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CASE STUDY 1 – ‘Bett’

Coach Name: xxx

Date: xxx

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1. Personal Coaching Philosophy

After almost a year of intensive coaching training, experiential work with coachees and many volumes of relevant reading, it seems to me that essentially, coaching looks at changing *how* a client does something whereas therapy focuses on changing *who* the client is. My personal motivation with both comes from wanting to help people realise their personal potential in life and to live through this philosophy in my own life.

I believe therapy and coaching offer opportunities for self-directed change through the moment by moment unfolding of the relationship and what is being shared across it. J Vaughan Smith puts it succinctly when she says:

"It doesn't happen at the end of a process, it is the process"

(Vaughan Smith, 2007:48)

Communication technology and media are all pervasive in the modern world creating a noisy backdrop for all our experiences. Space and time for self-reflection, meaningful dialogue leading to purposeful action are more important than ever. I am passionate about offering such a space to a 'non-clinical' client base.

Trained in the (date redacted) approach that starts from the premise of equality and psychological balance in both client and therapist, I find clinical and non-clinical to be something of an artificial distinction. We live in distorted times: arguably some neuroses are considered normal, even healthy, e.g. competitiveness, being assertive. But how human beings perceive these qualities shift with the ages. It may be our current time demands a model for human living that does not sit comfortably with all our needs.

I like the coaching attitude and believe it is something I also naturally offer in my therapy work. There is a balance between non-judgemental acceptance and the ability to hold out for their potential to be more or better is very powerful. Closely related to this is the importance of encouragement, support, belief in the coachee's ability to implement positive change and developing their self-belief, i.e. in their own ability to change and withstand setbacks.

The power of the experience of an authentic interaction and the opportunity to be more authentic in oneself, can be healing but also inspiring, and motivating. Even a single relationship can extend well beyond a session into the rest of a life and affect others too.

I believe in the role of philosophy in helping us move towards a flourishing life. The existential view is that we are meaning making creatures in an essentially meaningless world. Recent decades have seen in the industrialised West, a decline in formal religious belief and greater understanding and awareness of scientific and rational world view. This generates something of a gap in which each of us needs to create our own meaning; something we feel it is worth living for. Coaching can provide a space to do this. A place where the difficult questions can be asked and engaged with. I know that I find my own sense of meaning and fulfilment through

offering a reflective space for purposeful dialogue, with a view to enhancing the well-being and personal potential of others.

2. Theoretical model for coaching

I was drawn to train as an (modality redacted) psychotherapist at (college redacted). I felt a long-standing fascination with (modalities redacted) ideas such as finding ones meaning, limitations, choice, responsibility, authenticity and freedom. I was interested in the human condition generally and in the personal experience of living.

Phenomenology, the practice of systematically shedding light on what actually is, not what we might wish to see, is closely related to mindfulness and being authentic. I believe this applies to the coaching relationship as strongly as to the therapeutic one.

I took a training in (modality redacted) in (date redacted). This uses the felt-sense to listen to insights held in the body. Active somatic listening, both to one's own body and that of the client (sometimes referred to as the client's client), integrates beautifully with a phenomenological approach. Working in a focusing oriented way counters the overly cognitive, reason based style of many coaching clients, particularly those who are high-functioning and have achieved considerable material and professional success. My regular yoga practice informs my work and maintains my self-awareness and mindfulness.

To these, through my T2C coaching training, I have added an understanding of the fundamental objectives of coaching and a knowledge of some well-established coaching models. I have learnt about some coaching tools and considered carefully how these can be integrated into my basic therapeutic approach and way of being with a client. My main challenge has been how I can integrate a solution focused approach with an open, non-directive, client driven process. I have had to learn the differences between therapy and coaching and what the two have in common. I have learnt how to recognise when coaching seems to be sliding into becoming therapy and what to do when such moments arise.

Note. In the remaining sections of this case study, any points that I believe support one or more of the Senior Practitioner competencies and capability indicators are referenced directly afterwards in brackets.

3. Case study

Introduction to Coachee and Background

This coachee was introduced to me by a colleague on the T2C training course. A personal friend of hers over many years, now in her 50s, was considering using coaching to help review her life and career in order to reshape future direction according to her current values and objectives. I shall protect her identity in this case study by calling her Bett, which is not her real name and by changing any identifiable details about her life.

