Close Coaching and Consulting. Please check the appropriate line before returning this form.

\_\_\_\_\_\_ I accept the policies \_\_\_\_\_ I do not accept the policies