

Coaching Case Study- Example 1 1000 words

Introduction

My coachee, named Debbie*, is a clinical team manager in the NHS Trust I work for. Debbie manages a busy health service in central London, where she has worked for 15 years before her promotion into her first management role two years ago, when she began managing her former team. She came to coaching describing herself as a 'crap manager' without 'a clue what she was doing' and took up coaching alongside the Trust's in-house leadership and management development programme.

Initial Contract

Six sessions of 60-90 minutes duration were contracted with the client. All sessions took place online via MS Teams.

Assessment

Before meeting Debbie, I asked her to complete a coaching questionnaire to familiarise me with her and her goals for coaching. We read through the questionnaire together, where Debbie had indicated goals to become "a more compassionate, objective leader, be able to reflect in the moment instead of retrospectively, be less critical and more 'glass half full' and have better boundaries with staff and less stressed." She indicated that we would know if she had succeeded each outcome by noticing her feeling "more compassionate and less critical and irritated with staff I manage, work colleagues and myself. Better working relationship with staff within the service."

Initial Impressions

Debbie was enthusiastic about coaching, and communicated clearly how much she valued the space. She described having lots to bring to sessions and clearly considered how to use sessions before attending. I felt a real warmth from and towards her from the first session, as well as some vulnerability and shame around her own lack of self confidence. I was also struck by Debbie's authenticity and a striking sense of resilience and inner strength, as well as a strong commitment to self-improvement.

Presenting Issues

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

- Debbie wishing to feel less overwhelmed by what she perceived as her own shortcomings as a manager
- Debbie wanting to cultivate more compassion for herself, her colleagues and her direct-reports
- Debbie describing not having any peers in her managerial role, and the way this isolation affected her

Coaching Process/My Observations

In our first session, Debbie and I spent some time further unpacking the presenting issues, and eventually came to establish an outcome of her wanting to improve her relationship the 'particularly difficult' team she was managing, her former peers. Towards the end of the session, by using OSCAR as a structure for the conversation, she was able to identify actions that would support her to show

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up more effectively in meetings with the team, such as mindfulness before and after meetings and committed to pro-actively ensure this practice as an action.

Over the course of the next couple of sessions, I repeatedly found myself struggling with getting caught up in content over process initially, mirroring Debbie's own sense of overwhelm in trying to work with the team, but often found myself able to reflect and introduce feedback and more process-focused questions which linked back to her outcome from the second half of sessions onwards. For example, in exploring what Debbie needed in order to manage the team effectively, I shared the perceptual positions model with her, which she found a really helpful.

Another struggle I occasionally wrestled with was my poised inner advice monster and the 'rescuer' role arising within me- one of my own patterns. I think this was exacerbated by Debbie's ongoing challenges with confidence and requiring gentle reminders around me as a coach not being an adviser. Surprisingly, Debbie's own inclination to look for rescuing from me actually helped me to maintain this boundary and it was helpful to practice ways in which to reinforce this with warmth and humour.

By our fourth session Debbie reported significant progress: she had made good headway with the actions and though the team's behaviour had not entirely changed, she was experiencing the team differently as a result of her own changes. Moreover, she was delighted with the difference that she was noticing in herself: that she was no longer 'flying off the handle' and finding herself more thoughtful and less reactive when communicating with the team. She said that she was finding herself being more compassionate with herself, too. She did, however, describe a persistently difficult relationship with one member of staff and so I shared with her the 'transactional analysis' (TA) model, which she felt resonated. Debbie left with an action of approaching the next conversation with the individual with this model in mind.

Ending

In our last session, Debbie reported that she had received her 360 ° Feedback and been shocked at how complimentary many of her direct reports were about her. It was a well-timed resource for me to feed back to her (as I had done before) the consistent discrepancy between how I had experienced her in sessions and how she describes herself. Conversely, she had a particularly difficult experience with a colleague which left her feeling disheartened as the colleague reinforced that she was a 'crap' manager. Whilst sensitive not to invalidate her experience, I re-framed this for Debbie, who was proud to report that she did not 'lose her cool' during the confrontation as she may have previously, and I reminded her of what a huge test this was of her progress- and how she seemed to have passed this test with flying colours! This allowed a nice segway into a broader discussion of her progress and review of our coaching, which Debbie was very complimentary of and was able to recognise positive changes in herself, including no longer considering herself a 'crap' manager. I did notice, however, that Debbie didn't feel ready for coaching to end and was curious about what I could have done to contribute to this. Whilst she articulated that our relationship was hugely valuable to her, and perhaps something as simple as a CPD space which is entirely confidential and was what made coaching hard to end for Debbie, I didn't want to foster dependence and did notice occasionally in sessions she would locate the magic of the coaching process in me, which I had to gently re-locate back in her and the process. Upon ending with Debbie, I wondered if perhaps defining outcomes more concretely and in a way that could be measured and realistically achieved in 6 sessions would have left her with a greater sense of closure upon completion of session 6, and thus a readiness to finish coaching.

