

## Case Study Form

Please use the following outline to develop your case study.

Your name, email address, telephone number and the Real Balance class your attended (dates & webinar or dates & location).

**Description of the Client.** Consider:

- Age
- Family and other relationships
- Job and its effect on the person
- How did the person come to coaching?
- What support systems does the person have?
- What is the presenting problem or why the person began coaching?
- What are any health and wellness concerns?

**I. Describe the ways you went about *Setting the Coaching Foundation & Creating the Alliance* with your client. Include:**

1. Meeting ethical guidelines and professional standards as set forth by the National Board for Health and Wellness Coaching (NBHWC) that can be found at: [www.nbhwc.org](http://www.nbhwc.org)
2. How you went about conducting the Foundation Session and establishing agreements with your client; i.e. using the **Welcome Packet** or something similar to learn about your client.
3. Describe what you did to Co-Create the relationship with your client.

**II. Describe the ways you went about *Setting the Wellness Foundation* with your client.**

1. How you gained awareness your client's wellness concerns.
2. How you gained awareness of any medical/health concerns.
3. How you gained awareness of any medications, treatments or other forms of current health care.
4. How you gained awareness of the lifestyle prescription from the treatment team.

**III. Describe the ways you went about *Facilitating Learning and Results – Designing the Integrated Plan* with your client.**

Describe:

1. How you co-created the **Well Life Vision** with your client.
2. How you co-created the **Integrated Wellness Plan** and assessed **Readiness for Change** with your client. The **Case Study Plan chart** may be referenced here.
3. What tools you used to facilitate identification and development of the above.

**IV. Describe the ways you went about *Facilitating Learning and Results – Establishing Accountability, Exploring Support, Evaluating and Identifying Outcomes*. Consider:**

1. How you built accountability into the wellness plan.
2. How you assisted the client in being accountable to themselves.
3. Exploration regarding support.
4. If and how you evaluated with the client their experience at the end of the six sessions.
5. How you identified outcomes with the client.

**V. Describe the ways in which you *Communicated Effectively* with your client. Consider:**

1. Active listening skills you used.
2. How you used powerful questions.
3. How you integrated switching hats, making suggestions, or education, if applicable. Examples enhance the reviewer's ability to assess how you used these skills.

**VI. Describe the ways in which you *Facilitated Opportunities for Learning & Forward Movement*.** Consider:

1. How you helped your client to gain awareness.
2. If you addressed negative self-talk.
3. How you facilitated your client stretching themselves.
4. How you used additional tools of exploration.

**VII. As our clients learn from us, we also learn from them. What insights have you gained through the experience of working with your client in this case study?** Consider:

1. Your own self-observation - how you stretched as a coach.
2. What you learned through coaching that reinforced classroom learning or surprised you.
3. What insights and key learnings did you gain about yourself personally and professionally?