

Resume & Career Coaching Client Assessment

This form helps us understand your goals, experience, and priorities so we can tailor your resume strategy and coaching support to your next career move.

Welcome

Please share what you can. Your responses will guide a focused, personalized conversation with your coach.

1. Client Information

Prompt	Your response
Full name	_____
Preferred name	_____
Email	_____
Phone	_____
Location	_____
LinkedIn URL	_____
Preferred contact method	Email / Phone / Text / Video — select one: _____

2. Career Goals

Prompt	Your response
Target role or industry	
Ideal work environment	Examples: remote, hybrid, team size, pace, culture, leadership style.
Short-term goals	What would you like to accomplish in the next 3–6 months?
Long-term goals	What direction would you like your career to take?
Desired timeline	Target dates, milestones, or urgency:

Career focus

What would make this next step feel successful and meaningful to you?

3. Professional Background

4. Resume Assessment

Prompt	Your response
Current resume link or attachment note	Link or file name: _____
What is working?	What do you like about your current resume or what has received positive feedback? _____ _____
What needs improvement?	What feels unclear, outdated, repetitive, or difficult to explain? _____ _____
Roles being targeted	List the titles, levels, or job postings you want to pursue: _____ _____
ATS or keyword concerns	Any concerns about applicant tracking systems, keywords, formatting, or tailoring? _____ _____

Accomplishment Examples

Use measurable details where possible, such as revenue, time saved, growth, volume, quality, or team impact.

Situation or challenge	Action you took	Result	Measure
_____	_____	_____	_____
-	-	-	-
_____	_____	_____	_____
-	-	-	-
_____	_____	_____	_____
-	-	-	-

5. Coaching Assessment

Prompt	Your response
Biggest career challenges	What is currently making your search or career decision difficult? _____ _____
Interview or networking concerns	Where would you like more preparation, practice, or confidence? _____ _____
Confidence barriers	What doubts, fears, or patterns may be holding you back? _____ _____
Accountability preferences	How would you like to track progress and receive follow-up? _____ _____

Topics you want to cover

- ☐ Interview preparation and practice
- ☐ Networking strategy and outreach
- ☐ LinkedIn positioning and personal brand
- ☐ Job search strategy and targeting
- ☐ Confidence, mindset, and career clarity
- ☐ Salary negotiation or offer evaluation
- ☐ Other: _____

6. Service Preferences

Prompt	Your response
Preferred support	Resume-only / Coaching-only / Combined support – select one
Preferred session format	Video / Phone / In person / Flexible – select one
Availability	Preferred days, times, and time zone: _____ _____
Budget range	Preferred investment range for this support: _____
Additional preferences	Session frequency, communication style, accessibility needs, or other considerations: _____ _____

Best-fit support

What would you most value from working together?

7. Next Steps & Consent

Prompt	Your response
Immediate priorities	What should we address first? _____ _____
Questions for the coach	What would you like to ask before or during our first session? _____ _____

Acknowledgement

☐ I confirm that the information I have provided is accurate and may be used to prepare personalized resume and coaching recommendations.

Client name	_____
Signature	_____
Date	_____

Thank you for taking the time to complete this assessment. Your responses will help create a focused plan for your resume and career goals.