



Individual Coaching Intake & Discovery Form

Explore your potential

Reimagine your possibilities

Move forward with purpose

WELCOME

This form helps Creative Hyū Support Hub understand your needs, goals, expectations, current reality and preferred way of being coached. It also helps establish the practical foundations for a safe, purposeful and accountable coaching relationship.

There are no right or wrong answers. Share only what you are comfortable sharing.
Your responses are intended to support the coaching process and do not constitute a medical or psychological diagnosis.

1. YOUR INFORMATION

Full Name

Preferred Name

Email Address

Telephone / WhatsApp

Country / Island

Age ☐ 30-39

☐ 40-49

☐ 50-59

☐ 60+

☐ Prefer not to say

☐ Virtual

☐ In person

☐ Hybrid

☐ Undecided

Preferred communication method

2. WHAT TYPE OF COACHING ARE YOU SEEKING?

☐ Life Coaching

☐ Leadership / Workplace Coaching

☐ Menopause Coaching

☐ Career / Transition Coaching

☐ Andropause / Midlife Coaching

☐ Combination / Integrated Coaching

☐ Emotional Intelligence Coaching

☐ Unsure

☐ Organisational Development Coaching

Other / combination

3. YOUR REASON FOR SEEKING COACHING

1. What do you want to achieve from coaching?

2. What prompted you to seek coaching now?

3. What specific goal, challenge or issue would you like to explore?

4. How will you know that coaching has been successful for you?

4. YOUR CURRENT REALITY

Rate each area from 1 (very dissatisfied / difficult) to 10 (very satisfied / working well).

Area	Rate 1-10
Personal wellbeing	
Emotional wellbeing	
Energy / vitality	
Sleep/restoration	
Confidence/self-belief	
Relationships	
Career / work	
Leadership	
Work-life balance	
Purpose / direction	
Self-awareness	
Ability to manage change	

5. Which area most needs your attention right now, and why?

5. SELF-AWARENESS, EMOTIONAL INTELLIGENCE & CHANGE

6. How would you describe yourself at this stage of your life or career?

7. What are you doing well that you would like to build on?

8. What patterns, behaviours or beliefs may be holding you back?

9. How comfortable are you recognising and expressing your emotions?

☐ ☐ ☐ ☐

10. When you are under pressure, what usually happens to you?

11. What feedback have you received that you would like to understand or work on?

12. What conversation with yourself, another person or your organisation have you been avoiding?

6. LIFE, MIDLIFE, MENOPAUSE & ANDROPAUSE

Complete the relevant parts only. This section is for coaching exploration and is not a medical assessment.

- ☐ Perimenopause
 ☐ Menopause
 ☐ Post-menopause
 ☐ Exploring possible midlife changes
☐ Andropause / male midlife changes
 ☐ Supporting a partner
 ☐ Workplace midlife concerns
 ☐ Not applicable

Areas you may wish to explore:

- ☐ Energy
 ☐ Sleep
 ☐ Mood / emotions
 ☐ Focus / concentration
 ☐ Confidence
☐ Identity / sense of self
 ☐ Relationships
 ☐ Work / career
 ☐ Lifestyle / habits
 ☐ Communication

13. What changes or experiences are you currently trying to understand?

14. What support would make this transition easier to navigate?

7. ORGANISATIONAL DEVELOPMENT, LEADERSHIP & WORKPLACE COACHING

- ☐ Employee
 ☐ Manager
 ☐ Senior Manager
 ☐ Executive
☐ Business Owner
 ☐ HR / People Professional
 ☐ Entrepreneur
 ☐ Other

Areas to explore:

- ☐ Leadership
 ☐ Conflict
 ☐ Boundaries
 ☐ Career direction
☐ Team effectiveness
 ☐ Change
 ☐ Difficult conversations
 ☐ Workplace wellbeing
☐ Culture
 ☐ Performance
 ☐ Psychological safety
☐ Communication
 ☐ Employee engagement
 ☐ Emotional intelligence

