

The application of: The PMA Intake Level Form & The Personal Growth Form

In personal 1-on-1 PMA coaching, we use the "*PMA Intake Level Form*" and the "*Personal Growth Form*." Both forms contain statements about various important areas of life.

What is the difference between these two forms?

The *PMA Intake Level Form* is filled out only once, shortly before the start of the first session, while the *Personal Growth Form* needs to be filled out multiple times thereafter.

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1. What is the PMA Intake Level Form?

This form is to be filled out by your client **once**, prior to the first session. It indicates where your client stands on each of the life areas before starting PMA. People often forget how unpleasant they felt once their symptoms have been resolved. At that point, you can use this form to show them their original **starting point**. The PMA Intake Level Form can be accessed via the following link: http://feedback.pmainstitute.com/?id=2_1&hl=en

You will send each client an email requesting them to fill out their Intake Level Form as honestly and objectively as possible online, based on their own feelings and observations. Your email to them will include the link to the website where they can fill out the form, along with a code number assigned by you. (At the bottom of this document, you will find a suggestion for the email text you could send to them and how to create the client code.)

2. What is the Personal Growth Form?

This is the follow-up to the first form. The *Personal Growth Form* assists your clients in indicating the extent of their **personal development** in each of the life areas at any given time and can be filled out **multiple** times. It will consistently show you where their biggest blockages still exist.

The *Personal Growth Form* is not listed in the menu of our website but can be accessed through the following link: http://feedback.pmainstitute.com/?id=3_1&hl=en

3. How to use the Forms

After a client has scheduled their first appointment with you, you send them an email requesting them to fill out the *Intake Level Form* online based on their own feelings and observations. Your email to them includes the link to the website where they can complete the form, along with a unique code number assigned to them.

(Below is a suggestion for the email text you could send to them and how to generate this client code.)

Their completed *Intake Level Form* gives you an immediate and clear overview of your client's issues. You already have an understanding of the areas of concern and where the greatest potential for growth lies.

After sending the *Intake Level Form* **once**, a day after their initial personal session, the client is requested to complete the online **Personal Growth Form** using the same unique code you provided them to fill out the *PMA Intake Level Form*.

(Website link for the personal growth form: http://feedback.pmainstitute.com/?id=3_1&hl=en)

After a duration of six weeks, as their coach, a subsequent request is made for them to diligently complete their *Personal Growth Form* once again.

Note: The number of times you ask them to fill out the Personal Growth Form, after they fill out **one** Intake Level Form and **two** Personal Growth Forms, may vary for each client and is left to your personal judgment.

Neither the *Intake Level Form* nor the *Personal Growth Form* require clients to enter their name or address. They only need to fill in their assigned code and your name as their PMA coach. Since you have given them this code, only you will know who they are. Once the form is fully completed by the client, you will automatically receive a copy via email, allowing you to work with it during their session.

We will show you in this document how to generate these client codes and provide you with suggestions for the email texts you can send to them to minimize your time and effort.

4. Usage in PMA coaching sessions.

Step 1: Prior to their first session, you will send your client an email containing two important pieces of information:

1. The website link to the *Intake Level Form*.
2. Their personal code number to access and fill out their *Intake Level Form*.

The completed forms are processed by a computer system, and the data is automatically emailed to you.

If, by any chance, the client does not have access to a computer or the internet, they can complete the form in your practice on your computer. In this case, you will have their data readily available for the start of a session.

By utilizing the data from the *Intake Level Form* (and subsequently, their *Personal Growth Form*), you are able to address their individual problems and desires directly and purposefully. The scores they assign themselves on each statement in the completed form provide you with precise information about the issues they are currently facing. By approaching the sessions in this manner, the intended goal for the client becomes more tangible, and the effects and progress of their development are better documented. Moreover, this approach allows you to establish a more regular and stronger connection with your clients. Additionally, the client is less likely to forget the impact PMA has had on them, as their progress is now quantified with scores for each topic.

IMPORTANT

Step 2:

A day after their initial personal session, the client is requested to complete the online ***Personal Growth Form*** using the same unique code you provided them to fill out the *PMA Intake Level Form*.

(Website link for the personal growth form: http://feedback.pmainstitute.com/?id=3_1&hl=en)

After a duration of six weeks, as their coach, a subsequent request is made for them to diligently complete their *Personal Growth Form* once again.

Note: The number of times you ask them to fill out the Personal Growth Form, *after they fill out one Intake Level Form and two Personal Growth Forms*, may vary for each client and is left to your personal judgment.

5. What to do with existing coaching clients?

For clients with whom you have been conducting regular coaching sessions for some time, you no longer use the *Intake Level Form*, but the *Personal Growth Form*. It is used with these

clients in exactly the same way. It will provide a fresh motivation to long-term sessions. (Below is a suggestion for the email text you could send to them.)

