Example Of A written Case Study

For the Accredited Certificate in Coach Training, you can either complete a written case study, similar to this example, or you can complete a personal coaching approach (see example). You do not need to do both.

Initial contact

When Jx first got in contact they wanted to find out more about 1-1 coaching. They explained they already had a therapist and gave an overview of what they had been working on with that therapist. They have 2 children, both of whom experience the world differently. They are starting to identify their own experiences, and their partner's experience, that may be neurodivergent and would like to understand how they can support themselves and their family better. I forwarded them the following documents:

- CS4U coaching principles
- Global Code of Ethics
- Pre-coaching questions

They filled in their questions a couple of days before our first session, giving quite a bit of detail about their family and the challenges they were experiencing. They also mentioned how things might need to be adapted depending on the needs of their family. (AC 1.1, 1.2, 1.3, 1.4, 1.5, 3.1, 8.1)

First session

We talked about what coaching is and what it isn't, how it can work alongside therapy, the boundaries of working with me, such as my preference for using the coactive coaching approach (Whitworth et al, 2007) and interspercing it with other models such as Clean Coaching (x, 2000). Please see refection x for more detail on the approach I took to setting up our coaching relationship. (AC 1.6, 2.1, 2.2)

We looked through the pre-coaching questions. I asked what she noticed. She gave more detail having had a chance to reflect on the questions. She was able to identify her own feels and showed some understanding of the feelings of others in her family, along with some understanding of connection and how inner child healing may be helpful. I confirmed with her how much she already knew and how hard she must have been working over a number of years to develop this level of understanding. (AC 3.2, 4.1, 8.3)

We identified a starting point for the coaching: understanding what she has control over and what she doesn't, so that she can focus her limited spare time more effectively. (AC 4.1, 4.2, 8.1)

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We went through the contract (see document x) and agreed number of sessions, cost, location, how we would work together in between sessions and when we would review. As she was not sure about her own sensory needs, or the needs of her family, she took a questionnaire away with her to reflect on before our next session. We also discussed confidentiality and how that would be maintained throughout the coaching programme. (AC 2.3, 2.4, 3.1, 3.6, 4.1, 5.5, 7.2)

I asked how I could support her more effectively the next time. She said she would like me to give her more regular time check ins so that she is aware of how much of the session she has used and how much she has left. We agreed I would let her know every 15 mins and see how that felt. (AC 5.3, 8.4, 8.6, 8.7)

Second session

She had completed the sensory questionnaire for herself and for one of her children. It had given her quite a bit of insight into what was adding to her sense of stress. We explored different possible options to identify the feelings, reduce the feeling of overwhelm and be able to confidently speak her truth about her experiences. She wrote down key things she wanted to do differently. She also noticed some routines that were impacting her relationship with her child, that she could adapt. (AC 5.1, 7.1, 7.3)

I noticed that her list of things she wanted to tackle was getting quite long, and as we had agreed weekly sessions, I expressed I was concerned that she may not be able to implement all the aspects we talked about. She identified one thing that she would prioritise to completing, and several other things that would be nice if she had time, but were not essential. (AC 4.1, 4.3, 4.5, 5.4, 6.4, 7.3)

I checked in to find out if she still wanted to spend a bit of time on being able to work out what she has influence over and what she doesn't. She confirmed she did want to do that. We used the circle of influence and circle of concern worksheet adapted from FranklinCovey (2024) to explore the areas of her life she does have control over and the areas she doesn't. She did struggle to accept the limits of her influence over her children, and yet it actually felt like a relief to her to understand and appreciate that not everything is actually her responsibility. (see reflection sheet x for more details on the questions I asked) (AC 3.3, 3.4, 4.2, 5.1, 7.1, 8.1, 9.2)

We confirmed her action points and agreed our meeting for the following week. I asked how the time checks had gone this time. She said she was pleased we had done that as she felt more aware of how much time she had spent on things. I asked if there was anything else I could do differently to support her more effectively next time. She said she would like to spend a bit of time on her anger. (AC 4.3, 8.4, 8.6, 8.7, 9.1)

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Session 3

Things had changed a lot for the coachee since our previous session. We agreed early on in the session that the majority of the session would be listening as she wanted space to offload and connect with her feelings. Her best friend had been diagnosed with a life limiting illness and this has hit the whole family hard. This friend is a considerable support system for the coachee in a number of ways, including childcare and emotional support. The coachee's husband has gone into shock and has withdrawn from the family at a time when the coachee needs his support more than ever. The children are experiencing difficulties, even though they are not fully aware of the situation. The coachee talked about her emotions spilling over to anger a number of times and being very upset about that – not wanting to repeat family patterns. (AC 3.3, 3.4, 4.3, 5.1)

We revisited circle of influence, reminding ourselves what she does have control over. We discussed emotional set points, and how we can lower our set point then we are less likely to spill over into anger or upset. We talked about different strategies she could use to lower her set point for 5 mins every few hours, and how that would add up to over 3 hours in the course of the week. She identified a couple she would like to try and we unpicked her limiting belief about not being able to do anything when her child was around using Byron Katie's 4 questions (Katie, 2024). We also explored other supportive people who could become more consistent in her life, in terms of emotional and practical support, as she will need this more than ever over coming months. (AC 6.1, 6.2, 6.3, 7.1, 7.4, 8.2)