15. What is happening in your work or organisational context that you want to explore?

16. What would make your professional life, leadership or team experience more effective or sustainable?

8. GOALS, ASPIRATIONS & FUTURE SELF

17. What would you like to start doing?

18. What would you like to stop doing?

19. What would you like to continue doing?

20. If coaching works well, what will be different in 3-6 months?

21. What would your future self thank you for doing now?

9. READINESS, ACCOUNTABILITY & COMMITMENT

Readiness for change (1-10): _____

22. Why did you choose that number?

23. What would move you one point higher?

24. What are you willing to do between sessions to support your goals?

I understand that I am responsible for my choices, actions and results, and that coaching supports me in developing my own solutions and strategies.

☐ I agree

☐ I would like to discuss this further

10. HOW DO YOU WANT TO BE COACHED?

25. How can I best coach you? What should I know about the way you learn, reflect or process information?

☐ Visual ☐ Conversation ☐ Writing / journaling ☐ Practical exercises

☐ Reflection time ☐ Examples / stories ☐ Combination

26. Are you comfortable with your coach interrupting, challenging you, asking difficult questions, reflecting your words back to you, or assigning exercises between sessions?

☐ Yes ☐ Mostly ☐ Please discuss with me first

27. What do you need from your coach when you are struggling or stuck?

11. THE COACHING RELATIONSHIP

Creative Hyú coaching is collaborative. You are the expert in your life; the coach helps you connect with your own wisdom, clarify goals, increase awareness and take purposeful action. Coaching is confidential and non-judgmental. It is not therapy, counselling, medical treatment or a substitute for other professional services.

You can expect your coach to:

- ☐ Help clarify and maintain focus
- ☐ Hold you accountable for agreed actions
- ☐ Ask powerful questions
- ☐ Challenge assumptions and patterns
- ☐ Support self-awareness
- ☐ Encourage and support you
- ☐ Help you develop your own solutions

Your coach asks you to:

- ☐ Be honest and open
- ☐ Participate actively
- ☐ Take responsibility for decisions/actions
- ☐ Communicate when something is not working
- ☐ Complete agreed actions where possible



12. ADMINISTRATION & PRACTICAL ARRANGEMENTS



- ☐ Coaching agreement reviewed
- ☐ Agreement signed / returned
- ☐ Client information complete
- ☐ Fees / payment discussed
- ☐ Billing process confirmed
- ☐ Cancellation / missed appointment policy discussed
- ☐ Communication arrangements confirmed
- ☐ Next appointments scheduled
- ☐ Questions answered

Preferred session frequency:

- ☐ Weekly ☐ Fortnightly ☐ Monthly ☐ Programme / package ☐ As agreed

Preferred session length:

Other practical considerations:



13. FIRST SESSION FOCUS

29. What would make today's session valuable to you?

30. What is the one thing you most want to leave today's session with?

31. What is one action you are willing to take after this session?

32. What is your biggest win or learning from today's conversation?

14. CONFIDENTIALITY, PRIVACY & SCOPE

- ☐ I understand coaching is confidential, subject to applicable legal / professional obligations.
- ☐ I understand coaching is medical diagnosis/treatment, psychology, counselling or emergency care.
- ☐ I understand I may be encourage to seek another qualified professional where a need falls outside coaching.
- ☐ I consent to Creative Hyü Support Hub using the information in this form to support and manage my coaching relationship.
- ☐ I understand I may ask questions about the coaching process at any time.

Client Name: _____

Date: _____

15. COACH USE ONLY - INTAKE SESSION RECORD

Use this section during the intake session to capture the key coaching picture, practical arrangements and the agreed starting period.

Coaching Intake Items	Notes / Agreements
Client's primary aims / desired	
Key motivation - why coaching now?	
Current situation /life or work context	
Key strengths/resources	
Key themes or patterns notices	
Preferred coaching style/learning style	
Agreed coaching focus for next session(s)	
First action / accountability commitment	
Potential referral or additional professional supports to consider	
Next appointment(s)	
Billing / administration notes	

CREATIVE HYÜ SUPPORT HUB

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Coaching • Training • Learning • New Perspectives