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This employee coaching form template will help you streamline your coaching process — so you can track employee development seamlessly.If you invest your company's dollars in employee coaching or training, you'll want to know how well it works, right? Having a standardized planning and execution process in place will help you measure the return on investment (ROI) of your employee coaching program. This is where an employee coaching form comes in. It will help you streamline your coaching process — so you can track employee development seamlessly. Let's delve deeper into what an employee coaching form template is and how to use one for your training needs.Skip ahead: What is an employee coaching form? An employee coaching form is a detailed document used for planning and delivering coaching sessions within an organization. It outlines the goals of the coaching program, how you will accomplish them, and the methods of measuring participants' progress and success. A well-designed coaching form transforms your employees from passive to active learners. It sets their expectations early — so they know the objectives they're working towards and prepare ahead of time. At the end of the program, employees use the form to assess their performance, identify areas for improvement and provide feedback on the overall coaching process. Related: How To Implement Employee Training And DevelopmentImportance of using employee coaching forms At first, investing in employee coaching forms seems like an overkill. But a well-designed coaching form: An employee coaching form provides one consistent structure for your coaching sessions. Anyone tasked with coaching employees in the organization will rely on the document to guide them through the process — instead of designing a new plan from scratch. A standard coaching framework lets you deliver a consistent employee experience across different sessions. It shortens the learning curve for the employees too — as they will spend less time adapting to different coaching methods. An employee coaching form lets you document learner progress to see how they've improved and identify knowledge gaps. Let's say an employee signs up for a 4-week coaching program, and you record their performance each week using employee coaching forms. At the end of the program, you will use the notes recorded in the employee coaching forms to assess the employee's performance over the four weeks. Based on this information, you can recommend the next steps, and the employee's manager can draw up an objective development plan to address skill and knowledge gaps. Related: Employee training tracker templateGone are the days when coaching programs ran entirely at the trainer's discretion. Now, with an employee coaching form, everyone (employees and stakeholders) knows what to expect from a coaching program ahead of time — including content and timelines for each session and rubrics for assessments. By clearly articulating coaching objectives, processes, and timelines, the form ensures that the coach and the employee understand what needs to be achieved and how it will be done. This clarity sets the stage for accountability, leaving no room for ambiguity or misinterpretation.Employees will refer to the coaching form as the program progresses to see how well its execution aligns with the original plan. Say the coach indicated that they'd conduct formative assessments but use summative tests; the employee can ask why they've deviated from the guidelines. Or they can record their observations in the feedback section of the form.Related: ChatGPT prompts for employee training and development. Elements of an effective employee coaching form The specific elements of an employee coaching form vary depending on your organization's goals and coaching methodology. However, it typically includes the following information:This section should provide an overview of the coaching program and the basic information about the participant(s). Anyone who reads it should clearly understand what the program is about. Include details like: The name of the coaching program Employee's name and job title Coach's name and job title DepartmentDate of the coaching sessionSay you're organizing a communication coaching program for entry-level managers; your coaching form's information section might look like this: Program Title: Thinkific's Communication Skills Program for Entry-level Managers Date: September 1, 2023 Overview: This coaching program for entry-level managers aims to enhance communication skills essential for effective leadership. Participants will develop active listening, leadership communication, and conflict resolution skills. These skills will empower managers to engage their teams and promote a positive communication culture. Department: Marketing Employee: Faith U. [Entry-level manager] Coach: Daniela O. [Communications Team Lead] The goal is what you want to achieve with your coaching program. It should be employee-centric — tied to the skills the employee needs to thrive in their current role or reach the next level of their career. An actionable goal follows the SMART framework. This means it is: The goal concisely communicates one clear idea. The more specific the goal, the easier it becomes to create a plan of action.Consider these two examples: At the end of this program, participants will be able to manage team members, organize meetings and coordinate sales outreaches across the company. At the end of this program, participants will be able to plan and execute an end-to-end marketing campaign. Which of these examples is specific? The second one! It goes straight to the point and communicates a single idea. The goal is easy to track. In other words, there are quantifiable parameters for measuring your success. The easiest way to make your goal measurable is by attaching a timeframe. For example, your goal can be: Participants would have planned and executed at least one marketing campaign in three months. The goal is realistic and attainable. While it's important to set ambitious goals, they should align with what's possible — don't push your employees off a hill. As you set your goal, consider how much time and resources you have. For example, don't say, "Participants will launch five marketing campaigns in three weeks," when planning a single campaign takes about six weeks. The goal aligns with the employee's vision for their career and overlaps with your overall organizational objectives. For example, if the employee has no