

Example Case Study

Table of contents

Introduction	1
Assignment instructions	3
Answer example #1	7
Answer example #2	9
Answer example #3	11
Answer example #4	13

Introduction

The PN Level 2 Master Health Coaching Certification 20-week core course is a comprehensive coaching education program, in which you'll get case study assignments — drawn from our own coaching experience — that help you practice your problem-solving, address real people's real issues, and explore some of the most current research in the field of coaching and nutrition.

Here's a quick overview of how case studies work:

Case studies are due five weeks after they are assigned. Assignment instructions and submission due dates are clearly communicated in your program dashboard.

You'll have to prepare a written response, usually about 1-3 pages long. We provide specific length recommendations in each case study assignment, to help you to hit the sweet spot. (Too much or too little information can both bring their own set of challenges.)

Case studies are graded as *pass* or *no pass*. (In other words, you won't "get a grade" of B or 73% or 7/10.) Missing the case study due date is an automatic *no pass* grade.

Each case study will be a little different but they will require demonstration of your coaching skills and/or your understanding of coaching theories and application.

In this PDF, you'll find an example of a case study, complete with instructions and some answers submitted by our student alumnae.

As you'll see, the answers vary in writing style and presentation.

While these case studies are assignments, look at them as a form of play.

We take our nutrition and coaching science seriously, but science is driven by the joy of inquiry and the pleasure of curiosity.

And the “play” mindset helps us bring our “best brain” to the job — we’re much more able to be creative, flexible, and synthetic when we are playing.

Case studies ask you to observe carefully, consider the options, and then research, analyze, and interpret the problem in order to solve it.

The important takeaways:

- There are many “right” answers to a case study.
- We’re more interested in how you approach solving the problem — your comprehension, critical thinking, research, and communication skills — than whether you get a “perfect” answer.
- All case studies will require you to include learnings from the lessons presented in the course.

Assignment instructions

Case study scenario: Eeyore

Apply your mental training skills to a tough client.

Did you ever read *Winnie the Pooh* as a kid? Remember that character, Eeyore the donkey? Boy was he gloomy.

In the original stories by A.A. Milne (before the slightly cheerier Disney movie version), Eeyore was a major downer, sharing a variety of soul-shrivelling opinions such as: *“We can’t all [do things], and some of us don’t. That’s all there is to it.”*

If there was a silver lining, Eeyore was sure to find the dark cloud around it.

Today we meet Eeyore in the form of a client.

Meet your client, Lynnette.

Being around Lynnette is sort of like having a bucket of molasses poured over your head. She’s sweet. But she can really weigh you down.

Lynnette is full of “can’t-do” energy. In her world, everything is an obstacle. Opportunities for failure abound. She’s a walking catalogue of her faults and weaknesses.

For example, you’ve just assigned Lynnette a new habit: Build a sleep ritual that’ll help you get at least 7 hours of sleep per night.

You know she needs it. She’s pre-diabetic and if she doesn’t get her blood sugar and insulin under control, she’s in big trouble. You know that sleep is a powerful regulator of glucose homeostasis in the body, and that sleep deprivation creates major metabolic disruption that can push people into premature Type 2 diabetes.

So, in your mind, improving Lynnette's sleep is a crucial habit that will also make her feel better about life in general.

Her response?

"I'm not going to do well with this habit at all. I have so little control over this. Just when I'm trying to get everything together so I can get back on track with compliance, I see that I won't be able to be compliant at all with this one. I have not been able to sleep well in the past few years, and particularly these past months it's more erratic due to hot flashes and also my husband's schedule. If I get five hours on week nights, and six on a weekend, it's pretty good. And that is not normal for my body."

Sigh.

Lynnette, sweetheart that she is, senses your frustration. She tries to make you feel better.

"I'm so sorry! I'm not upset with you! I just feel like I'll never be where I want to be."

Now she's on a roll. She's cracked open the Pandora's Box of Lynnette the Loser.

"I just don't feel like I can control my food intake like I need to. I can string together a few good days and then I just don't know what happens. I don't binge... well, not really... but I just can't seem to stop before being full. And having a horrible time sitting with my hunger and waiting. All I think about is trying to wait to eat and then it totally distracts me from doing my job and then I simply give in."

And speaking of my job, it's so frustrating... We've been short-staffed for a year and a half and my boss doesn't see filling the position as a priority.

