



**PRIMARY PURPOSE**  
COACHING & CONSULTING

*Effective Leadership  
Balanced Living  
Lasting Impact*

## Welcome!

Welcome to Primary Purpose Coaching and Consulting! I am excited about working with you during this season of your life as you pursue your dreams and goals.

As your coach I am committed to you and your best interests. I will give you my undivided attention, ask the hard questions and reflect back to you what I hear. I will challenge you and encourage you to explore new avenues of fulfilling your God-given potential. The people I work with are ready, willing and able to make changes so that they can have lasting impact for good on the world through their personal lives, in their families, their churches, and their workplaces. It will be an honor to walk faithfully beside you as your coach.

Just a few things you'll want to note about coaching as we get started. Coaching is not to be confused with therapy. Coaching is forward-focused and goal driven. Our time together will be spent identifying the areas you want to work on, the values that drive you, and developing action plans for stepping into a future you would like to see. We will work on overcoming roadblocks, fulfilling your life purpose, and growing along the way.

In our time together, you will set the agenda of the calls. My job will be to manage and guide the process in ways that move you toward the objectives and goals you set. At times, I will make requests of you. I will rarely, but occasionally, make suggestions. However, each decision of what to do and the course of action you desire to take will be entirely yours. I will support you and champion you toward that end.

I encourage you to make a serious commitment to coaching, and provide yourself with adequate time to progress. Remember, coaching is an investment in yourself. I am confident that with a strong commitment to the coaching process, you will see the results you want as we walk together in the weeks and months ahead.

Please thoughtfully complete and return the three forms from this welcome packet. It will be of great benefit for both of us. Feel free to contact me with any questions at 502.233.2458

I'm looking forward to working together!

Timothy Snell, MA

Professional Leadership and Life Coach



## Getting Started

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This Welcome Packet includes three documents. Please complete and return each one. Please complete them and get them to me prior to our first coaching call.

### CLIENT INFORMATION

1. **Personal Information Form:** All client information is confidential and treated appropriately. I will keep a confidential record of your name, phone number and email address in order to meet the requirements for coach credentialing by the International Coach Federation ([www.coachfederation.org](http://www.coachfederation.org)).
2. **Coaching Relationship Form:** This survey gives me an idea of where you are and where you want to go in our coaching relationship.
3. **Life Satisfaction Survey:** This quick survey captures how satisfied you are with different parts of your life at the current time.



# Personal Information Form

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*(All personal information is confidential and will be treated appropriately.)*

## CONTACT INFORMATION

Full name: \_\_\_\_\_

Name you prefer to be called: \_\_\_\_\_

Address: \_\_\_\_\_

Home telephone: \_\_\_\_\_ Work telephone: \_\_\_\_\_

Cellular phone: \_\_\_\_\_

Fax number: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Web site: \_\_\_\_\_

## EMPLOYMENT INFORMATION

Occupation (what you do to earn a living): \_\_\_\_\_

Employer name: \_\_\_\_\_

## PERSONAL INFORMATION

Date of birth: \_\_\_\_\_

Marital status: \_\_\_\_\_ Number of children: \_\_\_\_\_

Significant other's name: \_\_\_\_\_

Wedding/special anniversary date: \_\_\_\_\_

Name(s) and age(s) of child(ren): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I would love to have a picture of you or one of you and your family for your file. I am very visual and photographs are a wonderful tool as I work for you and pray for you.

## Coaching Relationship Form

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1. Have you previously hired a life coach? Yes / No
2. If yes, what were your major areas of focus? \_\_\_\_\_  
\_\_\_\_\_
3. What is your life-long dream? \_\_\_\_\_  
\_\_\_\_\_
4. Where do you get your energy from? (What gets you going?) \_\_\_\_\_  
\_\_\_\_\_
5. Describe your ideal life 5 years from today. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. If you could go back and do three things differently in your life, what would they be? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. List three things that you like **most** about your life right now. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. List three things that you like **least** about your life right now. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Coaching Relationship Form

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9. Describe the things that are missing from your life today. \_\_\_\_\_

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10. Describe the things that would make your life more fulfilling. \_\_\_\_\_

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11. What opportunities are out there that you are not taking advantage of? \_\_\_\_\_

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12. If you had an extra 15 minutes in your day, how would you spend them? \_\_\_\_\_

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13. What are your three most important goals and why are they important? \_\_\_\_\_

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14. What life changes would you like to see in the next:

30 days: \_\_\_\_\_

90 days: \_\_\_\_\_

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## Coaching Relationship Form

1 year: \_\_\_\_\_  
\_\_\_\_\_

15. What negative attitudes, self-talk or beliefs block your progress? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

16. On a scale of 1 – 10, how willing are you to make changes in your life to do things differently?  
not very---1---2-----3-----4-----5-----6-----7-----8-----9-----10---extremely

Please explain your score: \_\_\_\_\_  
\_\_\_\_\_

17. Have you done any work to define your core values? If so, what are they? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18. Do you have a personal vision, purpose or mission statement? If so, what is it? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

19. Have you ever taken any self-assessment evaluations? If so, please share results:  
Myers-Briggs: \_\_\_\_\_ DISC: \_\_\_\_\_ Other: \_\_\_\_\_

20. Is your natural tendency to be a peacemaker or a rebel? \_\_\_\_\_

## Coaching Relationship Form

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22. How do you resolve conflict with:

Peers: \_\_\_\_\_

Family members: \_\_\_\_\_

Friends: \_\_\_\_\_

23. Are you now, or have you ever been, in therapy? Yes / No

For what issues? \_\_\_\_\_

\_\_\_\_\_

24. Describe the nature of your faith, if any: \_\_\_\_\_

25. Describe your relationship with God, if any: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

26. In what way do you sense God challenging you or trying to get your attention? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

27. What do you hope to accomplish through our time together? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

28. How will you measure the success of your coaching experience? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## LIFE SATISFACTION SURVEY

This survey captures how satisfied you are with different areas of your life.

Highlight a number (from 1 – 10) in each life area. 1 = completely dissatisfied. 10 = completely satisfied. Although your overall satisfaction likely changes from day to day, try to give an overall assessment of where you are at present. Skip any items that don't apply to you.

Physical Health	1----2----3----4----5----6----7----8----9----10
Mental / Emotional Health	1----2----3----4----5----6----7----8----9----10
Career / Employment Satisfaction	1----2----3----4----5----6----7----8----9----10
Financial Stability	1----2----3----4----5----6----7----8----9----10
Marriage / Romantic Relationship	1----2----3----4----5----6----7----8----9----10
Home Life (Immediate Family)	1----2----3----4----5----6----7----8----9----10
Parenting Relationship with Kids	1----2----3----4----5----6----7----8----9----10
Friends / Social Life	1----2----3----4----5----6----7----8----9----10
Recreation / Relaxation	1----2----3----4----5----6----7----8----9----10
Lifestyle (Degree of Busyness)	1----2----3----4----5----6----7----8----9----10
Personal Life Fulfillment	1----2----3----4----5----6----7----8----9----10
Personal Spiritual Life	1----2----3----4----5----6----7----8----9----10
Church / Religious Life	1----2----3----4----5----6----7----8----9----10