interest in becoming a manager, there's no reason for them to attend skill development training for soon-to-be managers.A relevant goal makes the coaching program mutually beneficial. The organization will be happy to invest its resources, and the employee will be excited to participate in the program. The goal has a specific timeframe or deadline. This creates a sense of urgency and provides a clear target for the coach and employees to work towards. It also prevents procrastination and allows for better planning and prioritization.Related: How training objectives help students reach their goals. Coaching session notes are where you document important observations from your discussions with the employee. You'll refer to these notes when it's time to assess the employee's progress at the end of the program and recommend the next steps. It's tempting to try to capture every detail of your coaching sessions. But this process is time-consuming and will distract you from your primary focus. Instead, break your coaching session into segments and record three to five key observations from each. In practice, you'll have something similar to this: Coaching Session Note: Marketing Strategy Coaching Program Session date: September 1, 2023 Coach: Daniela O. Coachee: Faith U. Segment 1: Current marketing assessment Observation 1: Faith relies on traditional advertising methods such as print media and billboards. This indicates a limited knowledge of the digital marketing landscape. Observation 2: Faith's marketing messaging centers on product features and specifications rather than customer benefits. Segment 2: Target market analysis Observation 1: Faith is yet to define her ideal customer profile (ICP). Observation 2: Faith has discovered a gap in the market that can help her gain market share for her product. Segment 3: Strategic planning and execution Observation 1: Faith needs to deepen her knowledge of key performance indicators (KPIs). Observation 2: Faith's budget allocation for marketing activities is imbalanced. She allocated most of the budget to traditional advertising, while digital marketing and other innovative strategies received limited investment. Next stepsConduct further market research to identify the ideal customer profile, understand their needs, and tailor marketing efforts accordingly.Create a detailed marketing plan with clear goals, objectives, and KPIs, ensuring a measurable approach to success.Allocate the marketing budget strategically to include a balanced mix of traditional and digital marketing channels.Tracking learner progress is how you measure the effectiveness of your employee coaching program. There are three major ways to do this: Conduct regular assessments Use formative or ongoing assessments to evaluate the employee in real time. For example, ask open-ended questions at the beginning of a coaching session to know how much knowledge the employee has about the subject matter. This helps you tailor your coaching content to address relevant knowledge gaps. At the end of each session, ask the employee to complete a simple feedback form to share what worked well and what needs improvement. These insights will help you deliver a better coaching experience in the future. Assign take-home projectsLearning should not end in the classroom. At the end of each coaching session, assign mini-projects to the employee. This will help them apply their knowledge to solving real-world context problems independently. Free printable employee coaching form template Creating a well-designed coaching form from scratch is time-consuming, so we've done the hard work for you. Our printable coaching form template lets you easily organize and manage employee coaching sessions. You can use the template as it is or tweak it to suit your organization's requirements. Four best practices for using employee coaching forms If misused, your coaching form will have little or no impact on your coaching process. Here are four things that will help you maximize the benefits of this document: Complete and share the employee coaching form with program participants and other stakeholders early. This way, they have enough time to familiarize themselves with the document and ask any questions. Ensure that your coaching process aligns with the guidelines in the form. If you need to make any adjustments, inform the participant(s) on time and let them know the reason for your decision. Use the coaching form as a communication tool between the employee and the coach to discuss goals, progress, and feedback.Use the coaching form as a tool for reflection and self-assessment. Encourage the employee to take ownership of their development. This means giving them a say in their goals and progress and holding them responsible for their success.Related: The Importance Of Training Your Employees: 25 ReasonsThree benefits of using technology for employee coaching forms As a small business with few employees, you might be able to manage employee coaching with paper forms. But as you scale and invest more time in employee training, physical forms become inadequate — they are expensive, difficult to manage, and prone to damage. At this point, it's time to switch to online forms. You'll enjoy benefits like: You can fill and access electronic forms online, making it convenient for coaches and employees to complete them at their own pace and from any location. Some documents also support offline access — meaning participants can fill them out even if they do not have access to the internet. Online form builders have analytics dashboards where you can view important data for your employee coaching form. For example, you'll see how many people have viewed and filled out the form and demographic information about form respondents — like gender and location. This makes it easier to follow up with employees. Say you discover that only half of the participants filled out your form; you can reach out to those who are yet to and help resolve any blockers. Online coaching forms automate the time-consuming aspects of your coaching process. For example, instead of asking employees to pick up and submit the form in person, you can share it with them via email or QR code. And when it's filled out, they will submit it remotely. You can also integrate the form into your learning management system to gather real-time feedback during coaching sessions. For example, PaperForm lets you embed online coaching forms into Thinkific for seamless data collection. Related: How Procurify saved time with online employee coaching. Elevate