

Executive Self-Reflection Intake Form

Confidential – For Advisory Preparation Only

Section A: Current Context

- 1. What is your current role and primary responsibility?
- 2. What prompted you to seek advisory support at this stage?
- 3. What decision, transition, or situation feels most pressing?

Section B: Strategic Clarity (Rate 1–5)

- I am clear about my professional direction.
- My current role aligns with my long-term aspirations.
- I make high-stakes decisions with confidence.
- I feel strategically in control of my professional trajectory.

Section C: Emotional Stability Under Pressure (Rate 1–5)

- I manage stress effectively.
- I recover quickly from setbacks.
- I remain composed during conflict.
- I sleep well despite work demands.
- I experience minimal stress-related physical symptoms.

Section D: Leadership & Relational Dynamics

- Are there key relationships currently under strain?
- Do you feel isolated in decision-making?
- Is there a difficult conversation you are postponing?
- Do you feel recognised and valued in your current environment?

Section E: Energy & Sustainability

- What drains your energy most?

- What currently restores your energy?
- Are you operating in reactive mode or reflective mode?

Section F: Desired Outcomes

- What would success from this advisory engagement look like?
- What behavioural or strategic shifts do you hope to achieve?
- What is the cost of not addressing this issue now?