

A decorative graphic consisting of several thin, white, curved lines that sweep across the top of the page, separating the blue header from the white content area.

HENNEPIN COUNTY  
MINNESOTA

# Introduction to Health Coaching

# Agenda

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Why we need health coaches

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Best approach to health coaching

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Tools to use while coaching

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Stages of change theory

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Documentation

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Discuss scenarios

# Training Curriculum

By Tom Bodenheimer and CEPC Team



# Why do we need health coaches?

- Providers have limited time for on-going healthy lifestyle coaching.
- Patients want to get healthier because of COVID risks.
- Changing behavior is not easy and can take time.
- Frequent follow up is effective.

# Health coach or mentor

Think about a coach or mentor that has influenced your life.

Write down the characteristics of this coach or mentor.

# Motivational Interviewing

What do you know  
about MI?

# Motivational interviewing principles

We are conflicted.

We want to change, but ....

What motivates the patient to make a change?

Advising and prescribing may work,  
but ...



# Advise and prescribe

- Works for many kinds of health conditions (infections, wound care, etc.).
- Specific questions get important information.
- May not help with setting healthy lifestyle goals to improve health.

“Take these medications, lose weight on this diet, start getting more exercise.”


# Ask-tell-ask

- Ask open-ended questions to find out what health concerns patients worry about.
- Ask to find out what they know.
- Then tell patient important health information they may not know about.
- Ask another open-ended question to see if they understand the information, and if they have any thoughts about change.




# Health Coaching Open- Ended Questions

## **General Open-ended Questions:**

- What is your number one health concern?
  - What do you know about improving your health?
  - What makes it difficult for you to take care of your health?
  - How can I help you improve your health? What do you believe you can do to improve your health?
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# Health Coaching Open- Ended Questions

## **Open-ended Questions for Diabetes, BP, and Lipids:**

- What do you think you are doing that makes your blood sugar, BP, lipids high?
  - What ideas do you have that could keep your blood sugar, BP, lipids stable?
  - What has worked for you in the past?
  - What do you think might get in the way?
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# Health Coaching Open- Ended Questions

## **Open-ended Questions for Weight Loss:**

- What behaviors have you thought about changing?
- Why do you think we care about your weight?
- What do you think you are eating/drinking that is making your weight go up?

