

# PN Initial Assessment & Triage Questionnaire



.....  
NAME

.....  
DATE

## Coaching tips

- You can use this form both for an initial baseline assessment and to track progress periodically.
- Client responses to questions can suggest what areas to work on and track.
- You can also use questions such as the 1-10 numeric scores to track objective progress in particular areas (e.g., "Right now, how would you rank your overall eating / nutrition habits?").

## Tell me more about yourself.

By learning more about your lifestyle and your habits, I can take better care of you and make sure coaching is a good fit for your goals and individual needs.

.....  
DATE OF BIRTH

.....  
GENDER

## Staying in touch

Please print clearly.

.....  
EMAIL

.....  
MOBILE PHONE

.....  
HOME PHONE

### How do you prefer me to contact you?

- Email
- Phone
- Skype or other video chat
- Text
- Other (please specify):  
.....  
.....

Emergency contact name:  
.....

Emergency contact phone number:  
.....

## Coaching tips

- Ensure that all contact information is complete and correct.
- Confirm with client how they would like to be contacted, and how often.



## What do you want?

**In general, what are your goals?** Check all that apply.

- |   |   |   |
|---|---|---|
| <input type="radio"/> Lose weight / fat | <input type="radio"/> Improve physical fitness      | <input type="radio"/> Get control of eating habits    |
| <input type="radio"/> Gain weight       | <input type="radio"/> Look better                   | <input type="radio"/> Get stronger                    |
| <input type="radio"/> Maintain weight   | <input type="radio"/> Feel better                   | <input type="radio"/> Physique competition / modeling |
| <input type="radio"/> Add muscle        | <input type="radio"/> Have more energy and vitality | <input type="radio"/> Improve athletic performance    |

### Coaching tips

- Don't take any of these at face value. Clients may change their goals, say what they think you want to hear, think they want one goal but really want another, and / or simply not have a clear idea of what these categories mean.
- Use these categories as discussion starters. Ask for clarification and help clients explore how they will know when they reach their goals.
  - "When you say 'improve physical fitness', what specifically do you mean by that?"
  - "When you say 'get stronger', is that in a particular exercise? Or just an overall feeling? How will you know when you are 'stronger'?"
  - "You've listed 'look better'. Is there a particular event you want to look better for, or is this more of a general thing? What does 'look better' mean to you exactly?"
- Revisit this question above periodically to ensure that these goals are still meaningful and important to your client.
  - "On [date], you said that goal X was important to you. Does that still feel true?"

**Please list all of your concerns about your health, eating habits, fitness, and / or body.**

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**Coaching tips**

- This section starts off with a “brain dump” or “airing of grievances” — all the things that your client is potentially worried about, frustrated with, etc.
  - The larger purpose here in the first question is for your client to simply brainstorm, to get their wishes out of their head and on to paper, and to expose their concerns to the light of day.
  - The simple act of writing down their concerns will sometimes start changing those concerns... without you doing anything at all!
- **IMPORTANT:** You don't have to address all of the concerns in the first question.
  - In fact, you may address almost none of these concerns directly, and many concerns may self-resolve over time as you put foundational habits in place.
  - Do **ONE** thing at a time, following what your client identifies as top priorities.
- For many people, this may be the first time they've shared these concerns. Be empathetic. It may feel overwhelming to them too.
- Reassure them, if needed, that you are here to help them find a path through the weeds, and that your action plan will involve a clear strategy to work through these concerns step by step.
- If you ever want to dig into exactly what trade-offs your client is willing to make, you can explore with them using the Want-Willing-Won't Worksheet.

**Out of all of the above concerns, which ones feel most important / urgent?**

1. ....
2. ....
3. ....