6. Continued contact after a session

Their previously completed *Personal Growth Form* provides an ideal opportunity to stay in touch with your clients by occasionally reaching out and asking how they are doing. You can inquire about specific areas where they gave themselves low scores, as your aim is to further assist their growth. By utilizing the *Personal Growth Form* in this manner, they are more likely to take the step of scheduling a follow-up appointment.

The *Personal Growth Form* can also be used with clients who have never filled out such a form before. You can contact them by phone in advance and ask if they agree to receive an email from you with a code and a request to complete the online *Personal Growth Form*. This is particularly applicable to clients with whom you haven't spoken for an extended period. During this contact, you have the opportunity to inquire about their well-being and progress.

Clients not only appreciate this type of contact as personal attention, but it also serves as a reminder that there is an effective way to make progress. This applies to areas that have already improved as well as areas that scored low on their list. By using this approach, you help them overcome the resistance caused by their friend mechanism, and they are more likely to schedule a one-on-one session. While this approach is effective in securing sessions, it is not primarily offered to generate more work. It is done to provide them with the optimal assistance they need.

7. Automated delivery

After your clients fill out the lists, they are automatically processed and sent to you. This means that even if your client fills out the online list in your practice, you can immediately start working with it since you receive the completed list through the computer system that processes it.

8. The client does not receive a copy

The client does not receive a copy of the list they filled out via email. We want to avoid influencing the objectivity of the client when they fill out the *Personal Growth Form* repeatedly. The intention is for the client to spontaneously fill out the form each time you send it, without any reference to previously completed lists. You, as the PMA coach, are the only one who receives the lists.

9. Admin System

Suggestion for creating the code for your client, the code list in Excel, and your personal admin system.

To ensure the privacy and anonymity of the client, the code should be created by you. The PMA Institute will not know the identity behind the code. However, it is important to prevent the occurrence of duplicate codes for different clients. To address this, we suggest creating the codes using the following method:

Your initials (2)

De client's initials (2)

Three random numbers (3)

Example: PMA Coach: Jackson Clark
Client: Ann Stewart
→ Code: JCAS598

You provide this code to the client for use on the *PMA Intake Level Form* and the *Personal Growth Form*. Note the code on their client record. Additionally, create a complete list of all codes + names for your own reference, making it easy to retrieve. We recommend being diligent in this process, as we will not be able to later verify the client's code and the corresponding name.

To make this as easy as possible for you, there is an example of such a list in Excel (*named Growth Form – Code List*) available on the download page for coaches on our website. In this list, you can include the client's name, the code you assigned to them, and the dates on which you sent or will send the *Intake Level Form* and subsequent *Personal Growth Forms*.

SUGGESTIONS!

At the bottom of this document, you will find some examples of emails to send to your clients. When providing the links to both forms for them to fill out.

For the *Intake Level Form*:

http://feedback.pmainstitute.com/?id=2_1&hl=en

For the *Personal Growth Form*:

http://feedback.pmainstitute.com/?id=3_1&hl=en

IMPORTANT!

When a client transitions from another PMA Coach to you, they are considered new to you. As such, you will assign a new code to that client. They will begin by filling out an *Intake Level Form*, followed by the *Personal Growth Forms*.

10. Examples of emails to your clients

We provide several examples of email texts that you can send to different target groups. Of course, you are free to customize them or create your own emails. These examples are solely intended to make it as easy as possible for you.

Also, pay specific attention to the group described in email 4: PMA clients who haven't had a session in a while. Experience has shown that at least 50% of them would like to have another session, but they just need a little extra attention to overcome the resistance caused by their friend mechanism. Take a look in your files for the contact information of clients you haven't seen in a while.

Suggestions for email texts from you to your clients.

- 1) Prior to their first session (regarding the *Intake Level Form*)
- 2) A day after their first PMA session (regarding the *Personal Growth Form* – one day after their session and six weeks later after their first session)
- 3) Six weeks after their first session
- 4) For clients who haven't had sessions in a while and have never filled out an Intake Form or a Personal Growth Form
- 5) For clients who have already filled out the Personal Growth Form one or more times.

1: Prior to the first session

Dear [Client's Name],

I am writing to confirm our appointment on [date/time]. To ensure an effective and efficient session, I kindly request that you complete the online Intake Level Form.

The form consists of statements covering various aspects of life. By assigning a score to each statement based on your own perception, you will gain valuable insights into the areas that are important to address during our upcoming session. You can access the form at: http://feedback.pmainstitute.com/?id=2_1&hl=en

Rest assured that the information you provide will remain confidential and unidentifiable to others. As your PMA coach, I will assign you a unique code number that is known only to me. Therefore, there is no need to include your name, address, or other personal details on the Intake Level Form.

