



# Productivity Coaching Intake Form



Name: \_\_\_\_\_ Date: \_\_\_\_\_ DISC Profile: \_\_\_\_\_

Market Center name: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

HOME Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Time zone: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Preferred way to communicate messages: \_\_\_ Phone/voicemail \_\_\_ Email \_\_\_ Text messaging \_\_\_ IM

Married / Divorced / Single / Widowed / Engaged / Other      Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Spouse/Significant other: \_\_\_\_\_ Anniversary/Length time together? \_\_\_\_\_

His/Her Occupation: \_\_\_\_\_ Company: \_\_\_\_\_

Children's names & ages (Specify boy/girl with unisex names):  
\_\_\_\_\_

Pets: \_\_\_\_\_

## “About you personally”:

- Where are you from originally? \_\_\_\_\_ Spouse: \_\_\_\_\_
- Where did you go to college? \_\_\_\_\_ Degree(s): \_\_\_\_\_
- What do you do for fun? \_\_\_\_\_
- What is your religious affiliation (if any)? \_\_\_\_\_ Church? \_\_\_\_\_
- Favorites: Color: \_\_\_\_\_ Food: \_\_\_\_\_ Restaurant: \_\_\_\_\_ Flower: \_\_\_\_\_
- Favorite place(s) to vacation: \_\_\_\_\_
- Vacation destination on your wish list: \_\_\_\_\_
- What are some of your personal goals: \_\_\_\_\_  
\_\_\_\_\_
- Do you have any care giving duties other than your children (i.e. eldercare, etc): Y/ N \_\_\_\_\_
- What motivates you? \_\_\_\_\_

### Instructions:

1. Fill out immediately and completely
2. Scan document and email to [info@spencercombs.com](mailto:info@spencercombs.com)

**“About you professionally”:**

- Former occupation(s) (if any): \_\_\_\_\_
- How long in real estate: \_\_\_\_\_ Highest level of production in sales business: \_\_\_\_\_
- Income goal this year: \_\_\_\_\_ Next year: \_\_\_\_\_ 5 years \_\_\_\_\_ Eventual: \_\_\_\_\_
- How many hours a week will you commit to work to hit your income goals: \_\_\_\_\_
- What are your educational goals/plans: \_\_\_\_\_
- What is your “next”: \_\_\_\_\_ When: \_\_\_\_\_ Why: \_\_\_\_\_
- On a scale of 1-10 (1=no knowledge to 10=mastery level) rate your knowledge of the tools you have available in the KW System.

\_\_\_\_\_ MREA Book

\_\_\_\_\_ BOLD

\_\_\_\_\_ CAMP 4:4:3

\_\_\_\_\_ SHIFT Book

\_\_\_\_\_ Lead generation 36:12:3

\_\_\_\_\_ Use of Social Media

\_\_\_\_\_ MREA Business Planning Class

\_\_\_\_\_ KWU Course offerings

\_\_\_\_\_ KW Connect offerings

- Do you have a written business plan? Yes / No (if yes, please provide)
- Are you currently tracking your numbers? Yes / No (if yes, provide form)
- Have you read the SHIFT book cover to cover? \_\_\_\_\_ If yes, how many times? \_\_\_\_\_
- Do you have a computerized database? If yes, which one: \_\_\_\_\_
- How many hours in your current work week? \_\_\_\_\_ What time do you start each day? \_\_\_\_\_

**Stats:**

Average sales price in your market area: \_\_\_\_\_

Average commission on listing side: \_\_\_\_\_

Average commission on buyer side: \_\_\_\_\_

**What are the top 3 challenges you want to address on your coaching calls:****Instructions:**

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