

You can print and fill out this form by hand and either scan and email it to me (Gary@GaryLSmith.com) or fax it to 866.927.7002.

Name *

Primary Email *

Company Name (if applicable)

Website (if applicable)

Best Phone Number

Country

Time Zone

Reason for your conversation with Gary

- Interest in a personal coach
- Interest in a business coach
- Interest in a coach for my ministry

If you do not have a business or ministry you can skip this section.

Years in business:

Number of Employees:

Overall Business Is:

- Trending Up
- Flat
- Trending Down

Where else can I find you online?

If you are in business, what is your target market/ideal client?

I would like to be more visible in my marketplace/niche.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

My clients refer me all of the time.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I love my website and believe it accurately represents what I do.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I'm confident my social media marketing is working.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I repurpose and leverage my content consistently.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I'm confident that all of my customers/clients are happy with what they receive.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

My business has a process to quickly respond to customer/client requests.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I have a new client/customer welcome process that works well.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I have a clear process flow for attaining new clients/customers/patients and feel great in sales conversations.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I charge the right amount for the results I deliver in my work.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I have a comprehensive marketing plan and use it consistently.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I feel great about my current marketing.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I feel great about my current PR.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I feel great about my current business operations.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

This is the end of the business/ministry section.

What are your favorite ways to learn?

- Reading emails
- E-Books
- Audio Recordings
- DIY Online Courses
- Worksheets and Checklists
- Physical Books
- Videos
- Live/In Person Events/Workshops
- Group Online Courses
- One-On-One Mentoring and Coaching
- Other (describe) _____

Why are you looking for a coach/consultant now?

Are you currently working with anyone?

Intake Questions: Please answer all questions frankly and to the best of your knowledge. Remember that there are no right or wrong answers, so be open with your responses. The more I know, the better I am able to assess the situation and be of service to you. Please take as much time as you need to thoughtfully answer the questions.

What is the current purpose of your life, business, or ministry?

What do you do?

What drives you? What motivates you? What is your "WHY"? What gets you really excited about life and your business or ministry?

What were your 3 biggest accomplishments over the last 12 months?

What do you see as the challenges that are holding you back from reaching your goals this year?

If you could wake up tomorrow to the perfect life, what would it be like? What would it look like? What would it feel like?

What is the number 1 thing you are avoiding doing right now? (We all have at least one!)

If you could design a support and achievement program just for you, how would you complete this sentence? Gary, it would be amazing if...(list as much as you'd like)

On a scale of 0-10, how important is it for you to overcome your challenges and achieve your goals today?

What questions haven't I asked you that I should be asking, and what would be your reply?

How did you find me? If you were referred by someone, I'd like very much to thank them.

Your Current Reality

Identify where you are in relation to each statement below. Please identify the response that most closely matches your current reality. Going with your first reaction is often the right answer. No one is an expert at everything, but many people need some kind of attention in the areas noted below. There are no right or wrong answers. **What is your current reality in relation to these statements?**

I don't procrastinate

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I never struggle with self doubt

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

Everything is in place for me to take my life or my business to the next level!

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

Relaxing when I take time off or go on vacation is easy.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

It is easy for me to tell others "no".

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I'm clear about my focus, and I never find myself thinking about all of the different possibilities and ideas I have.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I'm very clear about my priorities and I'm confident with my priority setting process.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I feel satisfied at the end of the day with what I have accomplished.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

My life is booming! I'm looking to leverage what I have to move to the next level.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I trust my "inner voice"/gut and follow it when making decisions.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

My daily life reflects the quality of life I want.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I'm confident that I am focusing in the right places and leaving a positive legacy.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I have a proven system that feels good to me and is fun.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I effectively use technology where appropriate in my life.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I am interested in creating passive income.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

My mindset about money in my business and life is excellent.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I know what income I need to make this year to live the life I want.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

I have great personal and business success. I simply want to do and be more.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

My accounting/finance is functioning well.

- This is me!
- This is kind of me
- I don't think this is me
- This is not me

Thank you!