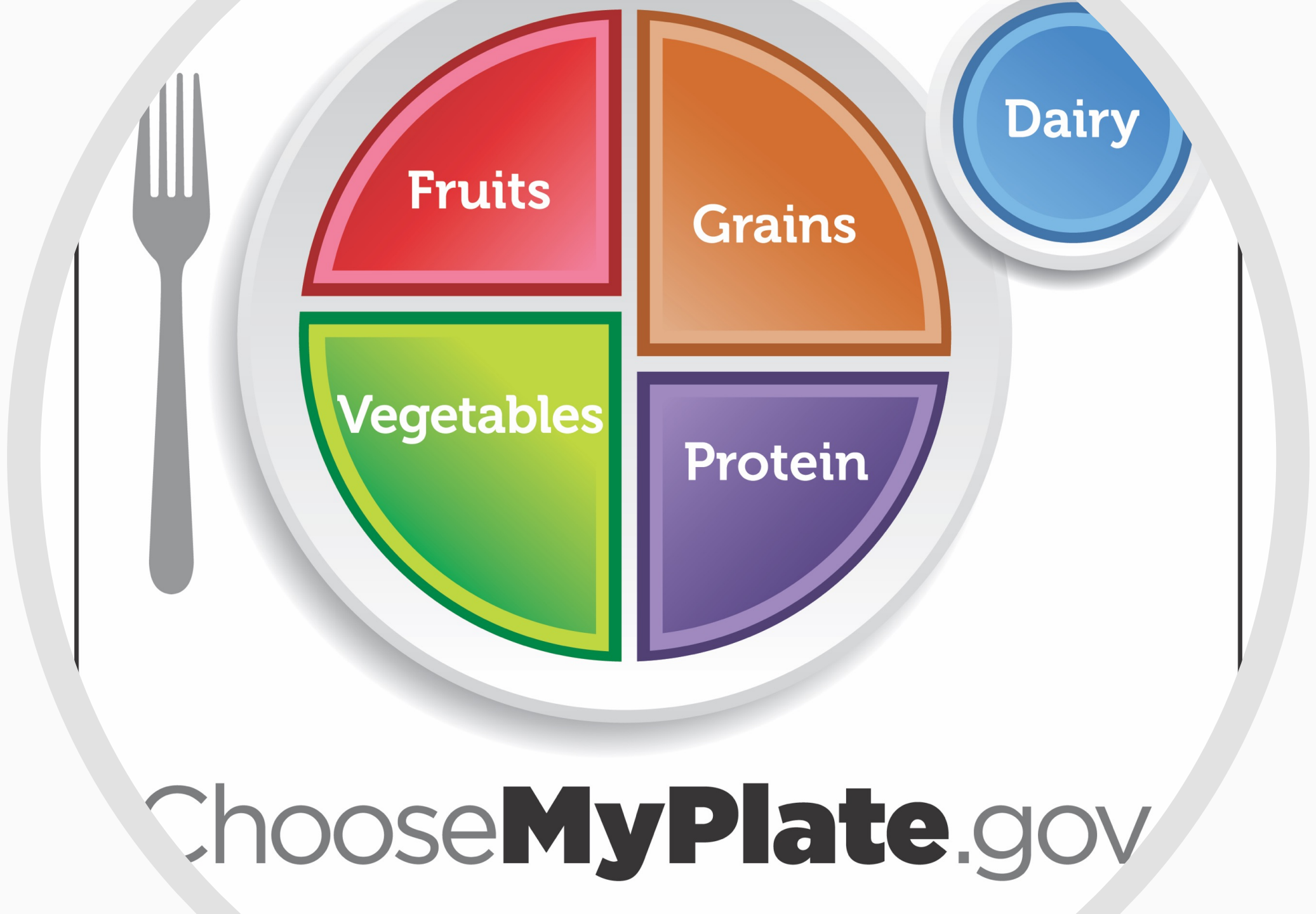
Reference- University of California, San Francisco





# The Four Questions

1. What do you know about ...?
2. Where are you?
3. What is goal/normal?
4. How can you get there?



Fruits

Grains

Dairy

Vegetables

Protein

Choose **MyPlate**.gov



## A portion controlled plate includes:

**1/2** Vegetables  
& salad

**1/4** Good  
quality protein

**1/4** Complex  
carbohydrates

- Plus a small serving of healthy fats -



# Stages of Change

- **Pre-contemplation:** Unaware, in denial, doesn't see it ...
- **Contemplative:** Ambivalent, unsure, sees issue but isn't ready ...
- **Preparation:** Decided "Yes, I'm ready!" See action plan.
- **Action:** Doing it!
- **Maintenance:** Living it!

# Pre-contemplative

## Strategy

- Build relationship
- Explore patient's perceptions of health and condition
- Get a reaction, cognitive or emotional
- Help them think about it

## Questions

- What would you like to know/learn about your condition?
- What behaviors have you thought about changing?
- What do *you* feel affects your health?

# Contemplative

## Strategy

- Explore pros and cons/likes and dislikes of behavior
- Help to weigh pro side of change
- What are their barriers?

## Questions

- What are benefits of making a change?
- What's a small(er) step that you feel you can achieve?
- What's a replacement activity (or food) that might be helpful?

# Ready for Action or Preparation

## Strategy

- Support-recognize challenge
- Identify on benefits, motivations, and inspirations  
“look how far you’ve come!”
- Problem-solving

## Questions

- Four questions
- Use action plan form
- Confidence scale

# Action

## Strategy

- Support-recognize hard work
- Explore benefits, motivations, and feelings of having made change
- Problem-solving

## Questions

- How does enacting this change feel?
- Are there any challenges you are encountering or anticipate?
- How have you celebrated your success?