My personal integrity is really important to me. I want to act professionally, with the needs and interests of the coachee at the heart of the process. It is also important that I act honestly and openly, in line with my values and priorities. For this to be possible I have to understand my own values and also be able to communicate them with coachees. Part of being true to myself, is being able to share my own personal experiences, only when doing so would be of value to the coachee. This can be challenging for me, and potentially for them, as I have had a set of challenging experiences with my children, including bereavement, neurodivergence, cancer and anorexia. I decided to share a little of my story and experiences, as part of my observational feedback to support her process. (see reflection x for more detail) I also need to be clear when I disagree with a client, to avoid colluding with them. I do not want to support actions that could be self-destructive or unethical. (see reflection x for more detail) (AC 3.5, 4.4, 5.4, 6.4, 6.5)

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While this is clearly a challenging time for her, she went away looking a little better, a little more relaxed, a little more in control and ready to take a step forward. I asked her perspective on how she now felt, and she confirmed she felt more positive despite the challenging situation. We agree to meet fortnightly instead of weekly as agreed at our original contracting meeting due to the change in circumstances. (AC 3.2, 3.3, 5.2, 8.4, 8.6, 9.1)

Session 4

We started with a review of our previous sessions: what had worked well, what had not gone so well and what we could do differently to make the sessions even more effective for her. She appreciated the different tools we have used, and has been able to use them in different situations at home. She has put the circle of influence on the inside of her cupboard door. She has felt overwhelmed with the number of tasks she has set herself and then felt like a failure for not getting them done. We unpicked some limiting beliefs, exploring her current context, the challenges she is experiencing, and how it makes sense things would feel overwhelming at the moment. (see reflection x for more detail on the questions I asked and approach I took.) (AC 9.2)

I asked about what she would like to focus on for this session. She said she would like to explore her anger more, as it is coming up quite a bit at the moment, and she wanted to rid herself of it. I explained that my approach is befriending rather than eliminating as there can be useful parts of ourselves that can be in overdrive when we are overwhelmed I referenced Internal Family Systems and the work of Richard Schwart (2024) . I used a Clean Coaching approach (Clean Coaching, 2024, p88 onwards) to help her explore what it felt like, what happened just before, what happened after and how to create a better relationship with her anger. We went on to discuss a character that could personify the anger. We discussed different options and the anger character from the film Inside Out, felt the most relevant to her. (AC 5.5, 7.5)

The coachee confirmed that exploring anger from these different perspectives had given her more awareness of how it was impacting her life, and what she could do about it. She is going to explore some healthy ways to express her anger before our next session. (AC 8.4)

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Session 5
This is our final session together. We reviewed the actions she has been able to complete and the actions that are still outstanding. We reviewed the priority of each of the outstanding actions, and put some of them into the future, to be actioned in 6 months' time. She has a clear plan of what she would like to do, and by when, and feels this is achievable. She also has some contingencies, in terms of people who may be able to help if she does not complete them. (AC 8.5, 8.6)

We explored the impact the coaching has had on her as an individual, what she has learned about herself and how she is able to redirect her anger in different ways, including the new punch bag in her garden. We explored how her own level of regulation has had a positive impact on her children, and how different their experiences are to her experiences as a child, highlighting how much she has been learning over the past few years about aware parenting.

We discussed how the process had worked, including how confidentiality had been maintained. The coachee gave positive feedback and felt comfortable with the approach used and the way information had been shared. (AC 3.6, 9.1)

We explored the positive impact the coaching has had on her relationship with her husband, and what still needs to happen to support their connection. We also explored how the coaching has impacted her ability to talk with professionals outside the family, about their situation, and she has more confidence now than she had previously. (AC 8.3)
Please see Evaluation Form x for more details on the evaluation of the coaching programme and coaching diary x and x for my reflection on this and other sessions. I use the coaching diaries to critically reflect on my coaching practice, exploring how I have implemented new approaches into my sessions, as a result of that critical reflection and feedback from clients. (AC 8.4, 8.7, 9.2, 9.3)

Please see my supervision notes for details relating to a couple of these sessions that I found more challenging. (AC 9.4)
Please see my action plan which gives an overview of CPD I have undertaken and CDP I plan to take, in order to improve my coaching knowledge and experience. (AC 9.5)

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1 Whitworth et al (2007) Coactive Coaching: New skills for coaching people towards success in work and life CA,USA: Davies-Black Publishing
2 Dunbar, A (2017) Clean coaching: The insider guide to making change happen Oxen, UK: Routledge
3 Adapted from FranklinCovey (2024) Habit 1: Be Proactive Available at: https://www.franklincovey.com/the-7-habits/habit-1/ Date accessed 29/11/2024
4 Katie, B (2024) The Work is a Practice, Available at: https://thework.com/instruction-the-work-byron-katie/ Date accessed: 2/12/2024
5 Schwartz, R (2024) The Internal Family Systems Model Outline, Available at: https://ifs-institute.com/resources/articles/internal-family-systems-model-outline Date accessed: 02/12/2024
6 Dunbar, A (2017) Clean coaching: The insider guide to making change happen Oxen, UK: Routledge