



Intake Questionnaire for Weight Loss Clients

The following is a sample intake questionnaire I use for weight loss clients. I do not ask them to fill this out at all. These are questions to ask in person, on the spot, live, so you can gauge people's responses, and really feel them and hear them. I generally do not like fill-in forms. I learn much more by asking these same questions in the moment. People will give different answers when you ask them a question directly, personally and with curiosity. You can read from a sheet. You can improvise and go off on tangents as you go along...

1. Thanks for coming in! So, if you could wave your magic wand and get whatever you want in our work together, what would that be?
2. Schmooze a bit, be light, connect. You can say or ask things like "Wouldn't it be great if there was just some kind of magic pill to take us exactly where we want to go?" Or, "My guess is, if you're like most people, you've been trying to lose weight for a while. How long have you dieted for? When did you 1st start in life?"
3. Well, the most important thing I want you to know is that I really want to help you get where you want to go. And I will do everything in my bag of tricks to help get you there.
4. I'm going to spend some time asking you questions, and sometimes those questions may not seem sequential, or even perfectly relevant, but trust me there is a method to most of my madness.
5. After I am finished asking you questions, I'll give you some feedback and my thoughts about where I think you're at and how I would proceed if we were to continue to work together. Can that work for you?
6. How much do you weigh right now?
7. How much do you want to weigh?
8. So you want to lose xx number of pounds... is that correct?
9. When was the last time you weighed this amount?
10. Do you feel this is an honest and reasonable and doable goal?
11. (If not) – What would be a more reasonable and doable goal?
12. Are you on any kind of weight loss program right now?
13. You said you have been dieting for X amount of years – is that correct?
14. How have you tried to lose weight in the past? Can you give me some details about what diets you have followed and how the whole process has been for you?
15. What diet(s) has been most successful? Why did the weight come back from these successful diets?
16. Can you make any general guesses as to why YOU think you have this challenge with weight?
17. What do you honestly think will help you lose weight and keep it off?
18. Did your weight gain occur at a specific time in your life?
19. What else was going on at that time? (work, relationship, divorce, death in family, kids, health issue, break-up, finances....)
20. Are you on any medications?
21. Have other experts or practitioners diagnosed you? What do they think? What was their diagnosis?



22. Why do you want to lose weight?
23. What do you imagine will be different about your life when the weight is off and you have the body that you want?
24. Can you be more specific here?
25. So, when you did lose the weight in the past, and had the body you wanted, was your life indeed as you imagined it would be? (Are you sure?) So why did the weight come back if you had what you truly wanted?
26. How is the weight situation in your family – parents, siblings? Do they or did they have weight issues? Diabetes?
27. Are you married? In a relationship? How long? How's it going? What's good about the relationship? What would you say is challenging about it? Would you like to be in a relationship?
28. Do you have kids? Do you want kids? (Ask about kids)
29. How does your husband/wife/partner feel about your weight? Are they still attracted to you? Is it an issue for them? What advice do they give to you?
30. Do you enjoy food? What are your favorite foods? What's your favorite restaurant to go to? If you had only one day to live what would be your last meal?
31. Are you a fast, moderate or slow eater?
32. Tell me about work, what do you do? On a scale from 1 to 10 how much would you say you enjoy your job if 1 was the worst job in the world, and 10 was the biggest job orgasm?
33. If you had all the money in the world, what kind of work would you be doing? What would be different about your life?
34. How does your concern around weight affect your work life? Social life? Love life?
35. Where do you live? Do you enjoy living there? How long? What would be your ideal place to live?
36. Are your parents alive? Where do they live? How is your relationship with each? Have you forgiven them?
37. Other health issues or symptoms you experience? Digestion? Sleep? Energy level? Mood swings? Brain fog? Food allergies? Depression? How's your monthly cycle? How was your elimination? Do you get constipated? Are you satisfied with the quality of your hair and skin?
38. Are you under a doctor's care?
39. Have you had any thyroid issues, tests? Diabetes/insulin resistance tests?
40. Are you taking any supplements for weight loss?
41. Have you been treated for any conditions with steroid hormones?
42. Have you had chemotherapy before?
43. What do you do for exercise? Do you enjoy that? If everything burned the same amount of calories, what kind of movement or exercise would you do?
44. Do you know any overweight people – friends, relatives, partners, anyone - toward whom you feel truly fine about their weight with no need to change or fix them?
45. What could help you - other than losing weight or fat - love your body exactly as it is right now?
46. I'm going to ask you a personal question, so please feel free to not answer it, or answer it to whatever degree you feel comfortable. What's going on in your sex life? Meaning, how is it for you, do you have what you want, are you getting some, and in an ideal world what would be different?