# Maintenance

## Strategy

- Support-recognize daily work
- Find other supports
- Become a role model to others

## Questions

- What helps you be successful in maintaining this change?
- What are you doing to keep from going back to your hold habit(s)?
- Who (or what) supports you to maintain this change?

# MY ACTION PLAN

DATE: \_\_\_\_\_

I \_\_\_\_\_ and \_\_\_\_\_  
have agreed that to improve my health I will:

## 1. Choose ONE of the activities below:



\_\_\_\_\_ Work on something that's bothering me:  
\_\_\_\_\_



\_\_\_\_\_ Stay more physically active!  
\_\_\_\_\_



\_\_\_\_\_ Take my medications.  
\_\_\_\_\_



\_\_\_\_\_ Improve my food choices.  
\_\_\_\_\_



\_\_\_\_\_ Reduce my stress.  
\_\_\_\_\_



\_\_\_\_\_ Cut down on smoking.  
\_\_\_\_\_

## 2. Choose your confidence level:

How sure are you that you can do the action plan? (if < 7, then change plan)



10 VERY SURE

7 SURE

5 SOMEWHAT SURE

0 NOT SURE AT ALL

## 3. Fill in the details of your activity:

What: \_\_\_\_\_  
\_\_\_\_\_

How much: \_\_\_\_\_

When: \_\_\_\_\_

How often: \_\_\_\_\_

Where: \_\_\_\_\_

With whom: \_\_\_\_\_

Start Date: \_\_\_\_\_

Follow-Up Date: \_\_\_\_\_

Best Way to Follow-Up: \_\_\_\_\_

## Action Plan Calendar

Draw a **O** in the box for the days that the action plan was set. If the goal for that day is reached, draw a check **✓** in the circle.

	Mon	Tue	Wed	Thurs	Fri	Sat	Sun
Week 1							
Week 2							
Week 3							
Week 4							
Week 5							
Week 6							
Week 7							
Week 8							

Did you face any challenges doing this plan? If yes, explain below.

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# Action Plan

## MY ACTION PLAN

DATE: \_\_\_\_\_

I \_\_\_\_\_ and \_\_\_\_\_  
have agreed that to improve my health I will:

### 1. Choose ONE of the activities below:



\_\_\_\_\_ Work on something that's bothering me:



\_\_\_\_\_ Stay more physically active!



\_\_\_\_\_ Take my medications.



\_\_\_\_\_ Improve my food choices.



\_\_\_\_\_ Reduce my stress.



\_\_\_\_\_ Cut down on smoking.

### 2. Choose your confidence level: How sure are you that you can do the action plan? (if < 7, then change plan)



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Week 1							
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Week 4							
Week 5							
Week 6							
Week 7							
Week 8							

Did you face any challenges doing this plan? If yes, explain below.

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# Example Goals

## **Cut down on my smoking:**

- I will smoke 3 less cigarettes per day starting tomorrow for the next week. I will ask my friend for support and use a nicotine patch daily.
- I will call the Quit Partner line on Friday on my lunch hour to find more information on using a coach for support.

## **Improve my food choices:**

- I will bring my own lunch to work twice this week, Tuesday and Thursday, instead of going to a fast-food place.
- I will eat one more vegetable five days this week at lunch or dinner. I will go shopping with my daughter to pick out the vegetables together.
- I will drink one less soda four days this week, Monday through Thursday. Instead, I will drink tea or sparkling water.

# Example Goals

## **Stay more physically active:**

- I will practice yoga/stretching/strengthening exercises for 10 minutes, three times this week on Monday, Thursday, and Saturday after dinner with my friend.
- I will walk for 15 minutes three days this week over my lunch hour on Monday, Wednesday, and Friday with a co-worker.

## **Take my medications:**

- I will set my alarm to remind me to take my evening medication at 8 p.m. five days this week.
- Tomorrow at 6 am, I will set my morning medications close to the coffee maker as a reminder.
- On Friday over my lunch hour, I will call my provider to check on my medication refills and talk about the side effects.

