

## Coaching Case Study Example 3 – 1000 words

### Introduction

M came to me through the 21<sup>st</sup> Century Leadership Programme (21CLP). From coaching she wanted to consolidate her leadership skills, with a focus on being a fair leader, upskilling others and staff retention. She was critical of herself, scoring herself low on confidence, use of time, career development and planning, whilst judging herself strong on relationships and personal effectiveness. She wanted to improve her work-life balance, and brought a broad aim of 'personal development', but the greatest focus was how she could support her team.

M threw herself into coaching with an enthusiasm that surprised me and I warmed immediately to her energy. She wanted to learn from a senior female leader; from the start she was eager for advice and to hear how my I fulfil my leadership role.

We contacted for 6 sessions each of 90-120 minutes, meeting face to face as her preference, and have had 5 sessions together so far. She postponed once due to work pressures, and has been otherwise very committed.

### M's development, choices, awareness and the change in her

M was my first coachee, and we have developed alongside each other.

We began with tackling a transactional issue - her desire to get more support from her line manager. She was able to articulate her needs, to see things from her manager's perspective, she identified the gaps and explored options to fill this. For me it felt safe. I used the OSCAR (Gilbert & Whittleworth 2009) framework and stuck to my questions, and she went away happy with a concrete solution to a specific issue. What felt uncomfortable and not in keeping with my view of a coach's role were her requests for advice and I struggled with this as I felt she was putting me on a pedestal.

Over time we discussed more thematic issues, all linked to her initial goals, shaking me out of the safety of rigid frameworks and questions, away from the superficial and into deeper territory. I got braver and more flexible as my knowledge and confidence in my skills improved. We had built a strong rapport quickly; she trusted me and was willing to be vulnerable and to work hard.

Throughout the next few sessions we moved through 'self-compassion' and compassion in the organisation; to taking time for herself and carving out time within work to focus on key tasks; to a focus on delegation. She identified key outcomes, and as I developed I found myself holding the space better and longer to get to the real outcome, and focused on the enquiry and exploration of issues much longer. She was willing to spend a lot of time on choices, really plugging all the options available to her and she was often thrilled with all the choices that opened up as a result. For example, in our 4<sup>th</sup> session focusing on delegation she uncovered a range of benefits to herself, to patients, and to staff, and she identified some great examples of effectively delegating which she would use as a framework going forwards.

This discussion led me to introduce the 'life scan wheel' which she took away as homework and our latest session began with how well balanced she feels in her life; in all pretty well balanced, with

career and personal growth rated lower, and which we will take forwards next time. This felt a great step forwards as initially all her aims had focused on how she supports others.

When we first met I found M to be verbose. She tends to do 'big picturing' and 'yarning', so named by Michael Bungay-Stanier (1), and I have learnt to frankly challenge this in her by stating 'I'm noticing that ....'. She has developed to be more concise and refined in her delivery.

A second key change is an increase in confidence in her own ability as I notice her requests for advice have reduced and she no longer defers to me for decisions.

### **Successes, challenges and learning**

I like frameworks and have found Jenny Rogers' (2) timed structure helpful to plan sessions. I have developed my use of OSCAR, noticing that giving enough time to identify the true outcome and the choices available, holding the line of curiosity for longer, reaps rewards.

I've developed by listening to her feedback, I'm braver at challenging when it's hard to get to the point, and am conscious of keeping moving forwards. M comments on the questions I use such as 'and what else?', suggesting these are raising her conscious awareness. Other particularly useful questions for her include 'what's the real challenge here for you?' 'what will help you achieve those actions?' 'What other choices do you have?' and 'I'm most interested in ....'

I found it hard to manage her requests for advice at the start, reflecting on the potential power imbalance whilst we should be equals. But I have relaxed about giving advice when she does ask; reassured by Jenny Rogers (3) that it's ok to give advice she's asking for and it's the coachee's choice whether to use it or not.

M liked the visual of the 'Life Scan Wheel' and in hindsight I wish I'd introduced it much earlier. On reflection 'Perceptual Positions' would have been useful in the first session, and in a similar scenario I would use this now.

I have become more agile in introducing tools in the moment. In our latest session I introduced the SAGA cards, explaining how they bring through the unconscious, and whilst my delivery may have been a little stilted M was delighted with the outcome and how she felt about her problem.

I've learned to end sessions by asking 'what was most useful for you today?' to help bring her learning into consciousness to help her embed her desired changes.

