

## Section 5: Coaching Case Study

### Extracted from AC Coach Accreditation Scheme Worked Example

#### Worked example:

The following case study is a 1000 word submission that would meet the requirements of an Accredited Executive Coach Application. The headings are chosen by the applicant to lead the reader through the process and learnings. You may wish to use different headings.

#### Introduction

This case study is based on a piece of coaching work undertaken with a Deputy Head of Department for a property care function working within a university. He is a qualified surveyor, managing both technical and non-technical staff. He manages several different functional areas including surveyors, electrical engineers, building contractors, security, catering and other related support services. In the absence of the current Head of Department (HoD) the client also deputises for him. He aspires to the HoD role and wants to be ready for this when it becomes available. He's involved in some building projects of both strategic and financial importance to the organization. He is married with grown-up children and describes himself as a 'family man'.

#### Initial Contract

Four sessions of 60-80 minutes duration were contracted with the client. All sessions took place in the client's office at a mutually agreed time and date.

#### Assessment

What came out of my first encounter with the client was that he regularly attends personal development courses and was left wondering whether this was his latest personal development 'fix' and questioning his real commitment to the work. For this reason and to break the apparent pattern of development work being done 'to' him with him being a passive passenger in the process, I chose not to use psychometrics instruments. In discussion, we agreed to keep an open-minded view as to their future use.

#### Initial Impressions

The client was willing to engage with the exercises and was always prepared for the sessions. I also noted what I interpreted as a high need for recognition, acceptance and a fear of rejection. I experienced the client as a personable and genuine individual with whom I thought I could work. On reflection, I wish I had paid more attention to my initial reaction about his commitment to the work and had thought more fully about a pre-coaching assessment.

#### Presenting Issues

What emerged from the first session was a range of inter-connected outcomes covering:

- Personal issues - including confidence, raising his profile, networking
- Resourcing issues - around staff shortages, lack of personal and staff capacity
- Working method and work-life balance issues - manifesting itself in limited work role effectiveness and a negative impact on his personal life and marriage.

#### Coaching Process/My Observations

In the first session, the client chose to explore work-life and related issues, including his personal and time management. A number of practical actions were agreed for him to carry out between sessions.

At the second session, two months later, the client reported good progress on some of the actions and limited progress in other areas. Overall there was reasonable progress which I was keen to

consolidate and embed. Also during this session, the personal issues identified above came up again and were explored further. We started to enter much more personal terrain this time.

Two months later, a third session was held. Again progress in practical areas was reported by the client. Issues of confidence and anxiety were raised and explored. I was concerned about his apparent progress on the one hand and lack of tangible commitment to change on the other, so I took the client to supervision, which was helpful.

The fourth session took place several months later. We worked more specifically on what the client would do to influence the outcome of whether to recruit the interim HoD. As a result he had the content to put into a letter to send to the Finance Director. We also worked on his self-limiting beliefs and perceptions as HoD.

Reflecting upon the session, I conclude that there were patterns of behaviour here that surfaced across the sessions. With this awareness I actively tried to break these patterns in this session by trying to remain neutral and thus encouraging the client to make his own decisions.

Although I am aware of the power dynamics between coach and client and had tried not to collude with the client in earlier sessions, I think I may have done unconsciously by directing the coaching process more than may have been necessary at times. I may have fallen into the role of Rescuer (one of my own patterns of behaviour) – something I was keen not to repeat in this session and largely achieved I believe. This change in intervention from me led to a degree of circling in the session, and an apparent lack of progress. I experienced this as frustrating and with hindsight could have used this felt-experience and me as an instrument of change by sharing this with the client.

On reflection I consider that time exploring the context was time well spent. I recognise that how the client behaved towards me (deferring decisions and acting passively) may reflect how he behaves towards others at work. Although I didn't share this with the client, I feel this is material that could be used to support him in challenging others' perceptions of him in the HoD role and his step-up to it. I wonder if his bosses share my frustrations over the client's hesitant operating style? I didn't see this issue as clearly in session as now.

I was mindful the client appeared to be unable to share his issues with anyone at work due to his leadership role. I was aware of the value to him of being listened to and that he might be able to resolve his problems, issues and conflicts through coaching.

I think at times I got sucked in to the client's story and lost a degree of perspective. His operating style was cognitively based and negative. I was conscious that his sense of hopelessness might drag me into a pattern of 'fixing' things with an urgency to get a result. I tried to reflect back what I had heard him say and ask him questions to make him 'stop and think'. On reflection, I could have made more 'use of self' as a source of data to inform our work.

I was concerned about the client's deferring decisions to me e.g. over the direction of the coaching, and his lack of clarity about what he really wanted, including from the work. I took this to supervision and gained some useful suggestions about managing these issues.

### Ending

After the coaching, I contacted the client to enquire about the outcomes. The client felt he had made some progress and that the coaching was useful. It was hard to measure clearly since he could not articulate all of his outcomes. He still awaited the decision to appoint a HoD. We agreed he would decide if and when he wanted further coaching.