



EXCEPTIONAL SALES
PERFORMANCE

Coaching Questionnaire

1. Share five (5) facts about your personal background; anything that you believe will help me understand you and allow me to better support you.
2. What are your top five accomplishments, thus far, in your life?
3. What do you want to make sure you do/accomplish in your lifetime?
4. What habits, activities, thoughts, etc. do you believe you need to let go of or simplify in order to truly move forward?
5. What are a few burning short-term goals that you want to achieve over the next seven (7) weeks? What changes or actions are needed for these to be accomplished?
6. List several long-term goals. From that list chose two goals you wish to start working on in the coaching relationship.

7. Where are you most irresponsible?
8. What motivates you? What do you get energy from?
9. What does being coached mean to you? How can I best coach you?
10. How might you sabotage the coaching relationship and/or your coaching goals?
11. How do you like to be appreciated and celebrated for your progress?
12. How will you know you are getting what you want?
13. How do you perceive the financial advising/insurance world? How do you perceive your place in it?

Any other comments?