

Coaching Assessment

Client Information

Name: _____

Organization/Company: _____

Role/Position: _____

Contact Information: _____

Preferred Communication Method: _____

Coaching Context

Type of Coaching (e.g., leadership coaching, career coaching, life coaching, etc.):

Purpose/Goal of Coaching: _____

Expected Duration of Coaching Engagement: _____

Previous Coaching Experience (if any): _____

Client Background

Briefly describe the client's professional background and experience:

What are the client's key responsibilities and challenges in their current role?

Client's Strengths

Based on your initial assessment, what are the client's key strengths and competencies?

How do these strengths align with the organization's values and objectives?

Areas for Development

What are the client's potential areas for development or improvement?

How do these development areas impact the client's effectiveness in their role?

Coaching Goals

What specific goals does the client want to achieve through coaching?

Are there any short-term and long-term goals that the client wants to work on?

Coaching Competencies Assessment

- Meeting the Ethical and Professional Standards: Assess the client's understanding and application of coaching ethics and standards.
- Establishing the Coaching Agreement: Evaluate the client's clarity about the coaching process and their expectations.
- Establishing Trust with the Client: Observe the client's level of trust and openness during the coaching engagement.

- **Coaching Presence:** Assess the client's receptivity and engagement during coaching sessions.
- **Active Listening:** Evaluate the client's ability to listen actively and respond effectively.
- **Powerful Questioning:** Observe the client's capacity to ask questions that lead to meaningful insights and reflection.
- **Direct Communication:** Assess the client's communication skills and their impact on coaching sessions.
- **Creating Awareness:** Evaluate the client's ability to integrate information and develop self-awareness.
- **Designing Actions:** Observe the client's aptitude for setting clear and actionable goals.
- **Planning and Goal Setting:** Assess the client's capability to develop and maintain an effective coaching plan.
- **Managing Progress and Accountability:** Evaluate the client's commitment to taking action and staying accountable.

Coaching Plan

Based on the assessment and coaching goals, outline the plan for the coaching engagement, including the frequency and format of coaching sessions.

Specify the coaching tools, exercises, or assessments that will be used to support the client's development.

Action Plan

What specific actions will the client take to work on their areas for development and achieve their coaching goals?

How will progress be measured and tracked?

How will the client be held accountable for their commitments?