



**LebenWell**

Behavioral Health Coaching, LLC

**Free Consultation Questionnaire (preliminary intake and coaching disclosure)**

Welcome to LebenWell Coaching! This form serves as a preliminary coaching suitability screening and will help to focus our time effectively during your free consultation. Please fill out this form, respond to as many questions as you can (preferably all; N/A, for ones that do not apply), and submit along with your emailed consultation request. After the form is reviewed, you will be contacted to schedule the free initial consultation.

During the free consultation, we will briefly get to know one another and discuss 1) your current situation [“where you are”] and your main goal [“where you want to be”] that prompted you to seek coaching and how you think a successful outcome would benefit you/make you feel, 2) what’s worked well and not so well to move you forward thus far, 3) what ancillary and directional outcomes you hope to achieve through coaching and what difference you foresee them making, 4) questions about any item this form, 5) your preferences for how you wish to be [and not be] coached, some of the ways I [your coach] coach for optimal outcomes, and how we can best collaborate to move you forward with success.

Clients are often amazed by the value they receive just in completing this form, so take your time! Feel free to let it sit for a day or two and come back to it. Some areas require to you fill in the blank, others require a sentence or two, and most require just a confirmatory check mark of understanding.

**Part 1**

Coaching Services sought: Life \_\_\_\_\_ Health/Wellness \_\_\_\_\_ Career \_\_\_\_\_

You are seeking (check): Onsite coaching \_\_\_\_\_ Tele-coaching \_\_\_\_\_ Both \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Age: \_\_\_\_\_

Address: \_\_\_\_\_ Referral Source \_\_\_\_\_

Occupation/Job Title \_\_\_\_\_ Organization Name \_\_\_\_\_

Email (1): \_\_\_\_\_ Email (2): \_\_\_\_\_

VSee/Skype handle: \_\_\_\_\_

Telephone (1): \_\_\_\_\_ Telephone (2): \_\_\_\_\_

Current and past psychiatric diagnoses: Current \_\_\_\_\_

Past \_\_\_\_\_



**Part 2**

If you have been coached before, successfully or unsuccessfully, please describe \_\_\_\_\_

\_\_\_\_\_

The main reason you are seeking coaching is: \_\_\_\_\_

\_\_\_\_\_

In a single sentence relative to the main reason you are seeking coaching, describe “where you are”, followed by a single sentence that describes “where you want to be” \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

In a single sentence, describe what you believe is keeping you from being where you want to be, followed by a single sentence that describes the best way you currently envision getting there \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How long has your main reason for seeking coaching been a concern for you, and what makes it important to seek coaching support now? \_\_\_\_\_

\_\_\_\_\_

Relative to your main goal, what have to tried? What has worked on any level? \_\_\_\_\_

\_\_\_\_\_

What you most want/need from my coach is: \_\_\_\_\_

\_\_\_\_\_

You will know coaching is/has been successful, specifically and measurably, when \_\_\_\_\_

\_\_\_\_\_



How ready and willing are you to work on important ancillary and directional goals coaching inevitably involves [involving personal change, transformation, skills, and capacities in how you “are” and relate to yourself and your main goal; see Part 3 of this form for outcome examples]?

---

The way (method, style e.g. gentle, aggressive, directive, consultative, nondirective) you prefer to be coached is:

---

What you really want/need my coach to know about me from the start is: \_\_\_\_\_

---

What usually works and does not work for you to make a change is: \_\_\_\_\_

---

What you know you do not want in/from coaching is: \_\_\_\_\_

Assuming your coaching has been successful and you are looking back at how you achieved your outcome and directional goals a year from now, what important actions would you have needed to commit to and take, and what would have needed to happen in/through the PROCESS of your coaching to get those satisfying results?

---

---

What other areas of your life [e.g. community, financial, social, spiritual, health/wellness, career] might also benefit from an upgrade or greater fulfilment, and how does your main goal impact these areas?

---

---

If you already have a guiding personal vision/mission statement, please write it here \_\_\_\_\_

---

What, if it were present (inner resourcefulness or outer resources), would most help you along? \_\_\_\_\_

---



**Part 3 – Outcome preferences for ancillary (or main) directional goals [check all that apply]:**

- Increased awareness (clarity, self-knowledge, Big Picture, perspective, mindfulness, facts, etc.)
- increased life satisfaction ( \_\_financial, \_\_social, \_\_personal, \_\_career, \_\_wellness, \_\_spiritual)
- increased ability/capacity in some area (the “I’ve got this” feeling / feeling resourced)
- increased inner resourcefulness and capacity to draw upon and leverage external resources
- increased performance in some area \_\_\_\_\_
- increased positive emotions, joy, and pleasure
- increased ability to self-manage, self-discipline, and to create and sustain positive habits/rituals
- increased daily intentional behavior and ability to respond vs react (to the internal and external)
- increased facility with foresight, planning, goal setting, strategy, tactical flexibility, and execution
- increased decisiveness
- increased ability to reframe and interpret events, circumstances, and states constructively
- increased peace with the past and a mindful acceptance of the truth of what is
- increased facility with connecting the dots of your life and accepting all of who you are
- increased energy and management of self-care fundamentals (e.g. stress, sleep, diet, fitness)
- increased ability to empathize, accept, hold things in perspective, and see the bigger picture
- increased ability to organize, strategize, and tactical skills
- increased ability to pursue what matters, to let go what doesn’t, to prioritize, and to accept things
- increased sense of flow
- increased satisfaction with the quality and type of relationships (including to yourself)
- increased ability and/or interest to learn, grow, and benefit from feedback and experience
- increased ability to self-coach, create effective inner talk and inquiry, and manage your state



