



Intake Session Preparation Form

The intake session is the first session with your coach and is used to set the stage for your subsequent coaching experience. The intake session is longer than regular sessions in order to cover more topics and answer your questions about coaching. Unlike subsequent meetings where you set the agenda, the coach sets the agenda for the intake session.

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What Will Be Covered

Your Mind Map

- Your contact information
- Pertinent family information
- Pertinent work/career information
- Other pertinent information

The Coaching Agreement

The Inventory

What Are Your Values?

- What is important to you?
- Peak experiences: when has your life been full, rich, and exciting?
- What drives you crazy or makes you frustrated?
- What is so much a part of you that you haven't even thought to list it?

Your Primary Focus

- Identify the areas that you want to hold as your main focus for the next three-month coaching period.
- For each area, provide a simple heading and a description of the measurable result; that is, your evidence that a goal has been reached or milestones along the way to reaching a goal.