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**Create the Life You Deserve!**

FIRST NAME:                     AGE:

MARITAL STATUS:         CURRENT PROFESSION:

 *Do you want to change professions?   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

 *Why are you interested in coaching?*  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CATEGORIES OF IMPROVEMENT

Rate yourself on a scale of 1-10 in each of the following areas.  1 being, that you have not made any progress in this area and 10 that you are where you think you should be by this stage in your life?

Next to each write what specifically do you want help with in these categories.

|  |  |  |
| --- | --- | --- |
| **Description** | **Rank** | **Why did you choose that #?** |
| Career |  |  |
| Finance |  |  |
| Health |  |  |
| Emotions |  |  |
| Relationships |  |  |
| Time Management |  |  |
|  |  |  |

*Are you looking to increase income?*

*If so what’s your average monthly income/revenue?*

*What would you like to increase it to?*

Pick 3 of the above categories that you want to change and or improve.  Ask yourself, what would have to happen in order to take each of these 3 areas to a level “10” experience?

1.

2.

3.

*What is the* ***PAY OFF*** *for achieving these goals?  How is your new life going to be different?  What is the upside or the reward for following through on these goals?*

*What* ***beliefs****,* ***fears & or patterns of behavior*** *have prevented you from already achieving these goals?*

*What is the* ***COST or the Negative Consequences*** *for not following through?  What is your life going to be like if you continue to buy into your excuses, patterns and fears?*

*Why are you a good candidate for our coaching and how do you think you will be able to benefit from a coaching program like this?*

**Career:**

On a scale of 1-10 how would you rate your current career? \_\_\_\_

*What don’t you like about it?*

*What DO you like about it?*

*What characteristics in a job are most important to you? (Underline as many as you like)*

Security, Freedom,   Flexible Hours   Consistent hours, Consistent Routine Team Oriented, Healthy Competition, Pay, Benefits, Commute, Being able to work from Home,  Stability, Variety, Ability to Share Ideas With Decision Makers, Ability to tie pay to Results (with Bonuses or Commission), Regular Paycheck.

*Are there certain types of people you hate working with?  If so give an example:*

*Are there certain types of people you LOVE working with?  If so give an example:*

*If you could wave a magic wand and give yourself any job what would it be and why?*

*Is there anything else you feel I should know?  If so please share:*

**What are your business/life goals for the next 60 days?**

Think of it this way, if you could wave a magic wand and make your business and life exactly as you’d like it 60 days from now what would it be like?  Remember we can only go so far in 90 days so think about what position you’d like to be in that you feel would put you solidly on track to accomplish your longer term goals.

* *What parts of your business would be more organized and systemized?*
* *What type of lead systems would you be employing and how many new leads per week would you be getting?*
* *What would you be on track to earn per month?*
* *How much more free time would you have than you have right now?*
* *In your free time what would be most important to you to focus on?*

**Family, vacation, health**

*(Underline as many as apply and feel free to add others)*

My primary romantic relationship (spouse, partner etc.), My children, My social circle and social life, Health (getting in better shape, weight loss, meditation etc.), Using the free time as downtime to Relax and Create Balance, New or additional business ventures, Traveling.

Other(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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*Is there a place mentally or emotionally that you would like to advance to or a part of your mental/emotional life that you would like to make even better (for example more confidence, higher self-esteem, generally happier, reduced stress, more positive and grateful)?*

*Are there any other business or life areas not mentioned here you’d like to focus on?*

**Business Success Checklist**

***Please underline the ones that ARE true for you***

1. *Do you have a clear, written set of goals for your business?*
2. *Do you have a timeline and a written plan for achieving those goals?*
3. *Are you clear on the top 5 key money making activities for your business?*
4. *Do you have automated systems or marketing processes that bring you leads while you sleep?*
5. *Have you gone through your business and automated, eliminated or outsourced any small tasks that are keeping you from more important ones?*
6. *Have you created SOPs (Standard operating procedures) so you don’t have to explain tasks to new hires/assistants?*
7. *Do you have an assistant or at least an inexpensive VIRTUAL assistant (someone who works from another country for $3-$7 an hour) to hand off small tasks to?*
8. *Do you have scripts in place for sales, referrals, appointment setting etc...*
9. *Are you able to step away from your business and still have it making money?*
10. *Are you crystal clear on who your Ideal Client is?  (Hint: “Everyone” means “No One”)*
11. *Do you have a clear USP (Unique Selling Proposition) that sets you apart from your competition?  (Hint:  General Terms like “Great customer service” are not USPs because anyone can say them)*
12. *Do you have your contacts and leads organized into a database where you can easily sort and access them?*

**Life:**

1. *Are you getting regular sleep and enough sleep? (7.5 - 8 hrs at least 5 days a week)*
2. *Would you classify your health as very good and your energy level as high?*
3. *Are you regularly scheduling and getting committed, focused time with people you care about (friends/family/loved ones) and creating moments that fulfill you emotionally?*
4. *Are you regularly scheduling and getting committed personal time to yourself?*
5. *During your personal time are you able to relax and refresh mentally and emotionally or are you still thinking about work?*

**Background Narrative –** *Please tell me anything about yourself you consider relevant*