

# HLP Group

Powerful Systems for Business Building

HLP Group  
 17011 Beach Blvd. #900  
 Huntington Beach, CA 92647

Please complete this questionnaire and fax to 714-242-1754 to process your request for coaching.

## Contact Information

|          | Name | Date of Birth | Personal Email Address | Permission to Email?                               |
|----------|------|---------------|------------------------|--|
| Yourself |      |               |                        | <input type="radio"/> Yes <input type="radio"/> No |
| Spouse   |      |               |                        | <input type="radio"/> Yes <input type="radio"/> No |
| Address  |      | Phone Numbers | Fax Number             | Permission to Fax?                                 |
|          |      | Home          |                        | <input type="radio"/> Yes <input type="radio"/> No |
|          |      | Cell          |                        |  |

## Your Business

| Name                              | Date Began    | Industry Type | Business Email Address |                   | # Employees                        |
|-----------------------------------|---------------|---------------|------------------------|-------------------|------------------------------------|
|                                   |               |               |                        |                   |                                    |
| Type (Corp, Sole Proprietor, LLC) | Annual Volume | Attorney      | CPA                    | Financial Planner | Groups and Association Memberships |
|                                   | Current       | Name          | Name                   | Name              |                                    |
|                                   | Goal          | Phone         | Phone                  | Phone             |                                    |

## Your Situation

|  |   |  |  |  |
|--|---|--|--|--|
| What was your highest level of education attained?   | <input type="radio"/> High School <input type="radio"/> Graduate School (Masters)<br><input type="radio"/> College <input type="radio"/> PHD <input type="radio"/> Other  |  |  |  |
| Your Career Situation  | <input type="radio"/> Entrepreneur <input type="radio"/> Decision Making Executive<br><input type="radio"/> Sales Professional <input type="radio"/> Sales Manager <input type="radio"/> Manager<br><input type="radio"/> Other |  |  |  |
| Type of coaching you see for yourself  | <input type="radio"/> Life Coaching <input type="radio"/> Personal Coaching <input type="radio"/> Sales Coaching<br><input type="radio"/> Career Coaching <input type="radio"/> Business/Executive Coaching                     |  |  |  |
| Your Annual Income   | <input type="radio"/> \$100-250k <input type="radio"/> \$250-500k <input type="radio"/> \$1-2M <input type="radio"/> \$2M+  |  |  |  |
| Your Biggest Challenges  |   |  |  |  |
| <input type="radio"/> Staying Focused <input type="radio"/> Work/Life Balance <input type="radio"/> Delegation <input type="radio"/> Reactive vs. Proactive <input type="radio"/> Initiating the Sale<br><input type="radio"/> Keeping Organized <input type="radio"/> Hit a Plateau <input type="radio"/> Overwhelmed <input type="radio"/> Fear and Doubt <input type="radio"/> Closing<br><input type="radio"/> Listening and Communication <input type="radio"/> Managing Time Poorly <input type="radio"/> Commoditization <input type="radio"/> Confidence Levels<br><input type="radio"/> Accountability <input type="radio"/> Motivation <input type="radio"/> Team Performance Low <input type="radio"/> Landing Bigger Clients |   |  |  |  |