your employee coaching expertiseDownload the "Employee Coaching Template and Models" resource now and empower your team to reach new heights of performance. Employee coaching form template FAQs Find answers to common employee coaching questions. Yes, you can tweak the form to match your specific coaching requirements. Yes, it is. Coaches in all industries can tweak and use our coaching template. Yes. Thinkific's learning management system will help you onboard, train, and develop your workforce. You can integrate your employee coaching form into your Thinkific dashboard to manage your coaching process from a central hub. Plan to review and update your coaching forms at least once a quarter.Employee coaching forms can form part of your performance evaluation process. But you should not rely on them entirely to assess your employee's growth and performance. The Coaching Intake Form is a vital tool for gathering essential information about your clients before starting their coaching journey. This form helps you understand client backgrounds, personal goals, and any potential challenges, allowing you to create tailored coaching sessions that meet individual needs. A well-designed Intake Form ensures a structured process, enhancing the client-coach relationship and overall effectiveness of the program. This guide offers detailed examples and a step-by-step approach to building a perfect Client Intake Form for coaching. Download Coaching Intake Form Bundle A Coaching Intake Form is a document used by coaches to gather initial client information, such as personal details, goals, and challenges. It helps establish the coaching framework by identifying the client's current situation and desired outcomes. Coaches use the information to tailor their approach, ensuring that each session is aligned with the client's needs. It serves as the foundation for the coaching journey, offering insights into how to effectively guide the client toward success. Coaching Intake Format Full Name: _____ Age: _____ Contact Number: _____ Email: _____ What is your primary coaching goal? _____ Areas to Focus On: (Career/Personal/Health/Other): _____ Briefly describe your current situation: _____ What challenges are you facing? _____ What results do you expect from coaching? _____ Timeline for achieving these results: _____ Number of Sessions: _____ Frequency: _____ Session Duration: _____ Payment Terms: _____ Client Signature: _____ Date: _____ Coach Signature: _____ Download In PDFWordGoogle Docs A Career Coaching Intake Form gathers detailed information about a client's professional background, career goals, and challenges. This Event Planning Intake Form helps career coaches personalize their approach, ensuring the coaching sessions are aligned with individual career aspirations. Coaching Intake Form Template Download In PDFWordGoogle Docs A Coaching Intake Form Template provides a customizable format to collect key client information. It helps streamline the intake process for coaches, covering areas like personal goals, challenges, and desired outcomes, similar to a Massage Intake Form for therapists. Life Coaching Intake Form PDF Download In PDFWordGoogle Docs The Life Coaching Intake Form PDF offers a digital, fillable format to capture vital client data. It allows life coaches to assess a client's personal growth objectives, much like a Counseling Intake Form, fostering structured and personalized coaching experiences. Leadership Coaching Intake Form Download In PDFWordGoogle Docs The Leadership Coaching Intake Form focuses on gathering information about leadership challenges and development goals. It helps leadership coaches understand their client's strengths and weaknesses, similar to how a New Patient Intake Form supports health assessments, offering targeted coaching solutions. Browse More Coaching Intake Form Coaching Intake Form Sample impactforcoaches.org Details File Format Size: 85 KB Download Life Coach Intake Form in DOC truenaturewellness.com Details File Format Size: 12 KB Download Stress Coaching Intake Form stellarstrategist.com Details File Format Size: 482 KB Download Academic Success Coaching Intake Form southernct.edu Details File Format Size: 50 KB Download Career Coaching Intake Form schools.beyondb-school.com Details File Format Size: 176 KB Download Coach Strategy Intake Form brownpayneinnovations.com Details File Format Size: 170 KB Download Dietary Coaching Intake Form greenhealingnow.com Details File Format Size: 84 KB Download Fertility Coaching Intake Form thepointdenver.com Details File Format Size: 169 KB Download Financial Coaching Intake Form positiveselfcenter.com Details File Format Size: 102 KB Download Marriage Coaching Intake Form tc-counselingcoaching.com Details File Format Size: 104 KB Download Parent Coaching Intake Form dc4bhs.com Details File Format Size: 113 KB Download What are the four parts of a coaching session? To structure a session effectively, ensure it contains these parts. Opening: Establish focus and intention for the session. Exploration: Delve into challenges, like using a Family Intake Form for understanding deeper issues. Action Plan: Work on solutions and strategies. Wrap-up: Summarize the key takeaways and set the next steps. What should be on a coaching intake form? A coaching intake form must collect essential information about the client's goals, background, and challenges to personalize sessions. Client Information: Gather personal details such as name, contact, and relevant background information Goals: Ask about the client's short-term and long-term goals. Challenges: Understand obstacles the client faces. Expectations: Clarify what the client expects from coaching sessions. Previous Experience: Learn about any prior coaching or therapy experiences to avoid overlap with their Psychotherapy Intake Form. How to do a coaching intake session? An intake session establishes rapport and gathers necessary details for personalized coaching. Introduction: Start with an overview of your coaching process and how it aligns with the client's needs. Goal Identification: Focus on the client's desired outcomes. Assessment: Use questions from the Family Intake Form to identify personal challenges. Clarify Expectations: Confirm what the client hopes to achieve. Next Steps: Plan the coaching strategy based on the gathered data, akin to using a Counseling Intake Form. What are the 5 basic elements of a coaching session? A coaching session should contain these five key components for effectiveness and clarity. Goal Setting: Define clear, actionable