



CLIENT INTAKE FOR ORGANIZATIONS

Disclaimer: Thank you for your interest in being a client of High Country Coaching. Information collected about new clients is confidential and will be treated accordingly.

CLIENT INFORMATION

Contacts Name: _____ **Organization Name:** _____

Denominational Affiliation (if any): _____

Address: _____

E-Mail: _____ **Phone:** _____

Position Within the Organization: _____

How did you hear about us? _____

Do you have clearance/ approval from you organization to discuss any of these matter with us?

Yes: No:

Online (Zoom) Session: **In-person (travel) Session Requested**

SELF-ASSESSMENT

Select the appropriate checkbox to indicate your agreement with each of the following statements:

The organization I am in functions well.

Disagree Somewhat Agree Agree Strongly Agree

I am satisfied with my organization's decision-making mechanisms.

Disagree Somewhat Agree Agree Strongly Agree

The organization work efficiently.

Disagree Somewhat Agree Agree Strongly Agree

The organization is financially secure.

Disagree Somewhat Agree Agree Strongly Agree

The organization has a good image in the community.

Disagree Somewhat Agree Agree Strongly Agree

The organization's leadership works harmoniously.

Disagree Somewhat Agree Agree Strongly Agree

Th organization feels good about the direction it is going.

Disagree Somewhat Agree Agree Strongly Agree

SELF-DESCRIPTION OF ORGANIZATION & ISSUES

NOTE: In this section, you may use more paper/ type more if you must. Just make sure you include all information you believe to be relevant to the issue.

What are your three most significant accomplishments of your organization?

1. _____
2. _____
3. _____

What are your three most significant disappointments of your organization?

1. _____
2. _____
3. _____

Describe your organization's top three strengths.

1. _____
2. _____
3. _____

Describe your organization's most aggravating weakness.

What problem we need help with is...

We do not do well when/ with...

How would you describe office politics in your organization?

How would you describe your state of well-being?

If I could do anything with the organization, I would...

Describe any goals or desires that you have yet to fulfill.

What has hampered you from achieving your goals?

Our biggest Concern is...

Other Information that may be helpful:

CLIENT SIGNATURE & DECLARATION

All the information contained herein is, to my knowledge, true and accurate. I have been given permission from my governing body to discuss a possible coaching relationship/ advising services with High Country Coaching.

Signature: _____ Date: _____

Print Name: _____