## Entering Patient Centered Goals

*Ambulatory*

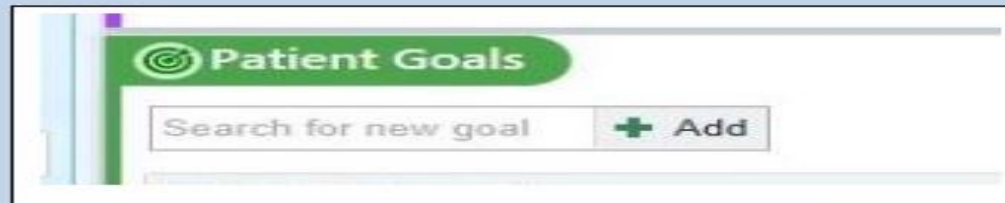
**Epic TIPS & TRICKS**

1. In the **Rooming** tab, scroll to **Patient Goals**



2. Click **+Add** tab to open Goal Template List.

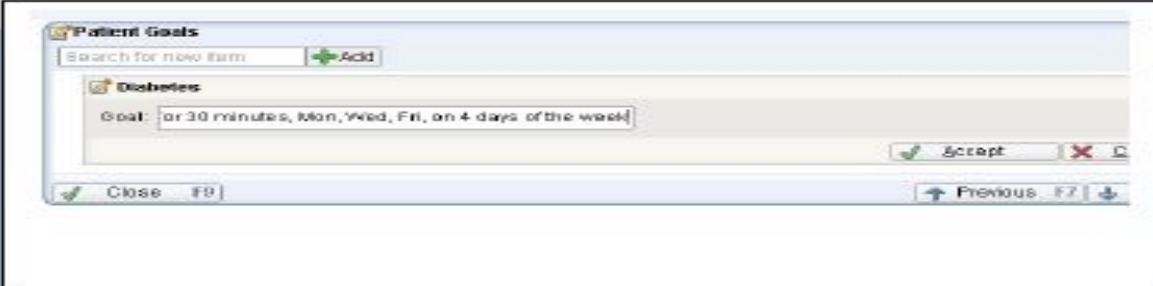
3. Select Goal from list or "Other".



Goal Template Name	Goal Template ID
APPOINTMENTS (CUSTOMIZE)	1345
BP <140/90	1322
CALC LDL <100	1327
CD4	1347
CHEMICAL HEALTH (CUSTOMIZE)	1342
DENTAL (CUSTOMIZE)	1344
DEVELOPMENTAL SERVICES (CUSTOMIZE)	1337
DIABETES - (CUSTOMIZE)	1331
EDUCATION (CUSTOMIZE)	1368
FINANCES	1376
FOOD (CUSTOMIZE)	1343
HGB A1C	1326
HIV (CUSTOMIZE)	1340
HIV + RRA	1353
HOUSING (CUSTOMIZE)	1332
HYPERTENSION (CUSTOMIZE)	1333
LDL (MEASURED) <100	1342
LEARNING (CUSTOMIZE)	1368
LEGAL (CUSTOMIZE)	1360
LUNG DISEASE (CUSTOMIZE)	1324
MEDICATION (CUSTOMIZE)	1367
MENTAL HEALTH (CUSTOMIZE)	1330
NUTRITION (CUSTOMIZE)	1323
OTHER (CUSTOMIZE)	1335
PHYSICAL ACTIVITY - (CUSTOMIZE)	1366
REPRODUCTIVE HEALTH (CUSTOMIZE)	1369
SAFETY (CUSTOMIZE)	1359
SOCIAL SUPPORT (CUSTOMIZE)	1336
TRANSPORTATION (CUSTOMIZE)	1338
VASCULAR DISEASE (CUSTOMIZE)	1339
WEIGHT	1341
WORK (CUSTOMIZE)	1361

