Case Study TEMPLATE

**Coach Name:**

**Client Name:**

**Client Email:** (Make sure permission to share is granted)

**Client’s Enneagram Type:**

**Client’s Coaching Program Purpose & Outcomes:**

(Purpose: A one paragraph statement by your client capturing the overall mission of your coaching sessions)

It is my aim to…

so that…

and as a result…

(Outcomes: 3-5 specific and measurable results your client would like to accomplish)

1.

2.

3.

4.

5.

Client’s Initial Location on Map of Mastery: (This is based off their Purpose & Outcomes)

How did you reach this conclusion? (1-2 paragraph explanation)

|  |  |  |  |
| --- | --- | --- | --- |
| Session Date / Length | Agenda | Take-aways / Actions | Assignments (Briefly explain how the assignment ties into client development) |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |
| 6. |  |  |  |

**Self-Reflections:** (Each answer needs to be 1-2 paragraphs)

* What progress did I observe in the client?
* What obstacles did I observe the client overcome?
* What skills or learning did I observe the client achieve?
* How did I develop as a coach with this client?