



ENNEAGRAM COACHING CLIENT INTAKE FORM

Dear Client,

I'm excited to be accompanying you on an exploration of the Enneagram and how to use it for self-awareness and personal growth! Before we get started, it will be helpful to me to learn more about you and your goals for coaching through the Intake questions below. It will be helpful to you to know what to expect from our time together.

My coaching will guide you to focus on two areas: ***Inward Enneagram Work***, and ***Outward Enneagram Work***. In Inward Enneagram Work, we will focus on determining your dominant Personality Type, and Subtype or Instinct. I will encourage you to use non-judgmental self-observation, or the "Inner Observer" to notice the patterns, habitual reactions, fixations and core beliefs of your Enneagram style that are counterproductive, as well as discovering those that are your gifts. In Outward Enneagram Work, you'll be encouraged to observe the ways in which your Enneagram Type and Instinct express themselves in your relationships. You'll be encouraged to identify ways to use the strengths of your Type to relax unproductive behaviors and reactions and to begin to make specific changes which will enhance your relationships, both with yourself and with others.

I have found the Enneagram to be completely transformative and I'm passionate about helping others to learn how to use this system! Thank you for taking this step, and I look forward to working with you!

Sincerely,

Rob

ENNEAGRAM PARK CITY

Rob Harter, DMin

435.776.5173

rob@robharter.com



Please fill out the following questionnaire, and we will discuss it during our first session.

Client Name: _____

Address: _____

City, State, Zip: _____

Email: _____

Cell Phone: _____

Permission to text you (regarding appointments, etc.)? **YES** **NO**

Intake Questions:

What is your highest level of education?

Who do you consider to be your immediate family (*partner, children, etc.*)?

What are you hoping to gain by participating in Enneagram Coaching? Do you have goals for this experience? (It's okay if you don't!)

Briefly describe your level of familiarity with the Enneagram:

What is your Enneagram Type/Subtype, if you know it?

What type of Coaching, Therapy, or Self-Help have you participated in before coming here?

Is there anything about your medical or psychological history that you would like me to know, such as a history of depression, anxiety, addiction, etc.?

What is your best personality trait... the inborn gift that has been with you since you were small?

What personality trait seems to repeatedly get in the way of actualizing that special gift?

If you could easily change three things about yourself, what would they be?

How did you hear about Rob's Enneagram Coaching:

- Personal referral, *person who referred you:* _____
- Rob's website RobHarter.com
- Rob's podcast the Nonprofit Leadership Podcast
- Other _____

PROCEDURES:

- I use Zoom for majority of my sessions but can meet in person.
- You can text me on my cell phone if zoom is not working.

Professional Coaching Acknowledgement

I acknowledge as part of my working relationship with Dr. Rob Harter that I will be provided professional coaching services. We will have specifically designated components of our professional engagement dedicated to coaching exchanges and collaboration. All information will be held as confidential unless I, the client, request otherwise in writing. I consent to be included in Rob's Client Coaching Log for his ongoing training and certification. I recognize that Rob's professional coaching is distinctly different from counseling and psychotherapy. Rob is *not* a licensed therapist and what Rob provides is *not counseling*, nor does it deal with the diagnosis and treatment of emotional problems. I also recognize that Rob's professional coaching does not constitute medical consultation or treatment.

Client Signature : _____ Date : _____

Prior to your first session, please email this form to: rob@robharter.com

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