# Entering Patient Centered Goals

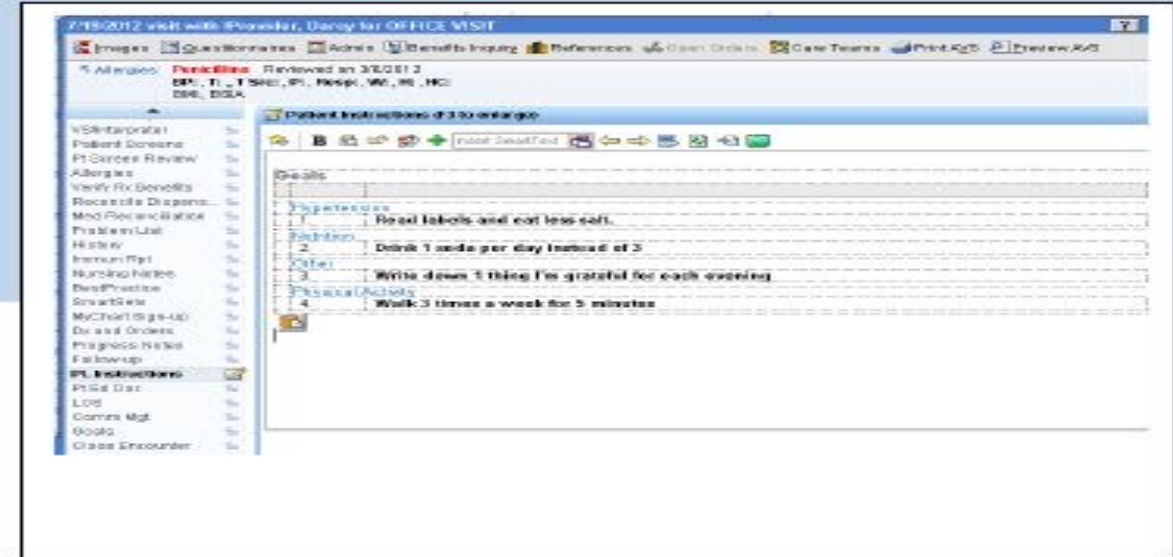
5. Type details of goal (delete words Customize), and click **Accept**.



6. At Follow Up visit, under **Goal Met as of this Visit**, click Yes or No.  
7. To add new goal, click **+Add** tab again.



8. Add Goal to Pt Instructions using smartphrase: **goalspatient**  
  
All the patient's goals will be included.





# Scenario

- Client is a 65 year old male and smokes 2 ppd. He has reluctantly agreed to a coaching phone call but shows resistance to change as he says he has tried many times and thinks he will never be able to quit. His family is pressuring him to meet with you.

# Scenario

What stage of change is this client?

- A. Pre-contemplation
- B. Contemplation
- C. Preparation
- D. Action
- E. Maintenance

# Scenario

What is your first approach?

- A. Let him know his health risks at his age if he continues to smoke.
- B. Ask him what steps he would like to take to start cutting down smoking.
- C. Ask him what changes he's thought about making regarding his health.





# Scenario

- Client is 58 yo female who is obese and has prediabetes. She was shocked at her weight gain and diagnosis since her last visit a year ago. She voiced some change talk and said she had been reading about eating a whole foods diet that her friend started and was losing weight.

# Scenario

What stage of change is this client?

- A. Pre-contemplation
- B. Contemplation
- C. Preparation
- D. Action
- E. Maintenance

# Scenario

What is your first approach?

- A. Ask her what her number one health concern is.
- B. Use the four questions on eating healthy.
- C. Ask her if there are any challenges she is encountering or anticipating.

# Closing the loop/teach back

## Suggested Phrases to Close the Loop:

- “Just to make sure we are on the same page ...”
- “I want to make sure I was clear ...”
- “So I know that I made sense ...”

# Setting the agenda

- **Steps to setting the agenda:**
  - Ask the patient what he/she wants to discuss.
  - Retell what the patient wants to discuss.
  - Tell the patient what you want to discuss.
  - Ask the patient if it is OK to talk about their concerns and then your concerns.

# Sample health coaching

## Setting the agenda:

- [Setting the Agenda \(VIDEO\) | Center for Excellence in Primary Care \(ucsf.edu\)](#)

# Questions



# Health Coach Newsletter

Quarterly newsletter  
with tips on these  
principles





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Hennepin County Public Health