I feel like I can barely keep my head above water most days. I am constantly picking up the house, doing dishes... and then the dog got sick... my whole life feels like one big disorganized, chaotic mess...and it's all on me.

I know I'm holding myself back. I can't seem to get my backside in gear to plan meals, prep them, etc. lately. I feel like a mental case and each day wonder if something is going to push me to a breakdown. Every day begins well... I eat well, have a plan... and it just falls apart.

I mean, I was cleaning out the house yesterday and I came across an assessment sheet from my old gym, two years ago. Since then I've not only not gone to the gym, I've put on 40 pounds! And at that time I was a member of a gym, to lose some weight.

I'm so embarrassed.

Everyone I know must have seen me putting on that weight, acting oblivious, pretending like no one could see me. And it's my fault. I just kept buying leggings instead of jeans. I'm mortified. And ashamed, and frustrated. I wouldn't have to lose 80 lbs if I had have just got it together, two years ago!

Oh, what's the use. It's pointless."

You gather your thoughts while Lynnette rummages in her purse for a Kleenex to blow her nose and dry her tears.

This woman is in serious need of positive self-talk.

What do you do, coach?

How to do this assignment

First, review the case study scenario above.

Imagine and then write the story of your next steps with Lynnette as “coaching field notes”. This case study should be about 1 to 1.5 pages long.

Imagine that you’ll then use these field notes to explain your coaching session and strategies to your supervisor — so be sure to be detailed, and help your supervisor understand the situation and your actions.

Describe your action plan, why you chose it, and how you intend to help Lynnette with her mental skills development.

Include the following:

- Using the list of capacities in the Wheel of Excellence worksheet, assess Lynnette’s mental skills needs. What mental skills would benefit her? What does she currently lack?
- What might be your action plan and strategy as a coach? What are Lynnette’s next action steps as a client?
- Why are you choosing this action plan/strategy? Why these particular next action steps?
- How will you ensure that Lynnette is ready, willing, and able to follow through with this action plan and action steps? (After all, she’s pretty discouraged.)
- Do you need to have a crucial conversation with Lynnette? If so, describe it. If not, why not?

Make sure you are clear on the assignment requirements.

If you have questions, please ask.

Review the lessons, as well as materials on communication and motivational interviewing. This will help you prepare and understand your client’s mindset.

Answer example #1

Client notes:

Lynette is struggling and feels overwhelmed. She is distracted and lacks focus. Her stress level is high and she has no strategy for implementing change. Her situation is complicated with negative self talk and no confidence. Lynette needs a win.

Because Lynette lacks commitment and belief, she cannot visualize making necessary changes that will help her succeed. She needs positive imagery and mental readiness to experience success. The phrase, “whatever you think you are, you are right” comes to mind. Whatever she thinks, observes, imagines becomes her reality. Lynette needs to believe she can do this and commit to that belief so she can take action to improve her health.

Action Plan:

- 1 Start our session with a positive fact by asking Lynette to tell me one good thing from last week. Guide with probing questions if needed, such as, Did you eat a meal with a vegetable? Were you able to move your body? Did you drink water? Let her talk about a success, no matter how small and reinforce the good with what went right. Watch for body language and cues to her emotional state, respond appropriately.
- 2 Transition by reviewing her goal and asking if that is still her focus or if anything has changed. Ask why that is her goal and find out if her actions undermine the behaviors she needs to achieve her goal. With curious intent, directly but gently ask Lynette what she thinks is the real issue. What are the facts with her situation? This will help build awareness and uncover areas to discuss or work on.
- 3 I believe stress is a real problem for Lynette and reducing stress is the best starting point to improve her mental readiness. I suspect her stress will resurface with the conversation outlined above. My plan is to take detailed notes and have Lynette walk me through a perfect stress free day (positive images on the Wheel of Excellence) - what would that look like for her? What needs to happen for her to have less stress in her daily life? Then discuss what she discovers, Lynette’s action item will be to choose one thing to focus on that she can do with absolute confidence on a daily basis. This will help alleviate some stress which reinforces mental readiness because she is choosing what she can do. In this scenario, Lynette is in control and dictating what will work for her and her lifestyle knowing the facts and challenges.
- 4 From past meetings, I know Lynette loves to read books of all genres and was an avid reader before she found herself overwhelmed and unhealthy. We’ve determined she needs a sleep ritual she can successfully implement to help her get 7 hours of sleep each night. I

am going to mention books and reading while observing Lynette for willingness and change talk when I ask if she could visualize herself reading each night before she goes to bed.