We agreed it would be viable to work together on the strength of a good rapport we both felt during the initial telephone matching conversation. We decided on 6 meetings, each 1.5 hours long. Meetings would take place either in person at a mutually convenient location, at my consulting room in (venue redacted) or via Skype. We agreed to review the number of meetings as required. As it turned out, Bett decided to extend our initial contract by a further 6 meetings (79).

We agreed a low-cost fee per meeting of £25. I felt it was important for both of us to have some financial exchange because it would minimise any feelings of indebtedness on Bett's part and possible resentment on mine. Also, being low-cost, the situation allowed me to be open and relaxed about still being in training as a coach whilst acknowledging the relevance of my experience as a therapist I was able to bring to our work (79).

Initial Contact

We exchanged mobile numbers through our mutual contact and, via text message, set a time for me to call her. My objective in this first brief call was simply to:

- establish contact between us
- schedule a time in our diaries for a telephone 'matching conversation'

I explained briefly that the main purpose of the matching conversation was to enable us both to be sure this was the right way forward. I explained that the matching conversation would:

- be based on a series of high level questions I would ask her about her current situation and what she would like to gain from coaching.
- that she would not need to prepare for it.
- take about 30-45 minutes and be conducted over the telephone.
- be free of charge and from further obligation.

I told Bett that if it went well for us both, we could agree to move to the next step; the creation and sign-off of a personalised coaching agreement. I would send this to her for review ahead of our first meeting (79).

Matching Conversation (Pre-contracting)

This was an extremely important stage of the coaching process because it offered us both an opportunity to check whether the working alliance felt viable, before embarking on the work (73, 79, 80). In general, a matching conversation can allow:

- me to assess the coachee's readiness and motivation for coaching and to spot any obvious indicators why I may not be the right coach for her, based on the issues she wanted to work on, the chemistry of our personalities, any potential logistical or practical difficulties and my particular coaching approach.

- The coachee to assess how comfortable she feels with the coaching process, my coaching approach, me as a person and what she is looking for from a coach.

I used as my template the list of questions suggested in the T2C Participant Training Pack. I rewrote them into a format of my own. It is similar to many of the questions I ask new potential therapy clients when they first contact me so I felt comfortable with the methods and approach. However, I noticed some differences in wording, style and approach which I have explored in Appendix A (73, 75, 77, 78, 79, 80, 83).

With Bett, the matching conversation went well. I could tell there was a good rapport between us right from the start because the dialogue flowed easily and with mutual understanding and purpose (74, 80). I found her to be thoughtful and articulate and I found it easy to follow her reasoning. This was confirmed by Bett herself when I asked her about it explicitly at the end of the conversation (95) and whether she wanted to continue (79). She agreed it had gone well. She told me she found it comfortable to talk to me and wanted to move on to forming a Coaching Agreement.

I used what Bett had shared with me to personalise the Coaching Agreement. To further consolidate our relationship and demonstrate I had heard her, I crafted one paragraph that I felt accurately summarised her current situation and coaching objectives and Bett agreed that it did (95). I also decided to send Bett the 'wheel of life' exercise which I invited her to try before our first meeting and Bett agreed (94). I felt it would match her stated desire to review *all* aspects of her life objectively and I got a sense from our conversation that she would value an opportunity to reflect on this before we met (80, 81, 83, 94).

Contracting Session

For us there was no need for a separate contracting session. Instead, the contracting discussion formed an integral part of our first coaching meeting. We agreed to spend the first 10 minutes reviewing the Coaching Agreement I had sent beforehand and signing two copies of the documents. This worked well as all the details had already been worked out during the matching conversation and this was simply an opportunity to review and formalise the agreement (79).

I ensured transparency and good verbal contracting by clearly suggesting how we might use this 1.5 hours of the meeting, i.e. minutes to review the Coaching Agreement and sign-off and then using the remaining time to review the 'wheel of life' exercise, using TGROW model to structure our time (79, 94).

