

Client Onboarding Questionnaire

Stacy Hartmann, CPC, ELI-MP

Purpose

This questionnaire will help you and your client get on the same page regarding the goals they have for the coaching partnership. It also includes any other information about your client that will help you serve them most powerfully.

Benefits

Using a questionnaire prior to the first session saves time and also helps the client clarify where they want to go and what they want to achieve as a result of the coaching partnership. It allows them to set intentions prior to the first session. It also provides a fantastic and powerful launching pad to starting the coaching relationship!

How to Use This Tool

Adjust the questions as you see necessary for your unique small business niche and use this as a guide to creating a client onboarding questionnaire. Once your questionnaire is set up, send it to your client along with your coaching contract. Invite them to complete it prior to your first coaching session.

[INSERT LOGO/BUSINESS NAME AND/OR IMAGE]

Private Client Questionnaire

As your coach, it's important for me to understand how you view the world in general and yourself in particular. Each person has a unique way of thinking, feeling, and interacting with those around him or her. While I will be supporting you on [insert key benefit client is seeking], the success of it really depends on YOU. Answer each of these questions as clearly and thoughtfully as possible. All answers are kept strictly confidential.

Special Note: To receive the highest value from this process, please respond to as many questions as possible. If you feel that a specific question does not apply to you or your specific situation, please indicate your reason in the space provided.

Full name: _____

Preferred name: _____

Birthdate: _____

Business name: _____

Year started: _____

Mailing address: _____

Home phone : _____

Mobile phone: _____

Email address (personal): _____

Main website: _____

Personal Information (optional)

Marital status: _____

Number of children: _____

Significant other's name: _____

Name(s) and age(s) of child(ren): _____

Please answer the following:

1. Outline your current monthly income (from business, as well as other sources).
2. Describe your income and vision/growth goals for the next year.
3. What must change in the next month to reach those goals?

4. What are your core beliefs and values that determine how you feel, think, act, and continue to evolve in your business and life?
5. What accomplishments do you feel must occur during your lifetime so that you will consider your life to have been satisfying, well lived, and with few or no regrets?
6. If there were a secret passion in your life, what would it be?
7. Do you have a written life and business plan (i.e., mission statement with goals, etc.)? If so, how often do you review it?
8. What is your 5-year goal?
9. Do you believe in the concept of a higher power (God, Spirit, Universe, etc.)? If so, describe the most useful and empowering aspects of your relationship with that higher power. If not, what reference point do you use?

10. What is missing in your life? What would make your life more fulfilling?

11. What is missing in your business? What would make your business more exciting and fulfilling?

12. What would you want your ideal working environment to be like if you could have it any way you wanted?

13. What would you want your ideal day, week, or month to be like if you could have it any way you wanted?

14. What is your biggest daily obstacle or challenge? Where do you stop in your business?

15. Describe your ideal client/customer/team member in your business. For example, private, group, or speaking clients could be your ideal clients.

16. What is the biggest public FEAR you are afraid others will find out in your business?

17. What makes you and your business unique?
18. If you could only deliver one service, what would it be?
19. Who are the competitors in your industry?
20. Name other leaders in your industry that are also doing what you are setting out to accomplish?
21. During this program, what specific project or goal do you want to focus on: (Please be very specific).
22. What else do you want me to know?
23. If the plan you develop in this program is in alignment with your goals, and can get you where you envision yourself, will you stick with it and make changes even when things appear to be falling apart at times? This plan has to succeed. Why?

24. What excites you about this upcoming year?

Once you have completed this evaluation, please send it to: **[enter email address]**.

Credit: The concepts inherent in this article are the author's interpretation of materials issued by iPEC®.