I am fairly certain she would love this to be a nightly routine, my suggestion will be to have her review the book on Sleep by Matthew Walker on Amazon and see if it interests her. My strategy is to reintroduce reading, which she loves so she will be excited to read every night before bed. This will help decrease her stress and she will start a ritual she enjoys with a book that will explain the need for sleep and its health benefits. Even if she declines the sleep book, any book will evoke relaxation and help improve sleep while increasing her confidence because she is taking action and committing to a healthy behavior that will help with her goal.

To ensure Lynette is ready, willing and able to follow this action plan, I will simply ask to rate her commitment to read before bed on a scale of 1-10, anything less than a 10 needs adjusted to be a smaller goal. Perhaps it will be read 5 pages a night or 5 minutes a night or listen to an audible book while getting ready for bed. The goal will be adjusted so she rates herself a 10 on the scale and leaves my office feeling confident and excited about this new habit. Since she successfully read books in the past, this is an obvious strength that will resonate with her and an action item created to provide success and momentum.

I do not feel a crucial conversation is warranted at this point, Lynette needs to find confidence and positivity, which I believe will happen with the bedtime reading habit. I want to give her time to incorporate reading into her sleep ritual before having a crucial conversation. With her approval, I will plan to check in via text regarding her reading to support her action step. After two sessions, if things have not improved, then I will strategize regarding a crucial conversation with Lynette and have an action plan around that conversation for the next visit.

Answer example #2

Case Study: Eeyore

Lynette is in a mental rut. We are working together to build a sleep ritual that'll help her get at least seven hours of sleep per night but she doesn't believe she is capable of change. When I assessed her on the Wheel of Excellence, I concluded that she would benefit from every mental skill in the model. The following list describes how each mental skill can help her and/or how she is lacking in that component:

- 1 Commitment** - During our discussion, Lynette explained how she signed up for a gym membership two years ago in order to lose weight. She is discouraged because she never ended up using the membership and has only put on weight since then. This example shows that she is lacking in commitment. If Lynette committed herself and consistently showed up she would see success.
- 2 Belief** - I wish Lynette believed in herself and trusted the process but unfortunately that is not the case. The first words out of her mouth when discussing her new habit was, "I'm not going to do well with this habit at all." She has little self-confidence and it is affecting her health. Believing that success is possible will help facilitate change.
- 3 Full focus** - Full focus is achieved from commitment and belief. And since Lynette is lacking in these two qualities, it means that she is also missing full focus. Lynette is focused on her barriers, such as a hectic work schedule and household duties, instead of the action steps required to achieve her goal. If Lynette had full focus she would concentrate on her sleep ritual and not allow herself to be distracted.
- 4 Positive imagery** - Lynette would benefit from positive imagery of success to help her complete her new habit. A strategy that could help achieve this is visualization. Lynette could imagine herself completing her bedtime ritual and really envision how good that would make her feel. This practice could help her want to achieve this feeling in real life as well.
- 5 Mental readiness** - Unfortunately Lynette does not display mental readiness. Instead of feeling open to new experiences, she is rejecting the idea from the start. At this point she does not feel ready to even attempt her new bedtime sleep ritual. To begin a new habit, Lynette needs to feel ready for the change.
- 6 Distraction control** - Lynette feels defeated by a number of factors including her hot flashes, husband's schedule, job, and household chores. She does not feel able to get herself back up after she falls down. By shifting her mindset, she can learn to re-focus when she gets distracted to help stay on track with her goals.
- 7 Ongoing learning** - Lynette could benefit from having an ongoing learning mindset. For example, Lynette felt down that she did not follow through with the gym membership.

Instead of feeling down, she could view it as a learning opportunity. Perhaps a gym membership does not provide the support that she needs and she would benefit from a different form of physical activity instead, such as joining a pickleball league.

It is evident that Lynnette needs to work on her mental skills. This is something that I would like to work on with her as a long-term strategy. She would benefit from deep breathing, positive self-talk techniques, visualization, and focusing strategies. These habits are very important for her overall well-being but also for her success with other habits.

In the meantime, I will focus on a single action step to help increase her success rate and self-confidence. I will put the sleep ritual habit on hold as it does not feel attainable to Lynnette right now. Instead I will focus on pointing out positive facts and ignoring the negative. My action step is for Lynette to set a reminder on her phone and to practice positive self-talk twice a day. This will hopefully help increase her belief and commitment.