**Why?**

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**Coaching tips**

- These two questions above ask your client to start organizing their thoughts, and begin to define what is urgent / important / a priority for them.
- Asking why something feels most important / urgent helps to surface your client's values, perspective, motivations, and expectations.
  - Consider using the 5 Whys exercise if you'd like to learn more about your client's deeper motivations (outlined in Chapter 10).
  - Asking "why" can also help bring up any potential tensions or areas of resistance (e.g., "My doctor says I should change X, but I'm not sure if I agree."). When these tensions appear, explore them with motivational interviewing.
- If something seems urgent, ask more about expected timelines.
  - How quickly does the client need / want things to change?
  - Is there a deadline (e.g., an upcoming wedding, competition, or other specific event)?
- Ranking priorities can help later on when a client may want to switch goals or do several things at once.
  - "Back on [date], you said that goal X was the most important priority for you because reason Y. Is that still true? If so, then let's stay focused on that. If not, let's revisit what is a priority for you now."

## What do you expect?

**What do you expect from me as your coach?**

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**What are you prepared to do to work towards your goals?**

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**Coaching tips**

- Having clear expectations for both coach and client is essential.
- Identify and discuss any potential areas of ambiguity or misfit (e.g., client wants to be contacted daily, but you normally contact clients weekly).
- The second question not only clarifies what clients are bringing to the table, but emphasizes that the coaching relationship is largely about the client's responsibility. You can use this as a jumping-off point to talk about your role as a guide and facilitator, but not "the boss" or responsible for the client's participation.
- The second question here can open up a discussion about "ready, willing, and able".
  - Consider using the Ready, Willing, and Able Worksheet here if needed.



## What do you want to change?

**Have you tried anything in the past to change your habits, your health, your eating, and / or your body?**

If so, what?



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**Which of those things worked well for you?** (Even if you might not be doing it right now.)

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**Which of those things didn't work well for you?**

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### Coaching tips

- These questions help you learn more about a client's general history of health, eating and exercise, as well as how knowledgeable and / or competent they may be in these areas.
- These questions also offer some coaching opportunities.
- Testing the evidence: "How did those things work for you?"
  - This highlights that most fad diets / workouts are ultimately unsustainable. Admitting this can help a client "break" from previous unhealthy or unworkable options.
  - If previous things worked well, these can be "bright spots" and clues about what might help your client (e.g., "I was most consistent when...")
- Learning moments: "What did you learn from doing this?"
  - If the client is are focused on "what didn't work", this can reframe their experiences.
- Affirming the client's drive, courage, and grit: "What strikes me here is how many times you tried to change. Even though you didn't make as much progress as you wanted, you were still trying. That tells me you really want to move forward with this, and that you're courageous and persistent."
  - Here, you can reframe "failures" and highlight change potential by pointing out that despite setbacks, the client kept trying to find solutions.



**How, specifically, would you like your habits, your health, your eating, and / or your body to be different?**

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**Coaching tips**

- This question helps you learn more about and clarify what the client wants, and more precisely how they imagine change.
- This question also suggests possible progress indicators to use.
  - For example, if the client says, “I’d like to have more energy”, you can use energy levels as one measure of progress.

**Have you already made changes to your habits, your health, your eating, and / or your body recently?**

If so, what?



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**If you were to consider making further changes to your habits, your health, your eating, and / or your body, what might those be?**

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**Coaching tips**

- These questions help you and the client identify what actions may be priorities for the client; and / or what the client feels ready, willing, and able to do right now.
- Keeping the question open-ended and about the potential (“if you were to consider”) encourages the client to think about change, and to identify what they want to happen, without feeling too much resistance.
- These questions can help the client start to commit to a possible course of action, if they are ready, willing, and able to do so.
- Many clients have already started to make changes by the time they get coaching. Call this early change out, validate it, and look for “bright spots” that you can build on.
- If the client suggests several potential changes, talk with them further about which changes might feel most important, urgent, and / or possible, and why.