47. What would your ideal relationship with food look and feel like?
48. What would your ideal relationship with your body look and feel like?
49. Dietary Intake – get all details of Everything they eat and drink – meals, snacks, beverages, times when eaten, how many times per week... take into account weekends, travel schedule, work schedule, on diet or off diet...
50. Explain to them the concept of the Divinity of symptoms... Then ask - What, to you, is the “gift” in excess weight? The whispering of the Divine? The message?
51. Explain the concept of excess weight = potential energy. Then ask - If excess weight is indeed potential energy – energy for creativity, self expression, withheld emotions, withheld love, etc. - what kind of potential energy might you personally be storing when you carry extra weight (now, or in the past)?
52. Explain the concept of feeling lighter by “lightening up”, using the mind body connection to lose weight by letting go of “heaviness” – then ask – where in life are the obvious places that you can lighten up?
53. You don’t need to ask all of these questions, but it would be great to do so simply for the practice in getting comfortable asking questions that you might not usually ask.
54. I generally like to do a 1st session that is 90 minutes long. The reason is, that I want to be able to talk story as much as possible during the 1st session to make a strong connection with my client and learn as much about them as I can. If not, 60 minutes is fine, but you may need to move things along in terms of all these questions that I’m asking you to ask.
55. In the last 20 - 30 minutes of the session, or approximately at that time, I take over the conversation and begin to offer my client my assessment, my thoughts, and some insights and specifics of how I would work with them moving forward. I am looking to let my client know that I know what I’m doing. I confidently assess them.
56. I let my client know that I really would love to work with them, and that I’m really inspired to help get them where they want to go. I tell them about my approach, why it is unique, that we will work in nutritional and personal realms, and that I love the work that I do. I’ll do everything that I can to give them their money’s worth.
57. So, based on everything you have told me, Mr. Client, here’s what I see going on: you’ve tried all kinds of diets to lose weight and whenever you lose the weight it comes right back on. You’ve made some very sincere efforts. I applaud you. But the diets and the exercise that you have been doing clearly are not sustainable. I notice that you’re very low in healthy fat and that you think this is a good thing. I also notice that when you eat very low calorie, you end up binge eating at night. You either follow a very low-calorie diet, or you cut loose. We will find a diet for you that’s totally doable and works. You also told me you’re a very fast eater. (Explain eating and stress response) I also notice that you starve yourself during the day and eat the majority of your calories at night. We need to work on this. The bottom line is we have some great places to work. I’d want to see you once per week for 6 straight weeks and then twice per month for about 3 to 4 months after that. From there, we’ll see how you’re doing, and we’ll renegotiate. So, are you on board?



58. I always like to give homework assignments after virtually every session. This is extremely important. It keeps the action going. It gives your client practical ways to work. It gives you and your client an opportunity to measure progress. Please learn to invent appropriate homework assignments for each client and for each session.
59. For the 1st handful of sessions with a weight loss client, homework assignments should be very practical and targeted. You should have 1 or 2 homework assignments to give at the end of the 1st session that are relevant, and have the greatest probability to give the best bang for the buck in terms of giving your client a small success.
60. This homework assignment at the end of the 1st session could be:
- Working with eating rhythm.
 - Working with macronutrient balance.
 - Working with slow eating.
 - De-stressing while eating.
 - Cutting down on intense amounts of sugar or caffeine.
61. Remember to make sure to engage your client in giving full, complete, useful, and honest answers. If your client is being evasive or quiet, it's your job to bring them out. If a client is being especially difficult in this way, I will say to them directly, and perhaps in a lighthearted way that I need them to be more talkative. I might say to my client, "Listen, I need you to pretend that you and I are 2 teenage girls that cannot help but yak and yak. In other words, I need you to tell me more stuff."
62. Remember - the intake session is not about your client giving you a bunch of facts that you collect from them. Yes, you need information, and you'll get it, but the questions you ask are as important for your client to hear their own answers as they are for you to hear the answers.
63. The 1st session can be a very magical experience. It's easy to get nervous. It's okay. Don't beat yourself up. Breathe through your nervousness. Find a place of curiosity about your client. Curiosity will help you relax. Let go of trying to figure out your client. Let go of trying to fix your client. Simply let the magic of questioning, and listening for answers, reveal their own wisdom to you. Your practice is to listen. Your practice is to listen in a relaxed way. Trust in the higher wisdom of the relationship. From here, insights will surely come.
64. After the session, go over your notes. Write more notes. Write down all of your insights. Write down your questions.







