

# MCODE™ COACHING INTAKE FORM

*Practitioner Note:* We recommend that you walk your client through this on a video call to build relationship rather than sending on ahead.

## GET ACQUAINTED PERSONALLY

1. Start with a geography history:

A) Where have you lived? Where do you live?

B) What do you enjoy most about where you currently live?

2. What does Family look like for you?

3. What hobbies do you enjoy?

## GET ACQUAINTED PROFESSIONALLY

A) What is your role?

B) In a typical week, what do you spend the most amount of time doing?

*(Practitioner Note: Listen closely to responses. Tune into how the person spends their time actually, if they are frustrated or feel good about that, and whether they have allowed themselves to be overtasked or if they've been intentional)*

C) What do you enjoy most about your role?

D) What do you dread about your role?

On a scale of 1-10 (10 is high), rate the quality of your life in these areas.

*Practitioner Note: This isn't designed for discussion, rather for your awareness. Once you get through the list, you can certainly poke on one or two.*

Amount of Stress [    ]

Satisfaction In Your Role [    ]

Physical Health [    ]

Work Culture [    ]

People on Your Team [    ]

Where You Live [    ]

Living Out Your Purpose [    ]

## **ESTABLISH COACHING CLARITY**

Priority Things to Work on in Coaching

**90 DAY**

**1-YEAR**

What are the biggest changes you would like to see during our coaching engagement?

What do you see as the obstacles keeping you from achieving those changes?

What one major goal would you want to accomplish in the next 12 months?

## **YOUR LIFE STORY/HISTORY:**

What would you like me to know about you?

## **COACHING PREFERENCES**

Here is a list of different approaches to coaching. Which ones appeal to you:

- brainstorming together
- accountability; setting and checking up on goals
- suggesting or designing action steps
- support/encouragement;
- exploring/removing obstacles

*Practitioner Note: We realize you have an approach to coaching, we all do. This however should be a helpful data point for you to understand what your client views as success for your sessions. It doesn't mean you ignore your approach, but rather adjust appropriately to your client preferences.*

## **ANYTHING ELSE?**

Please share anything else you would like as we prepare for our first session.