As it turned out, we managed to complete the contracting in the allotted time but overran on the rest of the session. Bett had prepared and was keen to get started on the Wheel of Life exercise. She spent a long time on 4 segments and after about an hour I noticed we were running short of time. I took a moment to point this out which gave her a chance to decide what she wanted to do with the remaining 30 or so minutes (79). Bett elected to continue her narrative and reflections around the wheel, but at a faster pace. She reported finding great benefit from talking me

through the different aspects of her life in a way that she had not before (80, 83, 84, 86, 94).

Development of the work (include any themes as subheadings)

To date we have completed 9 meetings. Over the weeks we identified the several distinct but inter-connected themes running through our work.

Our work began with a focus on Bett's current job situation and career. Bett felt dissatisfied with her job and wanted to explore her options to change jobs, either within the sector or possibly to retrain and branch out to a new field altogether.

Taking a wider view, Bett also expressed how she felt somewhat penned in by her current demanding yet unfulfilling work commitments. She yearned to create a more balanced way of life for herself by making more time for other elements, family, friends, emotional space, time for solitude, reflection and personal creativity. Bett told me she wanted this to be her primarily goal at this stage.

I had noticed she tended to generalise and get lost down different lines of thought. I made sure I kept track of our 'road map' towards her goal and asked her questions like "When was the last time you felt you had the kind of reflective space you are craving?", "How was it helpful to you?", "What do you think stops this happening more often?" and "What specifically could you do differently to create this opportunity for yourself again?" (81, 83, 84, 85, 86, 89, 90).

In meetings 1 and 2 we concentrated on finding practical options that would enable Bett to make this more of a reality. We noticed and acknowledged how our coaching meetings themselves formed one tangible and valuable way for Bett to do just this. Alongside, in response to my explorations about what specifically and practically she might find helpful, Bett came up with other ideas such as keeping a journal and setting regular dedicated time for reflection and private contemplation (81, 83, 84, 88).

Bett felt having these set as actions as result of coaching meetings (and knowing that we would check her 'progress' on them together) helped her take practical steps that she would not have taken otherwise (90).

She also said she found it helpful that I diverted her from diving into 'solution mode' too soon (as she said she was prone to do) but instead helped her keep an open, reflective, thinking space in which she could consider fresh options and perspectives (81, 88).

Right from the outset, Bett's feedback consistently rated me highly on:

- establishing an ethically based contract (79)
- establishing an empathic and trusting relationship (80)
- listening deeply and tuning in accurately to his emotions, beliefs, language and mood (80, 83)
- using different approaches to enable insight and learning (81, 88, 89)

This was good to hear but did not come as a surprise. These are skills in which I feel well practised through my therapy training and experience. If I felt something was amiss in these areas, I believe I would be aware of this through my own self-awareness and self-reflection even before I received a coachee feedback form (73, 74).

After meeting 2, Bett needed to be away on business and holiday travel. She decided against Skype meetings because of uncertainties over her schedule and time differences. As a result, there followed a month-long break in our work. She was keen to ensure continuity so we agreed some actions that would support her process such as keeping a record of new job/career ideas as a result of colleagues and friends she might meet on her trip (85, 89, 91).

When we met for meeting 3, I remember wondering if the break might have a negative impact on our work, either in the relationship or the continuity of the work. However, I found she was just as motivated to pick up where we had left off and our dialogue continued from where she found herself following the break (79, 80).

Bett had noticed that coming back from her trip her motivation had dipped. Addressing her reduced motivation and fatigue, particularly in relation to her work, became her goal for this meeting. We spent time coming up with practical methods for her to meet her work commitments. Again, I asked her carefully worked questions to explore her experience and define how she wanted things to be (81, 82, 88, 83, 84). Examples are “Tell me why it matters to you to meet your current work commitments” and “What’s at stake for you if you don’t meet these targets and deadlines?”.

At the same time, we recognised her feelings of ambivalence and the exhaustion that came from having to work against her lack of drive. She found this particularly helpful; not to denying but acknowledge the reality of her situation (87). I felt this was important because I could empathise and feel in my own body the fatigue and heaviness Bett was describing (using the Focusing Oriented listening (74, 94)). I remember seeing how her breathing released and her shoulders relaxed back in the chair as I asked her to first take some time to tell me about her lack of motivation in relation to her work. It was clear to me she needed to give that some space before she could move past it and I too felt more congruent once we had done this (74, 94, 84, 90).

