Coaching readiness questionnaire

Before referring a client to a coach, or before you begin coaching them yourself, consider the following questions. This will help ensure the client is ready to begin coaching.

This form is **NOT** to be given directly to a client, but serves to help you to identify coaching potential in a client.

	✓ Yes	✓ No	Notes
Client appears prepared to tackle their money issues; to close the gap between where they are now and where they want to be.			
Client seems open to ideas and new ways of doing things to improve their financial situation.			
Client seems willing to reflect on and discuss past money decisions they have made.			
Client understands that in coaching, the "participant does the work," not the coach.			
Client has the ability (communication skills, confidence etc.) to immediately tell the coach if there are issues with the coaching relationship so action can be taken to improve the situation.			
Client is in need of additional tools, resources and concrete approaches to set money goals.			
Client is prepared to devote the time to make money coaching work; including meeting with the coach and completing follow-up activities.			
Client can see money coaching as an investment in their personal growth.			
! Client is interested in coaching, however; right now something out of the ordinary is going on in their personal life that might prevent them from attending all of the coaching sessions.			
Client feels 'stuck' and recognizes the need to focus on their financial situation and set goals.			

! If the client answered "Yes" to the flagged question, coaching may not be the right fit right now.

Adapted from *Coaching and Philanthropy: An Action Guide for Nonprofits*