

CASE STUDY:

Too Busy Ray

Leading up to this case study, students learn about how to help their clients work around and through roadblocks by anticipating, planning and strategizing. By this point, students are also well-versed in coaching psychology techniques such as motivational interviewing.

Many of us can relate to the client here, not just the coach. Who knows, you might even apply some of the coaching tactics to yourself!

The situation: Ray rushes into your office, late again and talking on his cell phone...

“OK. OK. I gotta go. Yeah. OK. OK, I’m here now. Yes. I have to go. Right. Call you later.”

He hangs up. Swings the phone from his ear to his face. Taps in a few characters of a text message, hunched over the phone like a starving orphan with a crust of bread.

You wait.

Eventually Ray slides the phone into its holster at his belt. Turns to you. But you can tell that whatever he was dealing with just now is on his mind.

“Sounds like you’re busy,” you say.

“Auughh,” says Ray. An expression of exasperation. It sounds like someone squeezing the wind out of him. “I swear, it’s 24-7.”

“Yes, but you’re here now,” you say, with a smile. (Nice refocusing on the positive, coach.)

“Barely,” he responds, with a grimace. “I’m sorry, I’m just so distracted today.”

And every day. Dealing with Ray is like trying to get a word in edgewise with a glassy-eyed gambler pounding on a slot machine. He’s only ever partially checked in.

You have to keep trying anyway. Ray came to you two months ago after his doctor read him the riot act about his blood pressure and triglycerides. He’s lost 10 pounds so far by making some small changes, but needs to lose about 40 more.

“So...?” you begin. “How did that new habit of food journaling go last week?” Already you’re cringing a bit. You think you know what you’re going to hear — that Ray was, once again, “too busy”.

"It was OK," says Ray. "Some days good, some days not so good."

Alrighty. This is a start. You can work with this raw material.

"Tell me what worked," you say. "Let's see what was successful for you."

"Well," says Ray, taking out his notebook, "mornings are real good. Even though I'm rushing, I can usually get a good breakfast. Those Super Shakes were a great idea! I've been putting some spinach in there lately. You were right — it's not that bad!" He grins.

You grin back. Yeah buddy.

"But then," he continues, "it goes downhill. Lunch is hit or miss. By dinner, it's a shit show."

He shows you his food journal. It is, indeed, the proverbial poop performance.

"OK," you say, putting your analysis hat on, "so what happens here?" You point to midmorning. "Before lunch?"

Ray looks blank. "I dunno. I guess it just... kinda of... gets away from me. There's so much going on. I feel like I never get a break. And everyone wants everything yesterday. Kids. Wife. Boss. Coworkers. Hell, even the damn dog is looking at me sideways.

"So I'm just rushing around, and before I know it, it's late, and I'm starving, and I don't have anything on hand, and there's that Taco Bell downstairs..."

He sighs. "I just wish everyone would leave me alone, some days, y'know? I feel like I just can't get anything done. Like I'm always running but never catching up. It's one thing after another. I feel like I'm just not gonna be able to do this whole thing."

His phone rings. "Sorry, I gotta take this."

Clearly, you need to incorporate some anticipating, planning, and strategizing into Ray's life. You need to help him think and behave more proactively, while keeping him progressing with his fat loss and health goals.

What do you do, coach?

Your assignment

Where do you go from here? Write the rest of the story. What's your proposed action plan for Ray?

Describe your action plan and how you'll carry it out. Be sure to include a piece that addresses proactivity and problem-solving for Ray.

To help you through this process, here are some ideas to help you build out the action plan.

IDEAS FOR ACTION PLANNING

Previous daily coaching practices

Here's a list of previous daily coaching practices, just to give you some ideas for things to combine into an action plan.

- planning, preparing, and committing to a regular practice
- matching your coaching behaviours to your identity, values, and goals
- using assessment tools with clients
- using outcome-based decision making
- applying a learning style to the PN Certification material
- doing a daily 5-minute mind-body scan
- practicing self-compassion
- listening actively
- communicating concepts clearly
- give positive feedback
- help someone clarify their values & priorities
- creating individualized "next action steps" for yourself or clients
- keep a food record
- shape the path for yourself or clients
- having crucial conversations where needed
- practice or teach a mental skill

Action plan components

Also, review the action plan components:

- **What are you working with?** Assess the situation.
- **Where do you want to go?** Identify the main objective(s).
- **How are you going to do what you're going to do?** Determine the overall approach and method.
- **What are you going to do?** Identify a general set of action steps.
- **How will your client know what to do?** Think about how you'll communicate instructions as well as feedback, evaluation, and any potential crucial conversations.
- **Does this work for both you and the client?** Assess "fit", individualization, resonance, and salience.

- **How will you know if your plan is “working”?** Identify and develop progress indicators and a schedule for recording them.
- **What are you going to do first?** Prioritize and establish a schedule of action steps.
- **What happens if things go wrong?** Anticipate obstacles and develop some backup ideas.

Use these components to create your action plan. Good luck, coach!

Assignment instructions summary

1. In 1-2 pages, describe your action plan for Ray and how you'll carry it out.
2. Refer to previous habits for ideas, as well as the list of action plan components.
3. Be sure to include a piece that addresses proactivity and problem-solving for Ray.