

# DEXTRAZE VENTURES

## Client Onboarding & Trajectory Audit

*Program: 12-Week Foundational Performance Blueprint*

Instructions: Please complete this intake prior to our initial 90-minute Onboarding Strategy Session. Your answers establish your starting baseline across our primary performance pillars, helping us eliminate drift from Day 1.

### SECTION 1: GENERAL PROFILE & PRIMARY OBJECTIVES

#### 1. Basic Information

Full Name:

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Age / Occupation:

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Current Role / Business Concept:

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Preferred Contact Method & Hours:

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#### 2. The Catalyst

What specifically made you decide to seek coaching right now rather than 6 months ago or 6 months from now?

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On a scale of 1-10, how clear is your direction for the next 3 to 5 years? Briefly explain why.

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What are the top 3 non-negotiable outcomes you must achieve by the end of our 12 weeks together?

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## SECTION 2: BUSINESS, CAREER & STRATEGIC DIRECTION

### 1. Current Professional Status

Describe your primary business, project, or career role in 2-3 sentences.

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What is your biggest operational bottleneck or growth blocker right now?

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### 2. Professional Goals

What specific financial, operational, or career targets are you aiming for over the next 12 months?

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Where do you waste the most professional energy or time during a typical workweek?

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## SECTION 3: PERSONAL FINANCES & CAPITAL ALLOCATION

## 1. Financial Baseline

Do you currently track your income, expenses, and net worth on a regular basis? (Yes / No / Inconsistently)

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On a scale of 1-10, how organized and stress-free are your personal finances?

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## 2. Capital Efficiency

What is your biggest financial leak or bad spending habit right now?

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What is your primary financial objective over the next 90 days? (e.g., emergency fund, eliminating debt, automating investments, increasing business cash flow)

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# SECTION 4: PHYSICAL ENGINE, FITNESS & ENERGY

## 1. Current Physical Habits

Describe your current exercise routine (frequency, type, intensity).

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Do you currently track nutrition, protein targets, or daily meal structure? Describe your typical daily nutrition.

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How many hours of quality sleep do you average per night?

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## 2. Vitality & Bio-Feedback

On a scale of 1-10, rate your overall daily energy level. When is your biggest energy crash?

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What physical or fitness goals do you want to hit during this 12-week blueprint?

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## SECTION 5: EFFICIENCY, PRODUCTIVITY & DAILY SYSTEMS

### 1. Time Management Architecture

Do you use a structured daily system, calendar, or habit tracker? What works or fails with your current setup?

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How many hours/day do you spend in deep, distraction-free execution vs. reactive firefighting/distractions?

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### 2. Personal Operating System

What does your current morning and evening routine look like (if any)?

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What single bad habit, if eliminated, would immediately upgrade your productivity?

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## SECTION 6: MINDSET, WELL-BEING & ACCOUNTABILITY

### 1. Stress & Environment

What is currently your single largest source of background stress or anxiety?

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Does your current physical and social environment support or hinder your growth ambitions?

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### 2. Coaching Expectations

How do you respond best to accountability? (direct candid feedback, structured data tracking, gentle encouragement)

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Are you prepared to dedicate 3-5 hours per week toward executing your strategy outside of our live calls? (Yes / No)

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*Thank you for completing your Trajectory Audit. Please submit this document at least 24 hours before our initial 90-minute Onboarding Strategy Session.*