This had the effect of ‘creating space’ in other areas and the following 2 meetings allowed themes of time to emerge alongside the continuing theme of creating more reflective space. Bett noticed that she was not happy with the way her working day was structured, how she spends her time, how she arranges her time/working day/leisure time. She wanted to create and try out a significantly different daily routine which would be better suited to her all-round well-being. I did this by asking her to consider what was fixed (e.g. time difference for US clients) and what could be varied (when she took lunch), the rhythm of her own natural energy levels, what had worked well for her in the past, what she did/didn’t like about her current routine. Together we worked out definite start and end work times, set new work/non-work boundaries and how Bett could keep to them. We also built-in time for regular exercise, socialising and self-care.

Bett reported some significant but limited success in putting these actions into practice because they felt ambitious and far-reaching. However, she told me she was not deterred. She could see her efforts as an important first step to create significant and long-term changes to long established patterns that were on longer helpful for her. I reflected this was a positive and constructive response and that we could build on this. I also reminded her that for most people maintaining change is often the most difficult part of the change process (87, 91).

The following meeting, I imagined she might want to review her progress and consider how she might make further inroads into her establishing new routine. However, instead she told me how the challenge of a new routine has led her to notice other priorities; to create a greater sense of order in her physical space, to de-clutter and reorganise her home (using tips from Marie Kondo's book 'The Life Changing Magic of Tidying – which incidentally, she sent me a copy of as a Christmas gift). I had to be flexible in responding to Bett's shifting needs, whilst keeping the meta goal of career/life direction on our radar (80, 81, 84, 88, 94). Meeting 6 therefore focussed on how she might continue this project. Also, Bett wanted to use the meeting to help her plan and prepare for an important client presentation later that day. Bett felt committed and reported feeling happy with the coaching process.

Meeting 7 began with Bett telling me that whilst de-cluttering and creating order and space were still important, her priority was now to raise her professional profile, in readiness for a job change. It appeared to me that all the work to create time to think and de-clutter over previous weeks had led Bett to a place where she could finally address her meta-goal of career review and possible re-direction.

I noticed Bett went straight to the 'solution' of wanting to update her CV. This felt too narrow to me so I encouraged her to stay with this to explore additional possibilities by asking her variations on "yes... and what else could you do?" or "what else might be helpful here?" (88, 89). This resulted in her identifying 7 other actions she could take in relation to securing a new job: setting up LinkedIn profile, contacting selected recruitment agencies, contacting an old work friend to research her career change, creating a list of professional contacts; speaking to one in particular, upgrading her home office for improved Broadband and sound-proofing, updating her working wardrobe for more client facing work. I helped Bett prioritised these and checked for commitment or any resistance using scaling (82, 89, 90).

When we met again 3 weeks later, Bett's perspective had moved on again. Her efforts towards getting another job were going well and an inheritance had given her some financial leeway. She told me she felt happier, more relaxed and on top of the issues that had first brought her to coaching. I could hear this in her voice and see it in her demeanour. The coaching had addressed many of the items on her immediate agenda so now Bett's attention to was turning towards some long-standing emotional work she had been aware of for some time. We began to discuss the possibility of switching to psychotherapeutic work.

I explained that I was dual-trained with a separate psychotherapeutic practice. If she wanted to continue working with me, we could think about re-contracting and starting afresh on this new piece of work. I would want to begin with an initial therapeutic consultation as I would with any new therapy client and Bett agreed. We discussed if we felt there were any conflict of interests or boundary issues. I felt there were none on my side but wanted time to give it more thought because I could feel this was new territory for me (74, 75, 79). Bett felt the same. I also wanted her to think carefully about other options so we discussed other therapists and I sent her a couple of therapist recommendations. We agreed to mull over it and met again a month later (75, 79).

At meeting 9 Bett felt even more strongly that she had come to the end of something (her coaching agenda) and was waiting for the right time to start something else (therapy). I felt this sense of completeness as well and reflected this back to Bett (73).

She also felt sure she wanted to continue working with me because she felt she trusted our alliance and wanted to work with a (modality redacted) therapist. Having given the matter some thought, I had decided it did not compromise any boundaries or ethical concerns and told Bett I would be happy to continue seeing her if that was what she wanted.

