Client onboarding form

[Your business name] · [package name]

Part 1: About you

1. What would you like me to call you?

2. What's the best email address and phone number for you?

3. Which time zone are you in?

Part 2: Your goals

4. What made you decide to work with a coach now?

5. By the end of our work together, what would you like to be different?

6. How will you know you're making progress?

7. What usually gets in the way when you try to change something?

Part 3: How we'll work

8. Would you rather meet by video, by phone or in person?

9. Do you prefer to be challenged directly or encouraged gently?

10. When would you like to start?

Part 4: The terms

Program: [number] sessions of [length] minutes, [weekly / every two weeks]. Price: [total price], with a deposit of [deposit] today that counts toward it.

Moving or cancelling: free with at least [24] hours' notice. Later changes and missed sessions count as used. Refunds: sessions not yet held are refunded [minus the deposit].

Confidentiality: what you share stays between us, unless the law requires otherwise or someone is at serious risk of harm. Coaching isn't therapy, medical care, or financial or legal advice.

Part 5: Your signature

By typing your full name below, you sign these terms electronically, just as you would on paper.

Full name: _____ Date: _____

Part 6: Your deposit

Deposit due today: [deposit], paid by card. It holds your place and counts toward [package name].