

Directions for the Comprehensive Coaching Case Form

One of the requirements for certification is to document a complete coaching case with at least one of your clients (a minimum of 6 sessions with the same client within a 16 week time frame). The following instructions will help guide you in completing each area of the Comprehensive Coaching Case Form.

Client's Wellness Vision Statement: The client's vision is a realistic statement(s), paragraph, etc. describing key elements of what they would like their ideal health & wellness to be.

- What would it look like? Feel like? What would the individual be doing differently in their vision then they are doing now?
- The vision is a stretch, but something the client feels they are capable of achieving over time.

Sample Wellness Vision Statement:

I am a confident individual who likes who she sees in the mirror. I nourish my body with healthy foods and daily exercise. I discover my potential by working hard and playing hard!

Client's Priority Wellness Goals:

- Identify the specific goal(s) your client would like to accomplish. These can be long-term goals related to the vision statement.
- There should be at least one “short-term” goal documented to be evaluated at your next session with this client. Although we are not asking for evidence of your use of S.M.A.R.T. for these forms, it is highly recommended that you use the S.M.A.R.T. goal format as you continue to track goal achievement.

Examples of possible goals:

1. Julia will eat 3 servings of fruit everyday to help avoid eating unhealthy snacks.
2. Julia will be walking at least 5 days a week for a minimum of 30 minutes at a moderate intensity with her neighbor to help her physical fitness abilities.
3. Julia will practice at least one random act of kindness every week to show gratitude for the gifts in her life.

Coaching skills/strategies you found most useful in this session: These can be any of the coaching strategies that were taught throughout the Wellness Coach Training Program

Examples:

- Open-ended questions; Eliciting and Responding to Change Talk; Reflective Listening; Exploring Strengths, Values, and/or Past Accomplishments, Focusing on key elements of the “Experiment” phase, etc.

Client progress with previous goal(s): This can be a brief statement about the progress the client has (or has not) made with previous goal(s), or it can be written in “percentage” format to show what the client has completed.

Examples:

1. Joe completed 50% of the goal we set last week.
2. Mary has made no progress with her previous goals.
3. Tom completed 100% of his first goal, but has only made little progress with his second goal of using the treadmill 4 times per week for 40 minutes. He did “walk more” this week by parking in remote areas each day which forced him to walk further to his car, but he did not walk on the treadmill at all per last week’s goal.

End-of-session client goal(s) (can be same as previous goal, revised goal or new goal): This is a brief statement identifying what plans were made for next session.

Examples:

1. Joe’s goals from last week remain the same goals for next session.
2. Mary has identified the following as goals which we will evaluate in her next session:
 - Will eat at least 2 fruits each day
 - Will eat at least 1 vegetable each day
 - Will use the elliptical for 20 minutes for minimum of 2 days
3. Tom revised his goal to use the treadmill for 15 minutes at least twice this week.

Additional Comments: You can use this field to provide any information you feel is relevant/necessary.