

## Intake Process for New Clients

- Calendar first Coaching session
- Send client's email address, phone number, and name to April (VA)
- April
  - a) Send Welcome E-mail with Welcome package
  - b) Send Docusign Contract (Coaching Agreement)
  - c) Add client to Gmail Contacts and add to Client group
  - d) Set client up as a DonnaSchilder.com User
  - e) Job Search / Sales: Set up client as a GetLinkedInNow.com User
- If Job Search Or Career - Send Job Search & LinkedIn Checklist**
- Add to Client Excel Spreadsheet for Accounting
  - Add Price / No. of Sessions
  - Payment Method
  - Start Date
  - Referral Source
  - Marketing Category
- Receive Docusigned Contract**
- Receive from Client for Welcome Package:
  - Personal Information Sheet - **Page 11**
    - Copy Personal Information Sheet into an email and send it to April
  - Learning Style - **Page 12**
- April
  - Add information form **Personal Information Sheet** to gmail contacts
  - Add client Mail Chimp Lists (Birthday, Clients, Get LinkedIn Now! E-Newsletter)

### First Session:

- Settle on a regular Coaching Session time/day and calendar it
- Obtain Credit Card or set up payment option
  - a) Add Credit Card Number to Authorize.net **recurring billing** (if applicable)
- Did they send a Link Request for LinkedIn?
- Review: **What to Expect from Our Coaching Relationship – Page 6 (Leadership Page 5)**
- Review Purpose of Coaching:
  1. Become happier and/or more successful.
  2. Determine who you are and where you are now.
  3. Determine where you're going and who you're going to become.
  4. Choose and plan how you're going to get there.
  5. Help you hold yourself accountable to getting there.
  6. Helping you overcome barriers to your success; reinforce new attitudes, beliefs and behaviors; and keep the focus on your goals.
- If Life Coaching: Review how coaching is different than therapy
- Optional: Fill out Happiness Metric With Client (if Applicable)
- Has the client indicated how long they plan to engage me as their Coach?
- Fill out "Goals for Coaching Form" Together – **Page 9**
- Ask the client to do a Life, and/or Career Vision and/or Leadership Vision**
- Review my DonnaSchilder.com resources
- Job Search / Sales: Review GetLinkedInNow.com resources

# Goals for Coaching

Identify five or more goals for Coaching. For example: Become more assertive, work on my resume, or communicate my expectations more clearly.

1. \_\_\_\_\_

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2. \_\_\_\_\_

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3. \_\_\_\_\_

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4. \_\_\_\_\_

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5. \_\_\_\_\_

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6. \_\_\_\_\_

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7. \_\_\_\_\_

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8. \_\_\_\_\_

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9. \_\_\_\_\_

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10. \_\_\_\_\_

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11. \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

### Satisfaction with Life Scale

|   | Not True |   | Moderately True |   |   | Absolutely True |   |
|---|----------|---|-----------------|---|---|-----------------|---|
| In most ways my life is close to my ideal                 | 1        | 2 | 3               | 4 | 5 | 6               | 7 |
| The conditions of my life are excellent                   | 1        | 2 | 3               | 4 | 5 | 6               | 7 |
| I am satisfied with my life                               | 1        | 2 | 3               | 4 | 5 | 6               | 7 |
| So far, I have gotten the important things I want in life | 1        | 2 | 3               | 4 | 5 | 6               | 7 |

Date: \_\_\_\_\_

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