### **References**

- 1) Bungay-Stanier, Michael (2020) The Advice Trap: be humble, stay curious and change the way you lead forever
- 2) Rogers, Jenny (2016) Coaching Skills: the definitive guide to being a coach. 4<sup>th</sup> edition
- 3) Rogers, Jenny (2021) Are you Listening?: stories from a coaching life

## Assessment against the AC coaching competencies

Use the AC competencies to capture feedback during the coaching session:	
<p><b>Established the coaching agreement and outcomes</b> Coach asks questions so an observable outcome/goal emerges for the session. Coach establishes how they will work on these. <i>Contra Indicator: No session goals or outcomes/ways of working set</i></p>	<p>In most sessions I facilitate the coachee to set the outcome for the session and we come back to it for review at the end.</p> <p>In the last session we could have more clearly articulated the outcome</p>
<p><b>Establishing a trust-based relationship with the client</b> 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. <i>Contra indicator: no rapport built</i></p>	<p>Our rapport is good. Meeting face to face has helped to forge our relationship, as well as lending itself better to noticing non-verbal signals. M has reflected that one of the most useful things for her has been feeling safe.</p> <p>Over time she hasn't asked for my advice as she's developed into owning this more for herself.</p>
<p><b>Managing self and maintaining coaching presence</b> Pays close attention to the client, staying fully present and engaged. Bridges client to goals <i>Contra indicator: coach lets client go off at tangents for entire session away from initial goals.</i></p>	<p>I am fully present and listen well, as shown in my agility to bring in new tools as they seem helpful.</p> <p>On occasion I have bridged goals by bringing her back to focus when things may have become muddled in the middle of a session.</p>
<p><b>Communicating effectively</b> Demonstrates effective <b>listening and clarifying</b> skills and differentiates between what is said and what's left unsaid. Asks questions around what's not been said. <i>Contra indicator: summarises inaccurately or next intervention is not aligned to what client has just said.</i></p>	<p>My active listening is strong, and I have developed over time to use slightly less clarification, having reflected that I may have over-used it as a stalling tool early on, to give me thinking time. I feel now my clarification is definitely in service of the coachee.</p> <p>I make good use of questions, actively noting which I need to use more of, reflecting on the ones that M has reported to be most meaningful to her.</p>
<p><b>Raising awareness and insight</b> 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 ....." <i>Contra indicator: No observational feedback</i></p>	<p>I've occasionally struggled with 'and what else' due to the response often being to question me about what's on my mind. I now routinely use 'what I'm noticing is ...' and 'may I offer a comment ...' when it feels appropriate.</p>
<p><b>Designing strategies</b> Supports the client to build strategies to meet their outcomes. Questions such as "What support might you need ...." <i>Contra indicator: Doesn't ask any question to explore the support the client might need or not</i></p>	<p>I could do more of this, but often as what support she needs, and then act on the response</p>
<p><b>Maintaining forward momentum and evaluation</b> 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 &amp; their plan. <i>Contra indicator: No focus on accountability, lack of momentum.</i></p>	<p>I hold attention well, sessions are forward focused as I have found strategies to address her earlier verbosity and as she had become more focused. Most often the pace feels good and we have a clear ending with an outcome.</p>
<p><b>Executive Coaching Skills (if relevant)</b> Working within the organisational context, understanding leadership issues and working in partnership with the organisation.</p>	<p>Not always relevant, but we have weaved in CNWL's values and the organisational SCARF approach as they have arisen.</p>

### **1<sup>st</sup> Marker (Supervisor) comments: Jacqui Fairbrass**

This is a well written case study X. As your first coachee, I see that M has gained a lot of value from your relationship with her. You have added some good self-reflection and gained confidence in using various coaching approaches.

As you'll see from my comments the main themes link to several key areas that would serve you well in your future coaching and I know from our supervision that you have already started to do more of this:

- Clarity around your contracting about issues like advice giving and the equality of the relationship (especially if you coach future lower grade personnel)
- Your confidence to move beyond the OSCAR framework and try a variety of approaches all within a general coaching conversation structure with goals at the start and actions at the end. Tools are not even required but some allow you to dig deeper sooner and start to explore some the deeper psychological themes that will always be there no matter how transactional an issue presented really is. I would encourage you to try a personal narrative as an early intervention in the same way as you're thinking of using a life wheel early on.
- Keeping the great questions and feedback going. You're doing this so well and it reaps benefits – noting from above that no tool is often required if the right noticing leads to the most useful question. You have honed your already good listening skills and starting to notice when it would have been useful to dig deeper to more quickly get to the heart of the conversation. I have no doubt that this will come as you feedback more around what you are feeling and noticing about patterns and create the boundaries around a conversation that allows safe exploration of underpinning themes.

Although the word count is restrictive, it might have been useful to reflect a little more about the thoughts and feelings going on for you when x or y happened with M. That said, I applaud your overall reflective learning themes pulled together and gain a great sense of how this learning is having impact on your future coaching as it illustrates your growth as a great coach.

I also applaud your coaching text references and I can see that your CPD has also had an impact on the coaching with M. Great work

### **2<sup>nd</sup> Marker comments: Sue Macmillan**

Thank you X and I would agree “great work” it is always a privilege to witness adult development and you certainly show us that here in your coaching development and in a short work count. I agree with Jacqui that a little more reflection on what you were feeling and thinking – a little more on the process and less on content.

Good luck in your ongoing coaching journey and I know you will continue to hone your skills as a coach and I'm sure those skills will serve you well as a leaders too.