goals with the client. Exploration: Help the client understand obstacles and opportunities. Strategy Development: Formulate a plan to achieve set goals. Action Plan: Break down the strategy into actionable steps. Review: End by reviewing the session, similar to checking insights from a Patient Intake Form. What are the 7 steps of coaching? The coaching process involves these crucial steps for maximum client benefit. Build Rapport: Establish a trusting relationship with the client. Set Goals: Use techniques from an Assessment Intake Form to define clear goals. Identify Obstacles: Explore the challenges hindering progress. Create Strategy: Develop a plan to overcome these obstacles. Implement Plan: Help the client take action on the strategy. Monitor Progress: Continuously assess the client's development. Provide Feedback: Offer constructive feedback to refine their actions What is the main focus of coaching? Coaching focuses on helping individuals achieve specific goals, enhance performance, and overcome challenges by providing structured guidance and support, similar to completing a Physical Therapy Intake Form for tailored plans. What is the main objective of coaching? The primary objective of coaching is to help clients reach their fullest potential through goal setting, self-reflection, and action, comparable to assessments in a Mental Health Provider Intake Form. What are the 3 C's of coaching? The 3 C's of coaching—Clarity, Commitment, and Consistency—guide the process. These principles ensure long-term success, much like the structured questions in a Chiropractic Intake Form. How do you structure a coaching session? A structured coaching session begins with goal-setting, exploration, strategy development, and ends with an action plan, akin to following a step-by-step Project Intake Form. How do you document a coaching session? Documenting a coaching session involves noting goals, strategies, progress, and future steps, similar to maintaining details in a Pediatric Intake Form for continuity. What is the purpose of the coaching form? The purpose of a coaching form is to gather essential client information, ensuring tailored sessions that meet individual goals, similar to a Medicine Patient Intake Form. How do I start a coaching plan? Start a coaching plan by identifying client goals, conducting assessments, and crafting strategies that guide the process, much like an initial Immigration Intake Form. What should coaching notes contain? Coaching notes should include session highlights, goals, progress, strategies, and next steps, resembling the format of a Care Provider Intake Form for comprehensive tracking. What is included in a coaching package? A coaching package typically includes intake sessions, personalized strategies, follow-ups, and ongoing support, similar to the offerings of a comprehensive Training Form. How do I create a coaching schedule? To create a coaching schedule, outline regular sessions with specific goals and action plans, similar to organizing an Training Feedback Form for structured guidance. In conclusion, a Coaching Intake Form plays an integral role in providing structured and personalized coaching services. Whether you're looking for a sample or creating your own form, this tool helps build a meaningful connection between coach and client. Use the provided Training Requisition Form templates to streamline your intake process and enhance your coaching sessions for greater success. Feedback is very necessary in order to improve. Schools, for instance, would randomly send feedback forms to classes to identify the teacher's effectivity in teaching the class. Companies also often give sample feedback forms to customers to see how satisfied they are with the products and services they are getting and what areas need to improve. Feedback forms effectively give a clear picture of how your customers think and how satisfied they are. We have sample feedback forms that you can use for any purpose. These Sample Forms are in Word format, so editing and printing them should not be a problem. Restaurant Feedback Form Template Details File Format MS Word Google Docs Pages Download HR Evaluation Feedback Form Template Details File Format MS Word Google Docs Pages PDF Download Sample Education Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Construction Company Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Personal Trainer Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word MS Publisher Download Apartment Rental Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Free Finance Consultant Feedback Form Template Details File Format Photoshop Google Docs InDesign MS Word Pages MS Publisher Download Sample Conference Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Taxi Services Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Free Handyman Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Nail Studio Shop Feedback Form Template Details File Format Photoshop Illustrator InDesign MS Word Pages MS Publisher Download Pub Feedback Form Template Details File Format Photoshop Illustrator InDesign MS Word MS Publisher Download Event Management Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word MS Publisher Download Security Guard Services Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Sample Startup Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word MS Publisher Download Speaker Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Business Consultant Feedback Form Template Details File Format Photoshop Illustrator InDesign MS Word MS Publisher Download Shipping Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Gym Feedback Form Template Details File Format Photoshop Illustrator InDesign MS Word MS Publisher Download Insurance Agency Feedback Form Template Details File Format Photoshop Google Docs Illustrator InDesign MS Word Pages MS Publisher Download Sample Training Feedback Form Template Details File Format Size: 55 KB Download Basic Student Feedback Form Template Details File Format Size: 67 KB Download Workshop Evaluation Feedback Form Template Details File Format Size: 99 KB Download Teacher Feedback Form Example Details File Format Size: 128 KB Download Client Feedback Report Form in Doc Details File Format Size: 73 KB Download Seminar Feedback Form Template Details File Format Size: 57 KB Download Who Can Use a Feedback Form? Feedback forms are used by many industries. They are very effective in making businesses and institutions see what goes on in the mind of the customers. Hence, when these institutions get