

**** CONFIDENTIAL. THIS INFORMATION WILL NOT BE SHARED WITH ANYONE ****

Please give consideration to, and complete, as much of this “Getting to Know You” resource as you can and are willing to do. It will help optimize our time together and realize tangible results for you faster.

Make some quiet time to yourself. Allow approximately one hour. Grab a cup. Get a surface to write on. Find a pen or pencil. Yes – writing is required. Or open your electronic device and make sure you have enough of a charge. If you have an electronic version of this document (*it’s in MS Word format*) you can type directly into the cells (*below*). They will expand to your content.

Most helpful (*for both of us*) is to complete this and send it to me no later than two days prior to our first appointment. (See “Sending Suggestions” at the end of the document.) Sending this to me is not required; it just optimizes our first appointment so that you won’t have to use our phone time answering these same questions verbally. Doing so also helps me to be more prepared to laser-focus on your intention for connecting with me. If you’re writing your responses, please print or write neatly so I can read it. If you will scan to send, use black ink or a firm pencil script. If you end up not able to send this in time, no worries. We’ll go over much of this in our first appointment. I certainly don’t intend to add more pressure to your life!

That’s it for ~~instructions~~ requests. This is not “back to school”. This *will* allow you to focus, think through where you are and what brings you to this point, and what your intentions are for our time together.

<p>What prompted, caused, or inspired you to seek an Implementation Strategist?</p>	
<p>Why?</p>	
<p>What do you want (or need) to work on?</p>	
<p>Why? What does it mean to you to work on this?</p>	

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<p>What have you done so far relating to this?</p>	
<p>How are you progressing? How do you <i>feel</i> about your progress?</p>	
<p>What will “completion” or “success” look like to you (in regards to this opportunity)?</p>	
<p>What will “completion” or “success” feel like to you (in regards to this opportunity)?</p>	
<p>In what way(s) are you stuck? What’s stopping you from moving forward with this opportunity on your own?</p>	
<p>What do you hope / expect / want / plan to accomplish with our time together?</p>	
<p>Coaching is not therapy. Are there considerations in your life – right now – that could undermine or inhibit your progress with the opportunity we will work on? <i>(“Yes” or “No” is sufficient. Yet if you can share brief details it will be helpful.)</i></p>	
<p>Have you used a coach or advisor, or had a mentor before? For what purpose?</p>	

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<p>How did that experience go for you? <i>(Did you accomplish what you set out to accomplish? Was that person the right person for the right time? Did you grow, learn, or move forward with what you needed?)</i></p>	
<p>Are you currently using other coaches / advisors / mentors? For what purpose? <i>(It's okay by me if you are! Different people bring different perspectives and "reach" you differently. It simply helps to know whether you are getting multiple perspectives on this same opportunity you and I address.)</i></p>	
<p>How is the experience (with others) going for you?</p>	
<p>Describe a "typical day" – professionally – for you. <i>(I know...there is no such thing as a "typical day". They're all different with your professional demands. Humor me. Describe a composite picture of your typical day.)</i></p>	
<p>Describe a "typical day" – personally – for you. <i>(Ditto the above. Time alone? With family & friends? Faith-based? Indulging in self? Health and activity?)</i></p>	
<p>Describe your implementation style. <i>(Do you focus on one thing at a time? Are you a multi-tasker – and does that work for you? Do you get stuck in overload? Are you scattered – start multiple tasks yet finish few, or jump from one strategy to another? Are you disciplined, systematic, methodical? Procrastinate? Impulsive? Other description?)</i></p>	
<p>What do you want / need / expect <u>from me</u> from our time together? How may I best serve you?</p>	

Send Instructions ... You have choices!

1. All-electronic: You've used the MS Word document and typed your responses into it. That's easy! Name a copy of your file "[Lastname_Firstname] Intake" and attach it to an e-mail to Sylvia@SpringboardTraining.com. Only I open e-mail at this address. My staff does not. Your document will remain confidential.
2. You've written your responses and have a scanner: Scan your pages and save the scanned images as a PDF file. Continue as above with filename and e-mail attachment.
3. You've written your responses and will actually mail them to me: Address your envelope to Sylvia Henderson, 18005 Lafayette Dr., Olney, MD 20832. Use adequate postage. And in small print below your return address write "[Lastname_Firstname] Intake". No one else will understand the small note and it will keep me from throwing what would otherwise be an unfamiliar piece of mail into the "it's hand-written so I'll open it sometime later rather than flat-out throw it in the junk mail now" pile.

I'm looking forward to our time together, and appreciate your completing this intake tool.

Sylvia