To ensure that Lynnette is ready, willing, and able to follow through with this action plan and action steps I will use a “on a scale of 1 to 10” strategy to see how much Lynnette truly cares about improving her mental health. For example I would ask her, “On a scale of 1 to 10, with 1 being ‘I’d rather be stuck naked in Antarctica’ and 10 being, ‘I wouldn’t dream of giving this up’, where does pointing out positive facts daily sit for you?”. If her number is low I would see if a different mental strategy is more appropriate.

Based on the information provided in the case study, I feel that I do not have adequate information to make a decision on whether or not to have a crucial conversation with Lynnette. I want to ensure that I have good rapport with the client before I have a crucial conversation so that they know I have their best interest in mind. I hope that Lynnette believes in herself and commitments to her habits to help facilitate healthy change in her life.

Answer example #3

Case study: Eeyore

Lynnette would benefit from *positive imagery* as I believe that replacing her negative spiraling thoughts with images of herself being successful would be a great start to her making progress in feeling better and finding results. She is currently very negative about herself and the idea of her completing anything successfully. From her description of her “chaotic mess” of a life I would say she could eventually benefit from building the mental skill of *distraction control* to gain the strength she needs to refocus and get back on track when she has a bad day at work, misses going to the gym, or her dog gets sick just to name a few of the examples she listed off to myself while crying.

She currently is lacking *mental readiness* and *self-belief*. In our client meeting she immediately started to tell me how she was going to fail her new habit of building a sleep ritual before she had even tried to succeed. She then broke down criticizing herself and listed off all of the negative aspects that were currently occurring in her life such as her hot flashes, husband’s schedule, her overwhelming job and not going to the gym for over two years.

As Lynnette’s coach my first strategy is going to be bringing her back to the basics. Discussing what she currently is doing well and discussing one to three things that she is already confidently and consistently achieving daily. This should help her start to feel more self-belief vs self-doubt knowing that she is capable of successfully completing tasks that contribute to her health because she already has been completing them daily! To begin to develop positive imagery I am going to have Lynnette picturing herself completing these tasks successfully. Because she completes them daily this shouldn’t be hard to do. I will ask her to describe to me how she feels when she completes these tasks and what this looks like in detail.

Next to navigate her self-doubt I am going to have her write out all of the aspects of her life that are causing it to be a “chaotic mess” and making it “impossible” for her to be successful. I will then have her describe each of the aspects to me in detail to hopefully show her that they are not as large of issues as she may have them playing out in her head. If they are large issues, we will start to discuss simple action steps she could take to mitigate or eliminate them completely. From here Lynnette should start to feel a lot less stressed.

I will then ask her to picture herself completing her sleep ritual successfully. Just as she pictured herself completing her prior tasks. I will ask that she describe to me in detail what that would look like and how that would make her feel. I will record her responses.

Lynnette’s action steps are going to be to try her best to implement her new sleep ritual. If she falls off track or something comes up, I have asked that she records what happened, the day it happened and then to re-

review her description of what her sleep ritual looks like to begin to visualize completing it successfully for the following day. On days that she completes this task successfully she should record in her journal with a check mark and possibly a few sentences on how her success made her feel. This is how I will begin to build distraction control as a mental skill within Lynnette's portfolio while proving to her that she can successfully complete her newly introduced habit even if it is just three or four out of the seven days in this coming week.

To ensure Lynnette is ready, willing and able to follow through with this action plan of trying to implement her new sleep ritual I will check-in with her and ask her to rank on a scale of 1 – 10 how she feels about keeping a journal to record how the new habit goes. I will again explain to her, it is not about completing it successfully everyday but more about putting in the effort to try and complete it and recording why it was or wasn't a success for that day.

As long as this isn't overwhelming to Lynnette and she can simply restate what I have asked her to do I will know she is going to be able to successfully complete the task.

If Lynnette still doesn't want to try the new habit and thinks that it's no use to record how successful or unsuccessful the sleep ritual is in a journal, then I will need to have a crucial conversation with her about her current negative mindset.