**Until now, what has blocked you or held you back from changing these things?**

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**Coaching tips**

- The client’s answer here will help you understand what forces are acting against change for the client.
  - What are their limiting factors?
  - What forces are “pushing back” against change?
- This question can also help you find out why the client is considering change now.
  - Why this, why now? Why not last month, or next month?
  - What happened to bring your client here now?
  - Given the forces acting against change, what propelled the client to act?
  - Often there is some significant, precipitating event (e.g., an injury, a medical diagnosis, a family member dying or getting sick). Knowing this can tell you more about the client’s motivation and drive.

**Right now, how would you rank your overall eating / nutrition habits?**

HORRIBLE (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) AWESOME!!!

**Why?**

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**Coaching tips**

- Clients often rate their eating / nutrition as better than it actually is. Thus, if the client scores 8 or lower, consider using the Eating Habits Questionnaire.
- If the client describes behavior that sounds like possible disordered eating / emotional eating, consider using Emotional Eating Journal as part of a coaching action plan.

**Are you regularly active in sports and / or exercise?**

(Y) (N)



**If so, approximately how many hours per week?**

- Fewer than 5 hours                       10-14                       20 or more  
 5-9     15-19

**Coaching tip**

If the client indicates 5 or more hours per week, consider using the Athletic Nutrition Needs Questionnaire.

**What types of sports and / or exercise do you typically do?**

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**Approximately how many hours a week do you do other types of physical activity?** (e.g., housework, walking to work or school, home repairs, moving around at work, gardening)

- Fewer than 5 hours                       10-14                       20 or more  
 5-9     15-19

**What other types of movement and / or activities do you do?**

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**Coaching tips**

- Look for a balance of activities, as well as between activity and rest, intensity and rejuvenation. Is your client getting enough variety and recovery?
  - For clients who want to lose weight or improve nutrient partitioning, look for opportunities to add daily-life activity, ideally by building on what they already do, for example:
    - “You mention you walk your daughter to school every day. I’m wondering whether you could take a slightly longer route home to give yourself a few extra minutes of walking?”
- Explore your client’s attitudes towards and expectations of sports, exercise, movement and activity, for example:
  - Are they having fun? Do they know how to play?
  - Does activity seem like a chore?
  - How hard are they driving themselves?
  - How consistent are they?
  - What are their expectations for their performance?
  - Do they expect exercise will help them lose weight? Is that expectation accurate?



## What's around you?

**Who lives with you?** Check all that apply.

- Spouse or partner(s)                       Child(ren)                       Other family  
 Roommate(s)                                       Pet(s)

**Do you have children?** If yes, how many and what are their ages?



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### Coaching tips

- Knowing about your client's household, relationship, and / or family situation will help you understand things like:
  - what roles they might play in relation to other people (e.g., caregiver, financial provider);
  - what other time and energy demands they might have (e.g., child care, elder care, stay-at-home parent vs. working outside the home);
  - who might be setting the agenda in the household (e.g., "I have to please my kids" or "I'm in charge of menu planning"); and / or
  - how much structure the household might have (e.g., student household with roommates vs. mature family with well-ordered routines).
- Knowing the specifics of your client's family situation will also allow you to relate to them as individuals (e.g., Client X is newly married, Client Y is starting a family, Client Z is a dog lover)

**Who does most of the grocery shopping in your household?** Check all that apply.

- Me     Roommate(s)                                       Other family (e.g. parent, grandparent, sibling, etc.)  
 Spouse or partner(s)                                       Child(ren)

**Who does most of the cooking in your household?** Check all that apply.

- Me     Roommate(s)                                       Other family  
 Spouse or partner(s)                                       Child(ren)

**Who decides on most of the menus / meal types in your household?** Check all that apply.

- Me     Roommate(s)                                       Other family  
 Spouse or partner(s)                                       Child(ren)

**Coaching tips**

- These questions can tell you more about:
  - your client's skill, knowledge and responsibility around shopping and food preparation; and
  - your client's ability to make choices (real or perceived).
- If any other people are doing the bulk of shopping, cooking, and / or food decisions, consider how to include them in your client's coaching program so that they are on board with any changes.
- If the client doesn't seem to have strong food preparation skills, or if the kitchen / home environment may be a limiting factor, consider using the Kitchen Set-up Assessment.