feedback, they are able to serve their customers better. Restaurants and Food Businesses – Areas such as food quality, service, and ambiance are some of the things that need to be looked at in this kind of business. Hospitals – Hospitals give out Patient Feedback Forms to determine whether patients are satisfied with the staff, facilities, food, and the health services being offered. Schools – To determine whether students are satisfied with the facilities, course offerings, personnel, etc., are areas that schools look into in making these feedback forms. Schools also give out Student Feedback Forms to gain feedback on teachers' teaching style. Workshops/Training – To determine whether the objectives and goals of the training or workshop were met, feedback forms are sent out to the attendees. These are just some of the instances when feedback forms are put to great use. There are many other things where one would need feedback of as any products and services can be subjected to feedback from customers. Employee Evaluation Feedback Form Template Details File Format Size: 88 KB Download Faculty Feedback Form in Doc Details File Format Size: 192 KB Download Presentation Feedback Form Outline Details File Format Size: 66 KB Download Customer Service Feedback Form Template Details File Format Size: 70 KB Download Course Feedback Form in Word Details File Format Size: 91 KB Download Internal Feedback Form in Doc Details File Format Size: 70 KB Download Improving the Usability of Your Feedback Form A lot of companies are using feedback forms in order to better serve their customers. Most of them, however, do not get enough good feedback to really make the necessary changes. This problem could be attributed to how the feedback form is formatted. Here are some ways you can get more out of the forms you send your customers. Leave a lot of open space. Remember that you are giving customers work by giving you feedback. Make it less like a chore to them by leaving a lot of open spaces. A cluttered form looks time-consuming to your customers. Don't put compulsory fields. The customer should have a choice whether he or she only wants to answer only a few questions. Clearly label the fields. You don't want any confusion from the customers or else you will not get a substantial amount of feedback. Make sure the fields have labels that are easy to understand. Clearly label your rating scales. When using rating scales, make sure to clearly label which one is the worst and which is the best. This is often a source of confusion for many customers. Feedback forms such as Service Feedback Forms need to be simple enough for your customers to fill. Our feedback forms are in a Word document so printing and editing them is easy. In coaching, first impressions are everything. These initial encounters set the stage for the ongoing relationship between coach and client. Imagine this scenario: Julianna logs into the first video call session exactly on time, but her coach has not shown up yet. Finally, six minutes late, her wellness coach Horatio enters the call, breathing heavily and reaching for a glass of water. After gulping down a huge chug and making a goofy joke about hydrating, he apologizes for being late and initiates the conversation. He halfheartedly asks a few banal questions like "How are you?" and "How did you find my services?" as he shuffles papers on his desk and looks away from the camera to dig for digital files. After Julianna awkwardly responds to a few of these queries, Horatio seems to find his stride and launches into a hard-hitting, inquisition-style interview that makes Julianna feel a bit defensive about her past mistakes and current state of life. She white-knuckles her way through the first session, but never follows up to make the second appointment. She feels zero connection to Horatio and distrusts that he has the answer to her problems. Horatio, meanwhile, complains to his group of coaching peers that "Clients just don't want to commit to the process!" In this imagined coaching scenario, there's one easy-to-implement tool Horatio could have integrated into his onboarding process to make Julianna's first session much more comfortable and himself far more prepared — the coaching intake form. Coaching intake forms provide structure to your first encounters with new clients and offer direction for the path forward. Keep reading or jump right to the freebies by getting access to the free Coach Factory intake form templates. These seven niche-specific templates can be used as-is or help you create your own intake forms. A thoughtfully drafted intake form is the first step in collaborative coaching. It helps you understand your client's needs and aspirations while setting the foundation for a trust-filled relationship. This collection of intake form templates has variations for seven coaching niches: health and wellness, academic, business, career, executive, and financial. Download for Free Download every Coach Factory resource for FREE! Firstly, a thoughtfully drafted intake form streamlines the onboarding process. Instead of taking numerous sessions to gather basic information, intake forms help coaches identify needs from the very beginning, especially if they are given to clients to submit before the first session. Clients can work through the questions on their own without being on the spot in real time, forced to come up with a clever answer. They can mull over their responses and decide how much private information to disclose. Even if intake forms are done in real time on the first client call, they are more efficient than a free flowing conversation. And as long as you take good notes, an intake form provides a reliable reference of facts about your client. Secondly, intake forms are instrumental in setting expectations and boundaries. They give clients a hint of the upcoming journey, the methodologies used, and the limits of the coach-client relationship. This clarity can prevent potential misunderstandings. Next, a comprehensive and well-organized intake form shows professionalism. Meticulous attention to detail establishes trust — the bedrock of any beneficial coaching engagement. Lastly, from your perspective, an intake form, used with all of your clients during the onboarding process, will standardize your process, giving you the same basic background on each client. You will show up to that first call fully prepared to either go over the client's answers or work through the form in real time as you take detailed notes. In other words, you won't show up like Horatio