However, she did not feel ready to start yet. She had some business and personal travel plans and wanted to wait until her therapy would not have to work around these. I told her I understood and was happy to wait until she felt ready to contact me again (80, 74, 79).

4. Use of supervision and impact on coaching practice and relation to coaching theory

Bett was one of my first coachees. As a result, I found myself giving much of my early supervision time to reviewing how I should work through the initial contact, the matching conversation and forming an ethical coaching agreement. I found it particularly helpful to clarify in my mind the differences between my initial consultation questions I use with new therapy clients and the matching conversation that I now work through with potential coachees (77, 79)

One of the most helpful comments was when my supervisor mentioned that “with a coachee you are addressing the healthy part of the person”. This phrase captures so much of the appropriate tone and attitude for coaching and helped me to connect with my ‘coaching voice’ (77, 78).

I spent some supervision time exploring my use of the ‘Wheel of Life’ exercise. I discussed whether it was best to send the exercise beforehand or not. This would partly depend on my view of the client’s ‘readiness’ towards an independent exercise at the end of the pre-contract conversation (77, 93, 94).

During the discussion it became apparent to me that either approach would work depending on the precise circumstances, but that, where possible, it would be better to send it beforehand to give the client time to reflect on it.

I found Bett and other clients wanted to use most of the first meeting to talk me through their 'wheels'. Much relevant and useful information was discussed as a result. It was also valuable in establishing rapport and trust in the coaching relationship (78, 80).

My experience with Bett enabled my first consistent use of the TGROW model, both within a session and across a number of meetings. I worried that I was not being solution focussed enough, particularly because much of Bett's coaching agenda revolved around relatively intangible goals like creating more time for self-reflection towards deciding the right change (94).

I told my supervisor that I felt much more at ease when I was engaged in active listening, corresponding to the R (reality) and W (will) parts of the model. With R, I could facilitate Bett to make sense of her reality through a phenomenological, non-judgemental (objective) exploration of her experience. Later, once she had decided on some goals, I could once again draw from my therapy skills to help her assess and strengthen her commitment to action. In contrast I noticed I felt least comfortable with solution focussed parts of the model like goal and action setting. In terms of TGROW this translated to the T(theme), G(goals) and O(options) stages (73, 76, 77).

She suggested revisiting Whitmore's text 'Coaching for Performance' to remind myself how to apply TGROW effectively and I found this very helpful. Beyond the very direct, almost forceful language he uses, Whitmore describes the fundamental objectives of coaching and how TGROW can be applied to achieve them. For instance he says,

"I am able to control only that of which I am aware. That of which I am unaware controls me. Awareness empowers me"

(Whitmore, 2014: 34)

For me, this mirrors much of what good therapy is about; self-awareness, an openness to change, being able to put energy and motivation behind new behaviours. This observation helped me to internalise the TGROW model and begin making it my own (76, 78).

From my description of my ongoing work with Bett, my supervisor felt that overall, the holistic, contextualised, relational, way I listened to Bett's material and made sense of what I heard was very much as a result of my experience as a therapist; I had acknowledged the underlying emotional and psychological issues. At the same time, she felt I had managed to maintain a 'coaching framework' and kept the process of agreeing actions open and self-directed by the coachee. This was important and validating to hear and went some way to helping me transfer my therapy learning into a coaching mode (73).

Even more influential though was the feedback from Bett herself. Several times in her feedback forms she reported how helpful she was finding our meetings. Specifically, she said appreciated space to explore and also my ability to give structure to her thinking (86) and help her move forwards in a tangible, often practical way (90). This felt important for me to hear as it provided me with experiential evidence about the efficacy of coaching methods and how helpful a coachee can find a more structured approach (75, 78).

I also described my experience of applying the TGROW model across coaching several meetings towards a meta-goal. Here I realised that my internalisation of the TGROW model was key in making it a natural and fully integrated part of my approach. I needed to feel confident and know 'we would not get lost because I had misplaced the road map' and I felt this coming through practice (93, 94). I began to notice that as my work with Bett progressed, I was getting increasingly skilled at holding our place in the TGROW process whilst becoming more relaxed about 'allowing' her to deviate and linger as she needed. If I did feel lost or confused at any point, I would make this explicit to Bett and give her time to decide where to go next. Again, her feedback confirmed she found this as helpful as I did (93, 94, 95).

