

# Coaching practice: Consider a case study

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**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.**

Jacob is 57 years old, single, with no children.

- He lives with a mental-health disability, shares an apartment with a roommate
- He is employed part-time but seeking better opportunities
- As a result he is living on a very limited income and finds it difficult to save
- Although he's tried to apply for disability supports he's gotten nowhere and feels discouraged

Jacob has come to you as a financial coach because he wants to learn how to make better use of his money and is worried about retirement in a few years.



## Starting the conversation

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

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## Powerful questions

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

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## Listening

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

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## Action-planning

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

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## Completing the conversation

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

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