

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.

Nina is 42 years old, has a twelve-year-old daughter, and is currently living on social assistance.

- She hopes to find employment and gain financial stability, but is still job-searching after a full year of looking.
- For the last two years she has had \$15,000 in debt and has started avoiding the calls from her creditors.
- She has two grown siblings that live about two-hours' drive away.
- She wants to save money for the future and wants her daughter to be able to go to college or University in a few years, but doesn't know how much she'll need.

Nina would like to be able to help pay for her daughter to go to college or university but she doesn't know how much she'll need or how to save. She doesn't believe there is any help available for her, but has come to you hoping a financial coach will listen and give her some hope and suggestions.



Starting the conversation

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

Powerful questions

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

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Listening

Reflect on the kinds of answers Nina 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 Nina has a clear sense of what to do next, and the type of accountability support she can expect from you.

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