## Goals

|  |  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
|--|--|---|--------------------------------------|---|---|--|---|--|--|---|---------------------------------|---|--|--|---------------------------------------|--|---------------------------------------|
| <p>What are 3 Annual Goals you'd like to attain?</p>   | <p>1.</p> <p>2.</p> <p>3.</p>  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <p>To select an emphasis for your coaching program. What capabilities do you want coaching to provide you?</p> | <table border="0"> <tr> <td><input type="radio"/> Clarity and Direction</td> <td><input type="radio"/> Sounding Board</td> </tr> <tr> <td><input type="radio"/> Create an Auto Pilot Business</td> <td><input type="radio"/> Focusing your Strengths</td> </tr> <tr> <td><input type="radio"/> Leading a High Spirited Team</td> <td><input type="radio"/> Refine Sales Skills</td> </tr> <tr> <td><input type="radio"/> Create Work/Life Balance</td> <td><input type="radio"/> Simplify your Life</td> </tr> <tr> <td><input type="radio"/> Hire Top Performers</td> <td><input type="radio"/> Free Time</td> </tr> <tr> <td><input type="radio"/> Define Obstacles Better</td> <td><input type="radio"/> Develop Better Structure and Systems</td> </tr> <tr> <td><input type="radio"/> Create a Company worthy of others commitment</td> <td><input type="radio"/> Better Listener</td> </tr> <tr> <td></td> <td><input type="radio"/> Increase Income</td> </tr> </table> | <input type="radio"/> Clarity and Direction | <input type="radio"/> Sounding Board | <input type="radio"/> Create an Auto Pilot Business | <input type="radio"/> Focusing your Strengths | <input type="radio"/> Leading a High Spirited Team | <input type="radio"/> Refine Sales Skills | <input type="radio"/> Create Work/Life Balance | <input type="radio"/> Simplify your Life | <input type="radio"/> Hire Top Performers | <input type="radio"/> Free Time | <input type="radio"/> Define Obstacles Better | <input type="radio"/> Develop Better Structure and Systems | <input type="radio"/> Create a Company worthy of others commitment | <input type="radio"/> Better Listener |  | <input type="radio"/> Increase Income |
| <input type="radio"/> Clarity and Direction  | <input type="radio"/> Sounding Board   |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <input type="radio"/> Create an Auto Pilot Business  | <input type="radio"/> Focusing your Strengths  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <input type="radio"/> Leading a High Spirited Team   | <input type="radio"/> Refine Sales Skills  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <input type="radio"/> Create Work/Life Balance   | <input type="radio"/> Simplify your Life   |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <input type="radio"/> Hire Top Performers  | <input type="radio"/> Free Time  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <input type="radio"/> Define Obstacles Better  | <input type="radio"/> Develop Better Structure and Systems   |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <input type="radio"/> Create a Company worthy of others commitment   | <input type="radio"/> Better Listener  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
|  | <input type="radio"/> Increase Income  |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |
| <p>We set up a weekly routine coaching call. Please select the optimal time and day for you.</p>               | <p><input type="radio"/> Monday   <input type="radio"/> Tuesday   <input type="radio"/> Wednesday   <input type="radio"/> Thursday   <input type="radio"/> Friday</p> <p>Circle Best Time Slots   7 • 8 • 9 • 10 • 11 • 12 • 1 • 2 • 3 • 4 • 5</p>   |   |                                      |   |   |  |   |  |  |   |                                 |   |  |  |                                       |  |                                       |

## Coaching Plan

|  |  |
|--|--|
| <p><b>Coaching Packages</b><br/>We encourage our clients to make a serious commitment to their coaching program. When they make a significant financial commitment, they pay better attention and see better results. We've proposed coaching packages, that allow you the flexibility of completing 3-4 sessions per month over successive weeks at a routine call time. We ask you commit your funds and energies for a minimum of 180 days, recommended to 1-2 years, if you're really as serious as you say you are.</p> | <p><b>VIP Coaching (For Initial 6 Months):</b></p> <p>VIP 1 &lt;1st Class&gt; 24 Weekly , one hour sessions. 180 days<br/> <input type="radio"/> \$995 Mo.   <input type="radio"/> \$5495 PIF</p> <p>VIP 3 &lt;Popular&gt; 18 one hour sessions, weekly at 3 per month. 180 days<br/> <input type="radio"/> \$795 Mo.   <input type="radio"/> \$4495 PIF</p> <p><b>VIP's Optional After first 6 Months:</b></p> <p>VIP 4 &lt;Budget&gt; 18 (30) minute sessions, weekly at 3 per month. 180 days<br/> <input type="radio"/> \$495 Mo.   <input type="radio"/> \$2795 PIF</p> <p>VIP 2 &lt;Accelerated&gt; 24 weekly (30) minute sessions. 180 days<br/> <input type="radio"/> \$595 Mo.   <input type="radio"/> \$3295 PIF</p> |
| <p><b>Form of Payment</b><br/>We take all forms. Please complete the Credit Card Authorization Form if paying by credit card, in addition to the data required in the above box.</p>   | <p><input type="radio"/> Check</p> <p><input type="radio"/> Credit Card</p> <p>Number _____ exp _____</p>  |

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Date \_\_\_\_\_

## **Credit Card Authorization Form**

Account Name \_\_\_\_\_

Invoice Number \_\_\_\_\_

Paid In Full Amount \_\_\_\_\_ for \_\_\_\_\_ Months

Monthly Payment \_\_\_\_\_ for \_\_\_\_\_ Months

Credit Card Type \_\_\_\_\_

Credit Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

Card Holder Name \_\_\_\_\_

*I authorize HLP Group to charge the credit card listed above. I understand that the charge to the credit card is final and irrevocable.*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Print Name*

*Please sign and fax back to Cindy Gaffen at 714-242-1754. Thank you!*