




CASE STUDY

THE POWER OF PERSONALISED COACHING

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- **Employer:** UK wealth management firm
 - **Learner:** The apprenticeship coincided with what the learner calls “the most turbulent period of my personal life.”
 - **Outcome:** Distinction

This case study focuses on an individual financial adviser apprentice whose journey was anything but straightforward. Their apprenticeship coincided with one of the most turbulent periods of their personal life, and despite challenges, they achieved a distinction.

Study for professional qualifications happens in real life – not a vacuum.

As a training provider, we know that adult learners returning to professional education bring valuable strengths, including rich real-world experience, strong motivation, and a clear sense of purpose that often enhances their engagement and problem-solving abilities. The challenges they face are rarely about academic ability; far more often, they stem from balancing study with work and family commitments, managing confidence, or navigating personal circumstances that compete for time and focus.

This can present real costs to the individual and the business, both time and financial. Our learner entered the programme with the usual pressures of a professional apprenticeship: balancing a fulltime role, meeting regulatory expectations, and producing a high-quality portfolio. What made the difference was the relationship that developed with their coach.

From the outset, the learner describes their coach as a “rock-solid source of guidance, information and support.” She became the learner’s consistent reference point throughout the apprenticeship being approachable, knowledgeable, and deeply invested in their success.

But the journey wasn’t smooth. The apprenticeship coincided with what the learner calls “the most turbulent period of my personal life.” This created real challenges in maintaining focus, motivation, and performance.

The learner talks about their coach, with extraordinary appreciation: her professionalism, her attention to detail, and her genuine care for their success. What’s powerful is how the coach adapted her approach to the learner’s personality, giving them exactly the level of structure, challenge, and support they needed. The learner explicitly links the coach’s attention to detail and guidance to achieving a distinction.



PRACTICALITY:

Structured portfolio checkpoints, clear expectations, and coach expertise directly influence success. What stands out here isn't just the distinction outcome, it's the impact of truly personalised coaching. The learner highlights how much they valued the regular touchpoint and even missed them afterwards.

PRACTICALITY:

Predictable, relationship based coaching helps learners stay confident and on track. This case study shows us something important: high-quality coaching isn't just about delivering content. It's about building a relationship that motivates, guides, and ultimately elevates the learner's performance. An apprenticeship allows employers to ensure Learners are supported throughout by a dedicated coach, with structured 12-weekly catch-ups involving the learner, their line manager, and the coach, ensuring progress, alignment, and support.

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CASE STUDY

 **Davies**