did. Intake forms are more than administrative red tape; they are strategic instruments that shape the trajectory of the coaching experience. Although general coaching intake forms are available, the most effective ones will reflect your particular niche. Here are example intake questions from seven fields that you can further hone for your specialty or coaching style. Get many more questions by downloading the Coach Factory intake form template collection — totally free when you sign up as a VIP member. Life coaching is about helping individuals realize their potential and navigate life transitions. The intake form should address the client's personal vision, personal development goals, and key life transitions or changes. Key Questions When you imagine your ideal life five years from now, what does it look like and how do you feel? What specific areas of personal growth or self-improvement do you want to focus on during our coaching sessions? How do you usually cope with or navigate significant changes in your life? Health and wellness coaching focuses on promoting overall well-being and helping clients make informed health choices. This form focuses on health goals, medical history, and lifestyle habits. Key Questions What are the top three health goals you'd like to achieve in the next six months to a year? Are you currently taking any medications or supplements? If so, please list them. How would you describe your current dietary habits? Are there any specific dietary patterns or restrictions you follow? This coaching niche aims to improve students' academic performance and develop skills necessary for academic success. The academic coaching form should include space to discuss academic aspirations and long-term goals, current study habits and challenges, and preferred learning styles. Key Questions What are your primary academic goals for this year? Are there particular universities or courses where you're seeking admission? Describe your typical study routine. How many hours do you study each day, and do you have any set routines or patterns? Which learning format do you find most effective: listening (auditory), seeing (visual), or doing (kinesthetic/tactile)? Business coaches work with entrepreneurs and businesses to enhance performance and achieve goals. A good business intake form will highlight business objectives and vision, current business challenges, team dynamics, and leadership style. Key Questions Where do you envision your business in the next 3-5 years? What are the key milestones you hope to achieve along the way? What are the most pressing challenges your business currently faces? How would you describe the current dynamics within your team? Are there any evident strengths or weaknesses? Career coaching helps professionals navigate the complexities of their work roles. The intake form should include insights on career aspirations, current job role and responsibilities, and areas for development. Key Questions Where do you envision yourself professionally in the next 3-5 years? Can you describe your current job role, including your primary responsibilities and tasks? List down the skills you believe are your strongest assets in your current role or career path. Targeted at top-level managers and leaders, this type of coaching aims to refine leadership skills and drive organizational success. The executive coaching intake form covers leadership vision and challenges, peer feedback, and leadership style. Key Questions How do you envision your ideal leadership style, and what impact would you like to have on your organization in the next 2-5 years? Have you recently received feedback from your peers, team members, or other stakeholders? If so, what were the main takeaways? How would you describe your current leadership style (e.g., democratic, autocratic, transformational, etc.)? This coaching niche aids individuals in managing their finances, making informed financial decisions, and achieving financial goals. Most financial coaching intake forms include information on a client's current financial situation, financial behaviors, and challenges in managing their finances. Key Questions What are your primary financial goals for the next 1-5 years? Are there milestones such as purchasing a home, traveling, or funding a child's education that you're aiming for? Can you provide a rough breakdown of your monthly income, expenses, and any recurring financial obligations? How would you describe your spending habits? Do you consider yourself an impulsive spender, a saver, or somewhere in between? How and when you administer the intake form influences the trajectory of the coaching relationship. Submitting the intake form before the actual coaching session offers several advantages. Firstly, it allows coaches to prepare for their sessions adequately by reviewing the answers and brainstorming further lines of conversation. On the client's side, having this window provides them an opportunity for introspection. By contemplating and responding to the questions beforehand, they can arrive at the session with a clearer understanding of their objectives and a readiness to engage in meaningful dialogue. If you choose to have your clients orally answer your intake form questions in real-time during the session, you get the chance for an immediate deep dive into coaching topics. Right off the bat, you can offer clarity on doubts, probe further, or answer questions. This method promotes active participation and demonstrates the coach's commitment to understanding the client's perspective. You may want to ask your client their own preferences. Do they prefer to fill it out in writing beforehand or discuss it in real time? For clients who are more talkers than writers but would still like to work on the intake before the first session, they could submit audio or video answers which you can then have transcribed into text form for easy reference. Regardless of when and in what format you administer it, the effectiveness of an intake form largely hinges on its design and use. Here are some best practices to consider. 1. Adaptability Coaching tools and techniques evolve with time. It's essential to periodically review and update your intake forms, ensuring they remain relevant and aligned with your current coaching practices. 2. Clarity The wording should be straightforward. Avoid industry jargon that may confuse clients. The goal is to create a form that anyone can easily comprehend and respond to, regardless of their familiarity with coaching. 