Note: Your personal code number for this online form is: *to be filled in by the coach, a minimum of 7 characters*. **Please keep this code safe. It is your unique code that you will need in the future as well.**

Moving forward, you will receive similar lists to track your progress and development. The information you provide will be securely processed within the computer system at the PMA Institute and forwarded to me automatically.

I am looking forward to our first session and working together towards your personal growth.

Best regards,
[Your Name]

2. A day after their first PMA session

Dear [Client's Name],

How do you feel after your first PMA session has settled in? I would like to closely track your progress. As explained, the *Intake Level Form* is a highly effective tool for structured work on the areas where you want to make improvements.

As a follow-up to the *Intake Level Form* you have already completed, I would like to ask you to fill out the *Personal Growth Form*.

As you may have noticed last time, you do not receive a copy of the completed list. We do this to maintain objectivity in the completion process. The values you are about to enter cannot be compared to the previous list. If you happened to have copied them before submitting, I would kindly ask you not to use them as a reference.

Instead, please fill out the new list spontaneously, based on how you currently perceive your progress.

You can find your Personal Growth Form at:
http://feedback.pmainstitute.com/?id=3_1&hl=en

Just to be sure, here is your personal code number for this online form: **to be filled in by the coach. Use the code that has already been assigned to you for this client.** Please keep this code safe. It is your unique code that you will need again in the future.

Please feel free to reach out if you have any questions or need assistance. I am looking forward to seeing your progress and our next session.

Best Regards,

[Your Name]

3. Six weeks after their first session

Dear **name client**,

Now that you have undergone a session, I would like to kindly ask you to fill out the online *Personal Growth Form* once again.

The scores you provide will provide a valuable insight into the areas where you have experienced growth and will also highlight areas that may still require attention in order to further enhance your progress.

You can find your form at: http://feedback.pmainstitute.com/?id=3_1&hl=en

Just to be sure, here is your personal code number for this online form: **to be filled in by the coach. Use the code that has already been assigned to you for this client.** Please keep this code safe. It is your unique code that you will need again in the future.

The information you provide will be securely processed within the computer system at the PMA Institute and forwarded to me automatically.

I am looking forward to receiving your completed Personal Growth Form.

Best regards,

[Your Name]

4. For clients who haven't had sessions in a while and have never filled out an Intake Form or a Personal Growth Form

Dear [Client's Name],

It has been quite some time since we last had a PMA session. How have you been? Are you still experiencing the benefits of the PMA sessions, or have new issues emerged in the meantime?

As you know, every bad cluster that you have cleared during the sessions remains free from its negative charge permanently.

However, there might be other dormant bad clusters present that, once activated, could lead to the recurrence of certain symptoms or behavioral patterns. You have already experienced how easily these can be overcome by applying PMA techniques.

I would like to take this opportunity to remind you about the online *Intake Level Form* and the *Personal Growth form*. These tools provide you with the opportunity to systematically take the next step in your personal growth process.

The online *Intake Level Form* consists of statements related to the most common areas of life. By assigning a rating to yourself for each of these areas, you gain a clear understanding of the areas that you consider most important to work on during the PMA session.

You can review your list at your convenience by visiting:

http://feedback.pmainstitute.com/?id=2_1&hl=en

The information you provide cannot be linked to you by others. I will provide you with an exclusive code number. This number is only known to me, and I am the only one who knows which client it corresponds to. Therefore, you do not need to provide your name, address, or any other personal identifying information on the *Intake Level Form*.

The information you provide will be securely processed within the computer system at the PMA Institute and forwarded to me automatically.

Note: If you are considering using this service, your personal code number for this online form is: **to be filled in by the coach, a minimum of 7 characters.** Please keep this code safe. It is your unique code that you will need in the future as well.

If you wish, we can schedule a new appointment to work together on the areas that are most important to you, as indicated in the *Intake Level Form*.

I look forward to hearing from you.

Kind regards,

[Your Name]

5. Clients who have already filled out the Personal Growth Form one or more times.

Dear **Name Client**,

You have previously completed the Personal Growth Form. In order to provide you with the most optimal guidance, I kindly request you to fill out the Personal Growth Form as the next step.

Here is your personal code number for this online form: **to be filled in by the coach. Use the code that has already been assigned to you for this client.** Please keep this code safe. It is your unique code that you will need again in the future.

You can find your form at:

http://feedback.pmainstitute.com/?id=3_1&hl=en

I am looking forward to receiving your completed Personal Growth Form. Please feel free to reach out if you have any questions or need assistance.

[Your Name]