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How I met the AC Coaching Competencies in my work with Debbie

AC COACHING COMPETENCIES

<p>Established the coaching agreement and outcomes Coach asks questions so an observable outcome/goal emerges for the session. Coach establishes how they will work on these. Contra Indicator: No session goals or outcomes/ways of working set</p>	<p>When we began our coaching together I shared a copy of our coaching contract with Debbie and we discussed the key elements of this in our chemistry session, mutually agreeing to it. In this conversation I clarified how I could work with her, what I couldn't do (advise, guide or provide therapy or ongoing support) and we established the goals through the use of a completed coaching questionnaire and follow-up conversations in our chemistry session and first session. OSCAR was also consistently used as a model to structure sessions.</p>
<p>Establishing a trust-based relationship with the client Establishes a high level of rapport to build an open dialogue with the client. Engages and builds trust with the client through the interchange of dialogue. Contra indicator: no rapport built</p>	<p>I worked hard to build rapport with Debbie and feel I did this successfully- she was always very complimentary about how safe she felt to express herself during coaching and would say things like "I thought of what we had talked about and instead of..." or "You would have been so proud of me!" when reporting back positive changes, which I think – alongside the highly complimentary evaluation questionnaire that she sent back to me – suggests she experienced the rapport built as positively as I did.</p>
<p>Managing self and maintaining coaching presence Pays close attention to the client, staying fully present and engaged. Bridges client to goals Contra indicator: coach lets client go off at tangents for entire session away from initial goals.</p>	<p>My presence and close attention to Debbie was displayed via my spontaneous introduction of appropriate and relevant models to Debbie throughout the sessions, without taking these into sessions as a 'pre- set' agenda. I was unafraid to occasionally interrupt Debbie, with warmth and humour, to retain and reinforce our rapport, as occasionally a lot of narrative did run the risk of taking up a lot of session time. Consequently, me being attuned but assertive within sessions allowed Debbie to move towards her goals and check in with these at next session to ensure accountability.</p>
<p>Communicating effectively Demonstrates effective listening and clarifying skills and differentiates between what is said and what's left unsaid. Asks questions around what's not been said. Contra indicator: summarises inaccurately or next intervention is not aligned to what client has just said</p>	<p>Reflecting back and asking Debbie to affirm my understanding of her situation was a frequent feature of our coaching sessions and also allowed her to hear her own words back. I would also hold curiosity around the links between different pieces of information Debbie shared and the links between them and what was left unsaid around these links. I would often share my curiosity about what was left unsaid by stating my curiosity regarding</p>

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	possible links and asking Debbie to tell me more.
<p>Raising awareness and insight Asks questions to challenge client's assumptions, elicit new insights, raise self-awareness and gain learning. Expands options "what else?", Intervenes with "May I offer some feedback?" "What I'm noticing is"</p> <p>Contra indicator: No observational feedback</p>	<p>At the beginning of our work, I would often soften questions which might provoke self reflection by using statements such as "and if its okay to ask, can you tell me..." As time went on, Debbie had a really positive response to these questions and seemed to get a lot from being asked to think at a level which would lead to learning and self awareness. I especially remember a 'sparkling moment' when I asked her when she first experienced the feeling that she needed to 'fight off' criticism and she took some time to recall some details from her childhood and early career as an intensive care nurse. As a way of building and retaining rapport, in some sessions I would I often used myself as an example to deliver feedback. For example, I might say "In my own experience, I can find it really hard to listen to difficult feedback at times when my resilience isn't high... Would you say you connect with that?" After hearing Debbie's response, I would then tailor my feedback accordingly, ensuring a commitment to giving it, but ensuring the way in which I aim to land it feels attuned to her own self-awareness (or indeed blindspot) around this issue.</p>
<p>Designing strategies Supports the client to build strategies to meet their outcomes. Questions such as "What support might you need" Contra indicator: Doesn't ask any question to explore the support the client might need or not</p>	<p>Over the course of our coaching sessions, we thought a lot about Debbie's 'toolkit of enablers' of people, models, contexts (such as a quiet room for her mindfulness), times of day or week which would help her have the best chance possible of succeeding with her planned actions in pursuit of her outcomes. We would essentially walk through all the potential barriers and then a 'who, what, where, when, how and why' checklist for each plan.</p>
<p>Maintaining forward momentum and evaluation Holds attention on what is important for client, leaves responsibility with client for action e.g. follow through, holds client accountable for what they say they will do & their plan. Contra indicator: No focus on accountability, lack of momentum.</p>	<p>At almost every session, after a personal check in, we would revisit the goals set at the last session and recap the conversation in order to keep track of progress. When Debbie was not able to follow through on actions as she'd hoped, I would respond with curiosity and help her move away from a shame-focused place and into a curious position herself, in order to explore the barriers and remove them for next time as part of forward planning, ensuring she didn't get into repeated patterns of not being able to fulfil her actions.</p>

