

Pre-Coaching Self-Assessment

Name: _____
Address: _____
Phone: _____
Email: _____
Occupation: _____
Age: _____ Relationship status: _____ Children: _____

Part I: Coaching Topic/Issue

What is the topic/issue you would like to be coached on?

What makes this a topic/issue for you?

How long have you been attempting to address this?

What have you tried so far?

Have your attempts been successful? Why or why not?

What do you think it will take to address this topic/issue successfully?

How might coaching help in this process?

Looking back on the history of your life until now, what would you say have been the defining moments and significant traumas in your life?

Part II: Domains of Your Life

Please describe your current activities and level of satisfaction in each of the following areas:

- work
- relationship
- contribution
- finances
- family
- spirituality
- body/health
- community
- creativity

What would you consider to be balance in these domains?

Part III: Self-Assessment

A. How would you describe yourself?

B. On a scale of 1–5, please assess your level of competence in each of the following developmental areas. For each area, give examples to support your assessment.

Cognitive- The ability to make observations, discern, analyze and synthesize what you have observed with intellectual rigor. This is the realm of the intellect.

Somatic- The ability to be aware of bodily states in oneself and others, while appropriately responding to those states with attention and care. This is the realm of awareness and care of the body.

Emotional- The ability to observe and discern your own and others' affect, mood and emotional state and to stay present and settled with whatever arises moment to moment.

Relational- The ability to initiate and sustain rich, mutually satisfying relationships in all areas of your life.

Spiritual- The ability to sense the interconnectedness of life, and to meaningfully live into context and purpose beyond the survival and success of one's own self.

Integral- The ability to balance and integrate these areas across the domains of your life.

IV. Reflection

What have been the five or six defining moments in your life?

Describe a time in your life that you felt vibrant, alive and fulfilled. What were the circumstances? How did you feel? What were you engaged in? What was the environment like? Who and what supported you? What is the feeling of support for you?

Reflect on the few significant people in your life, who have greatly influenced you. What about them touched you? Do you see any patterns in your life?

Imagine a time ahead, when you are ninety-seven. You are looking back on your life. How might your friends and family describe you? What qualities would they comment on?

Accomplishments? What about you inspires? What regrets do you have? What are you most proud of? Inspired by? What counsel would you have for yourself?

What practices currently support you in having a meaningful life? What allows you to sustain your practices? What takes you away?

What have you learned from doing this exercise:

About yourself?

About your life?

About your coaching issue?

Is there anything else that you would like to share that might be helpful?