

Coaching practice: Consider a case study

Thinking through case studies can help prepare you for real coaching conversations in the future. Try it alone or with a colleague. Consider the case study below, and the kinds of challenges and opportunities this person might have going on in their life. Write down some examples of how you could approach a coaching conversation with this client.

Linda is 35 years old, has two children under 8 who live with her. She is divorced within the last year.

- She has very little savings in the bank.
- Although she has a part-time job she often has trouble making ends meet at the end of the month.
- She has a smart-phone but does not have a computer at home.
- She has her high school diploma and completed first-year University more than a decade ago.

Linda's worried about her money management and doesn't have a lot of confidence or optimism in her future. She's come to you as a financial coach to see what her options are.



Starting the conversation

How would you start the meeting with Linda? Think about: Greeting and welcoming, starting the conversation, building rapport.

Powerful questions

What are some powerful, open-ended questions you could ask to explore Linda's motivation, needs, and goals?

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Listening

Reflect on the kinds of answers Linda could offer you. What could you be listening for in her answers, to help you continue the conversation?

Action-planning

Linda might ask you what some options are. Without giving her direct advice, how could you offer her some choices for actions she could take next? What resources or tools could you offer her?

Completing the conversation

Reflect on a few different ways you could close the conversation in a way that ensures Linda has a clear sense of what to do next, and the type of accountability support she can expect from you.

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