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<p>Executive Coaching Skills (if relevant) Working within the organisational context, understanding leadership issues and working in partnership with the organisation</p>	<p>Aware of the working context Debbie was operating in, I was able to help her identify key contacts, such as the Organisational Development team, who would have access to resources and perhaps guide her with planning an away day to support her team to return to a shared vision of their primary purpose. From drawing upon my own leadership experience, and familiarity with organisational dynamics and patterns, I was able to identify models such as transactional analysis theory and perceptual positions, which could support Debbie to think differently in relation to her leadership role. I worked in partnership with the organisation by aligning some of the theories I used to the contents of the leadership programme which Debbie was accessing at the same time as our coaching, ensuring the theories I introduced were complimentary to the messaging of the programme.</p>
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Sue Macmillan 1st marker

Many thanks for this case study – you have clearly honed and used some excellent coaching skills and tools. You give lovely clear examples, so much so, I can almost imagine being in the room with you! “Debbie” clearly made some significant shifts and was able to the impact of that. I loved the way you helped her reframe when she had setbacks so keeping the forward momentum to sustain the more enabling beliefs.

You are clearly not afraid of asking challenging questions and digging deep into the psychological underpinning of behaviours. This is excellent as we know that behavioural shift happens at a beliefs and values level. It sounds like you have a natural way of softening the challenges and deeper question that allow it to land for coachee in the attachment side of the emometer and so enable their best thinking. You might want to think about using more overt narrative enquiry too to help support your natural style as a coach of seeing connections and themes to feedback as noticing.

You show excellent self awareness and it would have been good to hear a little more about how you felt at key moments eg “crap managing” and the shinning moment.

In terms of the ending, it is important to avoid dependency and remember you can recontract if there is still some work to do on the initial outcomes or if the outcomes have changed.

Good luck with your ongoing coaching journey – you are an excellent intuitive coach and your coachees will gain much from their interactions with you. 😊

2nd Marker comments: Anusha

This is a great case study and clearly outlines your approach to the coaching sessions. As Sue states, the coachee has definitely benefited from the sessions with you, not just from an action perspective

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but also an underlying psychological basis to really understand patterns and embed some of the change.

Your self awareness and intuitiveness are a great asset for you. As I read through the case study, I found myself thinking something and in the next line, it was answered or you had reflected on it. I would encourage you to continue to listen to your gut and use this as a tool perhaps also to share feedback with coachees. Sometimes this can be a real value add for them.

I also really liked the variety of tools that you introduced as and when you found they would add value to the session. That is great to see and I hope that you will continue to develop other tools that you can use too and also feel comfortable enough to rely on your great questioning skills.

I resonated when you said that you felt like you got caught up in the content, especially as you start out and not sure if you should interrupt. As an internal coach, this may happen from time to time, specifically where you might have some additional background. I found it useful to add a question like: Thank you for sharing, there is a lot in what you have just shared – what would be most useful for you to discuss or work through in the next x minutes. What would a good outcome look like when we get to x time? Also you mentioned that you were able to interrupt her with humour at times, this is also a useful tool which can help to lift out of detail or shift direction where required.

I wish you all the best on your ongoing journey and echo what Sue has said, your coachees will find working with you very valuable!