**Right now, how much do the people and things around you support health, fitness, and / or behavior change?**

NOT AT ALL (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) COMPLETELY

**Coaching tip**

If the client scores 7 or lower, consider using the Social Support Form and Kitchen Set-up Assessment.

**What's your health like?**

**Have you been diagnosed (currently or in the past) with any significant medical condition(s) and / or injuries?**

(Y) (N)

**Right now, do you have any specific health concerns, such as illnesses, pain, and / or injuries?**

(Y) (N)

**Right now, are you taking any medications, either over-the-counter or prescription?**

(Y) (N)

**Coaching tip**

If the client answer "yes" to any of these, consider using the Medical History and Present Medical Condition Questionnaire.

**On a scale of 1-10, how would you rank your health right now?**

WORST (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) AWESOME!!!

**Why?**

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.....

**Coaching tip**

If the client scores 7 or less, consider using the Medical History and Present Medical Condition Questionnaire.

**How are you spending your time?**

**In an average week, how many hours do you spend...**

..... In paid employment?	..... At school or doing school work?	..... Traveling and / or commuting?
..... Taking care of others? (e.g., children, person with a disability, older person)	..... Doing other unpaid work? (e.g., housework, errands)	..... Volunteering?

**Adding up all these things, how many total hours per week do you spend doing all these activities?**

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**Coaching tip**

Is this how many hours the client prefers to be spending on these activities? If they feels rushed / busy / time pressured, consider using the Planning & Time Use Worksheet.

**On a scale of 1-10, how do you feel about your schedule, time use, and overall busy-ness?**

MY LIFE IS PANICKED AND INSANE (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) MY LIFE IS PERFECTLY CALM AND RELAXED

**Coaching tip**

If the client scores 7 or lower, consider using the Planning & Time Use Worksheet as well as Stress and Recovery Questionnaire.



## How is your stress and recovery?

Think about all the activities you're involved in (e.g., work, school, caregiving, housework, travel). Then assess as best you can:

**Given all the demands of your life, what is your typical stress level on an average day?**

NO STRESS  1  2  3  4  5  6  7  8  9  10 EXTREME

### Coaching tip

If the client scores 4 or higher, consider using the Stress & Recovery Questionnaire.

**On average, how many hours per night do you sleep?**

- 4 or fewer hours
- 5 hours
- 6 hours
- 7 hours
- 8 hours
- 9 hours
- 10 or more hours

### Coaching tip

If the client sleeps 7 hours or fewer, consider using the Stress & Recovery Questionnaire.

**How do you normally cope with your stress?**

.....

.....

### Coaching tips

- Look for red flags here around coping and recovery methods, such as:
  - alcohol or other addictions;
  - eating (or not eating);
  - high stress levels; and / or
  - poor or no recovery methods.
- Consider using the Stress & Recovery Questionnaire if anything pops up.

## How ready, willing, and able are you to change?

Right now, on a scale of 1-10:

**How READY are you to change your behaviors and habits?**

NOT AT ALL (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) COMPLETELY

**How WILLING are you to change your behaviors and habits?**

NOT AT ALL (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) COMPLETELY

**How ABLE are you to change your behaviors and habits?**

NOT AT ALL (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) COMPLETELY

### Coaching tips

- If the client scores 7 or less, use Ready, Willing, and Able Worksheet.
- Consider also using the Limiting Factors, Advantages, and Behavior Goals Log as a next step.

## Disclaimer

Please recognize that it is your responsibility to work directly with your health care provider before, during, and after seeking nutrition and / or fitness consultation.

Any information provided is not to be followed without prior approval of your doctor. If you choose to use this information without such approval, you agree to accept full responsibility for your decision.

Client signature:

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