The conversation would start with myself explaining to Lynnette that she has hired me to help her progress and that the first step in this transition to progressing is participating. I would explain that I am not going to be angry or upset with her result of how many nights she was successful in completing the habit and neither should she. For now, I would really just like to see her record her progress and results with the new habit throughout the week so that I can continue to help her build upon those results while working towards her overall goals. I would explain that I know it can be difficult to get started on something when everything seems like it's failing but taking those first steps back in taking action will help re-spark her motivation. If Lynnette still isn't buying in I will remind her of her initial goal and explain to her that I am confident that she will be successful and no matter the data she brings back to our next meeting I am excited to review it, learn from it and grow to be better the following week.

Answer example #4

Case study 15

CLIENT: LYNNETTE
SESSION TOPIC: CREATING A SLEEP RITUAL

SESSION SUMMARY

LYNNETTE SHOWED UP WITH HER PREVIOUS HABIT DONE AT 60% CONSISTENCY. SHE ATE MOSTLY WHOLE FOOD AND IT IS TIME TO MOVE ON TO SLEEP RITUAL, BUT BECAUSE SHE ISN'T CONVINCED OR READY FOR THIS HABIT, SHE AGREED TO MOVE DIRECTIONS A LITTLE AND WORK ON HER MENTAL SKILLS FOR THE NEXT FEW WEEKS.

WHEEL OF EXCELLENCE ASSESSMENT

- **COMMITMENT: 8/10**
- **BELIEF: 3/10**
- **FULL FOCUS: 5/10**
- **POSITIVE IMAGERY: 0/10**
- **MENTAL READINESS: 1/10**
- **DISTRACTION CONTROL: 5/10**
- **ONGOING LEARNING: 6/10**

ACTION PLAN



CLIENT: LYNNETTE
SESSION TOPIC: CREATING A SLEEP RITUAL

WHY THOSE ACTIONS?

I THINK LYNNETTE HAS DONE PRETTY WELL IN THE PAST, DESPITE HER NEGATIVE ATTITUDE. WITH EATING HABITS SUCH AS PROTEINS, VEGGIES, FATS, AND CARBS SHE OVERALL WAS 50-60% CONSISTENT. NOW SHE MOVES ON TO SLEEP HABITS, HOWEVER, SHE MIGHT NOT BE READY YET. SHE JUST SPENT THREE MONTHS FOLLOWING INSTRUCTIONS (WITH NO HOPE TO SUCCEED), MAYBE IT'S TIME SHE WORKS ON MENTAL HABITS FOR A LITTLE WHILE TO PAVE WAY FOR WORKING ON A SLEEP SCHEDULE.

DATE: 31ST MAY 2021

TIME: 2:30 PM

LOCATION: THE ROSE APPLE GYM, COACH'S OFFICE

FINAL TWO-WEEK ACTION: PRACTICE SELF-COMPASSION

COACH'S NOTE: THE CLIENT WAS EXTREMELY DISCOURAGED AT FIRST, HOWEVER SHE MANAGED TO BE CONFIDENT AFTER THE DIRECTION WAS CHANGED.

SUPERVISOR'S NOTE: ACTION APPROVED

CRUCIAL CONVERSATION

A CRUCIAL CONVERSATION MIGHT HELP LYNNETTE PUT THINGS IN PERSPECTIVE.

IT DOESN'T HAVE TO BE VERY DEEP, JUST ENOUGH FOR HER TO REALIZE THAT SHE ISN'T DOING AS BAD AS SHE THINKS. I NEED TO HELP HER WRITE DOWN EVERYTHING THAT IS STRESSING HER, FOR HER TO REALIZE THAT HER JOB IS THE MOST STRESSFUL PART, THE REMAINING STRESSORS ARE MOSTLY ILLUSIONS, AND BECAUSE OF THAT, SHE IS REFUSING TO HAVE A SUPPORT NETWORK DUE TO HER BELIEF THAT SHE IS A SOCIAL FAILURE. AFTER SHE HAD EVERYTHING ON PAPER SHE REALIZED THAT SHE CAN DO SOMETHING ABOUT IT.

ME: SO WHAT DO YOU THINK NOW LYNNETTE? CAN YOU MAKE IT THROUGH TWO WEEKS OF SELF-COMPASSION?

LYNNETTE: I THINK SO...

ME: HOW CONFIDENT ARE YOU ON A SCALE OF 1 - 10?

LYNNETTE: I'M GOING TO GIVE IT A SEVEN.

ME: THAT'S PERFECT. SEE YOU IN TWO WEEKS.