During one supervision session I described how I helped Bett to ascertain her readiness for action using scaling (94). Bett had replied she felt 9/10 ready and I accepted this as the high level of confidence it showed. However, my supervisor reminded me to ask about the remaining 1/10. Was this signalling some resistance to change? If so, what could be done to remove or reduce something that could potentially get in her way. This made a strong impression on me and I re-enforced the learning point by re-reading the T2C Training Pack and some extracts of Timothy Gallwey's 'The Inner Game' which I found on-line (76, 77). It seems to me an alternative view of the conscious and sub-conscious mind, the ego and the id, how the work of the latter can disrupt and influence the former (78).

In another session, we discussed in depth the greater flexibilities in boundaries that exist in coaching compared to therapy. It made me notice the extent to which I have incorporated a holding secure therapeutic frame into my lifestyle. For example, I routinely offer clients a fixed appointment day and time every week, even when it may be inconvenient for me. We observed how different this is in the coaching world where coachees are assumed to be psychologically robust and have expectations of a coach that are in line with other professional services (75).

Of course, this case study has made me consider very carefully how it would be to switch seeing Bett from a coachee to a therapy client. We had one mutual contact to consider. I asked Bett to think about how she would feel about this connection and whether (although I felt confident about assuring her of confidentiality) she might *imagine* confidentiality might be compromised (75).

I made a decision that if the mutual contact and I ever found ourselves in group supervision together, I would make sure I did not bring my work with Bett to these sessions. I also made clear to Bett that I would need to re-start the alliance and re-contract with her as her therapist, starting with an initial 75-minute consultation going through a detailed set of questions about different aspects of her life and what she would like to gain from therapy. She agreed this made sense. We also agreed it

would suit us both to have a reasonable gap before we re-started work together to bring a further sense of closure to the coaching work. I discussed all this in supervision and agreed these kinds of decisions will come up from time to time and will always need to be considered on a case-by-case basis (78, 79, 80).

5. Reflection on practice and impact on future practice and relation to coaching theory

I have already described in Section 4 above how I will incorporate many of the learning points from this case study into my coaching practice. I will suggest to coachees that we go around the wheel of life twice, first briefly to get a sense of where their priorities lie and then a second time in greater detail. I will also plan to allocate all or most of meeting 1 to this review (78, 94).

My meetings with Bett occurred both face to face and over Skype, depending on her schedule. I realised that although meeting in person was good, it only felt essential for the first 1-3 meetings. Once the relationship was established, we both found that meetings on Skype worked very well. In fact, meetings using focusing oriented coaching techniques were particularly effective on Skype. I also found that, unlike in therapy, gaps of 3-4 weeks were not a problem. We were able to pick up efficiently and reconnect with the threads of the work. Indeed, meeting weekly quickly became unnecessary because Bett saw she needed time between meetings to digest and action the results (78).

I have learnt that I can be more flexible with my coaching appointments than I would with my therapy diary, as long as I can maintain trust and rapport in the coach coachee relationship and a professional, ethical framework (78, 79, 80).

6. Conclusion

I learnt much from working with Bett and judging from her feedback to me, I can see that our meetings helped her to progress towards her goals much more productively as a result of our work.

I became confident in using the TGROW model, both within a single session and across several sessions to work on a meta-goal. I learnt how to apply it as a flexible framework within which I could offer Bett a lot of freedom in which to think carefully about her issues.

I also had a chance to learn about other tools like the wheel of life and scaling.

I saw that coaching relies just as much as therapy on being able to maintain a trusting, authentic and ethically based relationship. I learnt how to set up an ethically sound coaching agreement to underpin our work.

I experienced both face to face and Skype work with Bett and saw that, after the first few meetings, coaching can be adapted very effectively to different media and meeting frequencies.

I found working towards Bett's coaching goals challenging at times because they were often intangible and shifted from week to week as she moved through different stages trying various solutions. I saw how important it was for Bett that I remained supportive and encouraging of her efforts, based on a sincere belief in her ability to make positive change. I await to see how the next stage of our work together will unfold.

7. References

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