3. Tech Integration Online, digital forms are convenient for clients and can integrate with databases, allowing coaches to store and analyze data efficiently. Of course, it's important to use platforms that prioritize data security to safeguard client information. 4. Respect and Discretion Intake forms sometimes touch on personal or sensitive topics. Coaches should always handle this information with the utmost respect to ensure confidentiality and client safety. Give clients the choice to opt out of a specific question if it's too emotionally painful. More than just mindless paperwork, life coaching intake forms serve as a tool to help shape the coaching journey. They signal to your clients your coaching professionalism, your attention to detail, and your sincere commitment to understanding their needs and aspirations. There's no need to start from scratch with your intake form, though. Leverage these pre-made coaching intake form templates — free for any Coach Factory VIP member. Use them as-is, or modify them with your own business name, branding, and specialized wording. A thoughtfully drafted intake form is the first step in collaborative coaching. It helps you understand your client's needs and aspirations while setting the foundation for a trust-filled relationship. This collection of intake form templates has variations for seven coaching niches: health and wellness, academic, business, career, executive, and financial. Download for Free Download every Coach Factory resource for FREE! A Coaching Form is a tool used in the coaching process to facilitate communication and goal-setting between a coach and their clients. It serves as a framework for organizing and documenting essential information, progress, and insights throughout the coaching relationship. These forms can take various formats, from physical paper documents to digital templates integrated into coaching software platforms.The form ensures clarity and alignment between the coach and client regarding objectives and strategies. It includes personal details, current challenges, and desired outcomes to guide conversations effectively during coaching sessions. Coaches use the form to monitor progress, offer relevant feedback, and update goals as needed. Additionally, it helps evaluate coaching effectiveness by tracking milestones and assessing the impact of the coaching process.Click here to view on YouTubeThe Coaching Form template is a simple way to streamline your coaching sessions. This section will guide you through filling out the form, ensuring you capture essential details for successful coaching sessions.Step 1: Download the templateFirst, download the Coaching Form template. This form is designed to be user-friendly and customizable to your coaching business, whether focusing on life coaching or an employee's development.Step 2: Complete client informationBegin by entering the client's name, the coaching session date, and the session number. This ensures you have a clear record of when the session took place and the number of times the client has attended. Step 3: Define the session focusNext, identify the main goal or objective for the session and the challenges the client is currently facing. This is the heart of the coaching feedback form, allowing you to set clear intentions and track progress over time.Step 4: Record key insights and reflectionsNote any insights or reflections from the client during the coaching session. This section is practical because it captures how the client processes the discussion. The coach should also provide feedback here to encourage growth.Step 5: Establish an action planFinally, work with the client to create a concrete action plan with specific steps and timelines. This is critical for effective coaching sessions, ensuring accountability and forward movement. Include details about how the client will stay accountable and how you, as the coach, will support them.Coaching Forms offer practical benefits in various coaching scenarios for practitioners and clients alike. The following are instances where Coaching Forms play a crucial role:Initial consultation and onboardingThese forms streamline the intake process during the early stages of a coaching relationship. Coaches can gather essential client information, including personal details, background, and coaching objectives. Understanding client needs from the outset enables coaches to effectively tailor their approach and build rapport. Goal setting and planningCoaching Forms are instrumental in facilitating the goal-setting process. They enable coaches and clients to collaborate in defining clear, measurable, and attainable goals. By documenting these goals, coaching Forms set the way for the coaching journey, ensuring focus and progress.Progress tracking and accountabilityThey are used throughout the coaching engagement to monitor progress and track achievements. Coaches can use the documented information to assess the effectiveness of their strategies and adjust them accordingly. Identification of challenges and areas of growthCoaching Forms allow clients to articulate their challenges, concerns, and areas of improvement. This information provides coaches with useful insights. By focusing on the identified growth areas, clients can experience tangible and meaningful development.Evaluation and feedbackAs the coaching relationship nears its conclusion, Coaching Forms become vital for evaluation and feedback. Both coaches and clients can reflect on the progress made, lessons learned, and the overall impact of the coaching process. Input gathered through Coaching Forms facilitates continuous improvement for coaches and ensures client satisfaction.Using a Coaching Form offers several key advantages that enhance both the coaching process and client outcomes. Here are three of them:Promotes efficient information gatheringFree Coaching Forms streamline gathering crucial client information during the initial consultation and onboarding phase. Coaches can collect comprehensive data, including personal details, background, and specific coaching objectives, allowing a more in-depth understanding of the client's needs and aspirations.Saves timeCoaching Forms help save time by consolidating relevant client data and minimizing repetitive questioning during sessions. This allows coaches to dedicate more time to productive discussions and tailored strategies.Facilitates a tailored coaching approachWith insights into clients' challenges, preferences, and growth areas, a coaching template offers a more personalized approach. Coaches can use this information