- \_\_\_\_\_ increased ability to simply be, let go of distractions, and focus on what matters
- \_\_\_\_\_ increased general faith, trust, and confidence in life, others, self, and a higher order of things
- \_\_\_\_\_ increased sense of certain virtues, such as \_\_\_\_\_
- \_\_\_\_\_ increased ability to leverage strengths, talents, values, brand/reputation, skills, and capacities
- \_\_\_\_\_ increased sense/ability to articulate personal mission and purpose, who I want to be and why
- \_\_\_\_\_ increased comfort with ambiguity, change, and transition
- \_\_\_\_\_ increased [YOU FILL IN] \_\_\_\_\_
- \_\_\_\_\_ increased [YOU FILL IN] \_\_\_\_\_

Which "top 7" of the above ancillary/main coaching success outcomes from the above list are the most important to you, and why?

---

---

Which one or two might be the "pre-condition" goals that can most positively leverage all the rest? \_\_\_\_\_

---

What are one or two steps you think you can take immediately to move forward on these? \_\_\_\_\_

---

What are the top 3 ways you would like to be held accountable to the actions required of you in coaching (e.g. taking the time to complete this form to receive the free consultation is an example)?

---

**Part 4 - Check to confirm understanding (place your check mark in the space to the right to confirm)**

You are aware of the differences between Coaching and Counseling/Psychotherapy \_\_\_\_\_



You are aware that Coaching is not and does not take the place of appropriate mental health treatment, that you are responsible for seeking appropriate mental health treatment (if needed), and that coaching may be terminated or, in some cases, collaboratively pursued with your provider when mental health treatment is advised [coaching may also be terminated for nondisclosure of mental health treatments]: \_\_\_\_\_

Prior to your free consultation, you are advised to visit the LebenWell Behavioral Health Coaching, LLC website ([www.lebenwell.com](http://www.lebenwell.com)) to familiarize yourself with the pertinent service pages, the coaching session booking page, the FAQ page, and, especially, the links/resources page. You have done this: \_\_\_\_\_

You consider yourself to be ready, willing, and able to actively participate, learn, and take action on your behalf ("actions" may include mental/cognitive planning, reflection, and meditations) through coaching: \_\_\_\_\_

You understand that the goal you enter coaching with may have one or more (typical) ancillary or "pre-condition" goals that you may also need to work on, and you understand that sometimes goals can emerge through coaching that supersede, by-pass, or relativize your original goal(s): \_\_\_\_\_

Which describes you better (check):

You know your destination and just need work on the journey/optimal ways to reach the target \_\_\_\_\_

You let the journey determine the destinations and just need to work on optimizing the traveler \_\_\_\_\_

You understand that final coaching goals will be agreed on collaboratively, may be modified along the way, and that your candid and forthright honesty about the coaching process are essential: \_\_\_\_\_

You are aware there are no "guaranteed outcomes" from coaching: \_\_\_\_\_

You are aware that assessments and measurement (e.g. personality, values, strengths, quality of life, career satisfaction, well-being, mindfulness, health status, scaled performance, etc.) are, more often than not, considered essential for optimal coaching (you cannot manage what you cannot measure): \_\_\_\_\_

You understand that online tele-coaching will require VSee, Skype, or similar online tele-conferencing equipment and/or your willingness and capacity to telephone your coach at your expense: \_\_\_\_\_

You understand that coaching sessions must be booked and paid for in advance through LebenWell.com (or alternatively arranged e.g. Wave payments) online: \_\_\_\_\_

You are aware of the single or package sessions available and the cost of each (via LebenWell.com): \_\_\_\_\_



You are aware that you will be filling out a formal Coaching Agreement prior to your first coaching (available on the LebenWell website), and that the present form will enter your coachee file upon the start of coaching: \_\_\_\_\_

You agree to disclose any circumstances upon you that affect your decision/ability to undertake coaching, and you are aware of your responsibility to disclose your preferences and feedback: \_\_\_\_\_

You understand that that your coach is trained in a number of approaches that may be integrated and tailored to your benefit, including - Auerbach GOOD model, Motivational Interviewing, Positive Psychology, EVB Behavioral Health, Solution Focused, Watai, Integral, and CoActive. You are also aware that your coach abides by a strict code of ethics:  
[<http://www.cce-global.org/Assets/Ethics/BCCcodeofethics.pdf>] \_\_\_\_\_

You understand that all coaching interactions are entirely confidential (see FAQ page on LebenWell.com) unless sharing/collaboration agreements or contracts (e.g. EAP, employer, empaneled provider group) are made, legal circumstances require record sharing, or if there is a clear and present/imminent danger to yourself or others that may compel your coach to “warn/protect” record disclosures: \_\_\_\_\_

[Recommended] – Additional things you want your coach to know prior to your free consultation (e.g. what are a few things you are really grateful for in your life; what enlivens you and puts you in flow; what are a few things you are most proud of; what are you really good at; what are a few adjectives to describe you—and what are a few adjectives you would like to add to that???)

---

---

---

Thank you for taking the time to fill out this form! Take some time to reflect on how you have responded and revise any items prior to submitting. If you are new to coaching, you now have your first taste of how much of your own time, energy, and attention you will be called upon to commit to yourself and your desired future!

I look forward to being present to you and your success every step of the way!