



# Coaching Forms Pack: 6 Fill-In Templates for Coaches

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*Six ready-to-use forms covering every stage of the client relationship, from  
discovery call to testimonial.*

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## How to Use This Template

Copy the form you need into your own document, email, or Paperbell client portal, and send it to clients at the stage noted under each form heading. Adjust the wording to match your voice, but keep the core questions: they are designed to surface the information you actually need at each step.

Made for coaches by Paperbell — the all-in-one coaching practice tool.

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## 1. New Client Discovery Call Form

Send this as soon as someone books a discovery call, before the call happens.

Name: \_\_\_\_\_

Email or phone: \_\_\_\_\_

Current situation and main challenge: \_\_\_\_\_

What you've already tried: \_\_\_\_\_

Why now (timeline and urgency): \_\_\_\_\_

Budget or investment readiness: \_\_\_\_\_

## 2. Session Prep / Pre-Session Check-In Form

Send this 24 hours before each session.

Wins since our last session: \_\_\_\_\_

Current obstacle or stuck point: \_\_\_\_\_

Energy or mood today (1-10): \_\_\_\_\_

What you want to walk away with today: \_\_\_\_\_

## 3. Post-Session Feedback Form

Send this right after a session, or at set checkpoints (for example every four weeks) in a longer program.

What resonated most this session: \_\_\_\_\_

What felt less useful or unclear: \_\_\_\_\_

Progress toward your goal (1-10): \_\_\_\_\_

Anything you wish you'd brought up: \_\_\_\_\_

Other feedback for your coach: \_\_\_\_\_

## 4. Testimonial Request Form

Send this right after a client hits a milestone or wraps their program.

Permission to use your name and photo (yes / no / anonymous): \_\_\_\_\_

What your situation looked like before coaching: \_\_\_\_\_

The specific result or shift you experienced: \_\_\_\_\_

A quote we can use as-is: \_\_\_\_\_

Open to a video testimonial? (yes/no): \_\_\_\_\_

## 5. Coaching Program Application Form

Gate this behind your program's application page, before offering a sales call.

Current situation and goal: \_\_\_\_\_

Why now (motivation and urgency): \_\_\_\_\_

What you've already tried: \_\_\_\_\_

Investment readiness: \_\_\_\_\_

Availability for the program schedule: \_\_\_\_\_

## 6. Goal and Progress Tracking Worksheet

Fill this out together at kickoff, then revisit every few sessions.

Original goal statement: \_\_\_\_\_

Milestone 1: \_\_\_\_\_ Target date: \_\_\_\_\_ Check-in rating: \_\_\_\_\_

Milestone 2: \_\_\_\_\_ Target date: \_\_\_\_\_ Check-in rating: \_\_\_\_\_

Milestone 3: \_\_\_\_\_ Target date: \_\_\_\_\_ Check-in rating: \_\_\_\_\_

Adjustments made along the way: \_\_\_\_\_

Final outcome summary: \_\_\_\_\_