to customize their methods and deliver a more impactful coaching experience.Coaches and practitioners in various coaching disciplines, including life coaches, career coaches, executive coaches, business coaches, and health and wellness coaches, utilize Coaching Forms.Yes, many Coaching Forms are customizable, allowing coaches to tailor the content and format to align with their clients' coaching approach and unique needs. Yes, with digital apps or software like Carepatron, clients can conveniently access and complete forms securely online, providing a paperless and efficient experience for both clients and coaches. As a solution-focused process, Pavese said goal-setting is an incredibly important part of coaching. During the goal development phase, a coachee and coach decide on milestones, exercises and micro-learnings. The goal-setting process will vary by coach, but most goals are derived from the gaps or blindspots illuminated by initial assessments. During a time of organizational turbulence amid COVID-19, Japan Tobacco International (JTI) worked with CoachHub to support its workforce. Recent data shows that 89% of coachees reported that the coaching helped them achieve their goals. Goal-setting exercises are an essential piece of the digital coaching process. Goals may include specific objectives like increasing employee engagement, setting performance targets like strengthening conflict management skills or talent development objectives like empowering first-time managers. Each individual goal is then typically defined using a structure like the SMART framework which is used to create specific, measurable, achievable, relevant, and time-bound goals. 4. Thoughtful journaling exercises Journaling is a versatile exercise used across contexts and coaching relationships. Coaches may recommend open-ended journaling or teach specific journaling frameworks like the Conflict Coaching Road Map for Journaling, a framework that helps professionals become aware of their conflict style and better manage conflict. SHRM reports that journaling can be used to "…gain awareness of emotions and behaviors and to track progress toward goals." If a coachee doesn't know where to begin with journaling, a coach may offer prompts. Organizational Behavior Professor, Nancy Adler, recommends journaling in response to questions like, "How am I feeling right now?" and "What deserves my highest-quality attention in my leadership, my life, and the world?" Pavese said another common type of journaling is future self journaling. Future self journaling asks a coachee to envision and describe their future—detailing what it feels and looks like. "As they create that vision of their future self," shared Pavese, "…it can help them along their journey by figuring out how to better align their goals to get in more alignment with their future self?" 5. Identifying core values and principles Values exercises are popular in digital coaching because, as Pavese said, "Clearly defined core values provide a really strong and important starting point for understanding what's important to you. A coachee's core values often serve as an important compass—helping coachees make decisions and take aligned action." Research also shows that values alignment can drive employee engagement. Coaches will often assign microtasks to help coachees define their core values and increase their sense of purpose. Common exercises involve ranking values from a list, completing a values card activity, or creating a life-wheel. This is an important step because when a coachee defines their values they can more easily maximize the work that gives them a sense of purpose (and minimize tasks that do not align with their values). In fact, 91% of CoachHub coachees increased their sense of purpose after digital coaching. 6. Gratitude coaching exercises Gratitude practices are a common exercise used in digital coaching because, according to Harvard Health, "…most of the studies published on [gratitude] support an association between gratitude and an individual's well-being." Pavese shared that, "If a coachee is looking to develop a more open and optimistic mindset, a gratitude practice can help expand their optimism muscle." One of the most popular gratitude exercises used by coaches is Three Good Things, a practice created by American Psychologist, Martin Seligman. This exercise asks coachees to write down three things that went well each day and their causes. Researchers found that the Three Good Things exercise led to an increase in happiness and decreased depressive symptoms for six months. 7. Developing and rehearsing communication skills Communication is key, especially amid uncertainty (as illustrated throughout the pandemic). In fact, CoachHub research shows that communication is the most frequently used soft skill by middle- and senior-level managers. As a result, many digital coaches focus on helping coachees develop and practice their communication skills using frameworks like nonviolent communication and active listening. For example, to help a coachee develop their active listening skills, they may role-play with their coach by reflecting the emotions of the speaker back to them. This could sound like, "If I understand you correctly, you are feeling frustrated because your manager told you one thing and your colleague told you something different. Is that accurate?" 8. Cultivating emotional regulation and resilience Resilience, or the ability to cope with a difficult or stressful situation, is one of the top professional development goals of coachees. Fortunately, coachees can build resilience and learn emotional regulation, a skill closely tied to resilience. CoachHub data shows that 85% of managers who have received coaching from CoachHub outperform their peers in soft skills such as agility and resilience. To help coachees build emotional resilience, coaches use a variety of different exercises. Common microtasks include having coachees name their emotions (i.e. say how they feel), practice mindfulness techniques, and take detachment breaks. 9. Coaching exercises that celebrate wins and accomplishments Coaching can provide space and time for professionals to slow down, recognize their accomplishments, and celebrate—something a lot of folks struggle to do. Celebrating means giving yourself permission to stop and enjoy what you already achieved. To help a coachee celebrate their accomplishments during a session, a coach may ask something like, "How will you celebrate the achievement of this goal?" Depending on the professional,