Evidence Base
The Wellcoaches Coaching Protocol

Prepared by Gary A. Sforzo, PhD
Wellcoaches Research Advisor
The Wellcoaches Protocol was developed 2000-2009 by a team of 10 Wellcoaches faculty and published in the Coaching Psychology Manual since 2009
Wellcoaches Corporation dedicated to health/well-being coaching

- **SCHOOL** trains health/well-being coaches
- **HEALTHCARE** enables the coach in healthcare
- **NETWORK** matches well-being coaches with clients

Wellcoaches School established in 2002 – trained over 14,000 in 50 countries and certified over 3,000 coaches

2009-2020
Established the Wellcoaches protocol extensively studied in 22 peer-reviewed studies

22 studies in multiple populations, locations, settings
- Obese, diabetic, heart disease risk factors, cancer, fibromyalgia, lifestyle medicine, wellness, heart disease risk factors, smoking cessation, burnout
- Hospital, primary care, community clinics, employee wellness program
evidence base for the Wellcoaches protocol

22 peer-reviewed research studies
of 194 coaches working with
30,984 patients/clients
delivering 128,076 coaching sessions
between 2009-2020
all showing beneficially positive and statistically significant outcomes
Wellcoaches Protocol - Evidence Summary

• 22 outcomes studies published in scientific journals – 2009-2020
• 194 coaches, 30,984 patients/clients, 128,076 coaching sessions
• ALL studies showed beneficially positive and statistically significant outcomes
• multiple applications
  • obesity, diabetes, heart disease risk factors, lifestyle medicines, wellness, cancer, fibromyalgia, smoking cessation, physician burnout
• multiple locations
  • Tennessee, California, Michigan, Pennsylvania, North Carolina, Ohio, Pacific Northwest, Massachusetts, Minnesota, New York, Maryland, Montana, Georgia, Missouri, Utah, Ireland
• multiple improvements in life quality
  • e.g. healthy eating, exercise, physical functioning, self-compassion, mindfulness, positivity, self-efficacy
• multiple real-world settings
  • primary care, clinics, hospitals, medical fitness facilities, employer wellness
### Wellcoaches Protocol – The Numbers

#### Summary of research studies published in scientific journals

<table>
<thead>
<tr>
<th>Category</th>
<th># Studies</th>
<th># Sessions</th>
<th># Clients</th>
<th># Coaches</th>
<th>Key Outcome</th>
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<td>714</td>
<td>89</td>
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<td>Reduced disease burden</td>
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<td><strong>Totals</strong></td>
<td><strong>22</strong></td>
<td><strong>128,076</strong></td>
<td><strong>30,984</strong></td>
<td><strong>194</strong></td>
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</table>

- **Summary:**
  - **Total studies:** 22
  - **Total sessions:** 128,076
  - **Total clients:** 30,984
  - **Total coaches:** 194
Patients/clients (N = 30,984) coached using the Wellcoaches Protocol

- Diverse populations
  - Healthy as well as Obese, Diabetic, Cancer and Fibromyalgia
  - Minority, Middle-aged, Elderly, Low income, and Rural

Coaches (N = 194) trained by Wellcoaches

- Diverse backgrounds including
  - Dietitians, psychologists, exercise physiologists, nurses, doctors, medical assistants
  - All trained, many certified through Wellcoaches

- Effective Complementary Protocol used in combination with
  - Health-care team, software app, nutritional supplement, medical fitness program

Coaching Sessions (N = 128,076) using the Wellcoaches coaches and protocol

- Vastly applied in real-world settings
- Most widely research-tested Coaching Protocol
- Delivered in-person and remotely
Research applying the Wellcoaches Protocol

- Obesity
- Diabetes
- Heart Disease Risk Factors
- Lifestyle Medicine Wellness
- Burnout
- Cancer Fibromyalgia
Obesity & Weight Management

Five Research Studies
## Obesity and Weight Management Studies of Wellcoaches Protocol

<table>
<thead>
<tr>
<th>Citation</th>
<th>N</th>
<th>Weeks of Coaching</th>
<th># Sessions</th>
<th>Results</th>
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<tr>
<td>Mettler et al. (2014)</td>
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<td>12</td>
<td>Lower BMI</td>
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<td>Sherman et al. (2017)</td>
<td>271</td>
<td>52</td>
<td>11</td>
<td>Lower Weight</td>
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<tr>
<td>Hildebrandt et al. (2020)</td>
<td>114</td>
<td>12</td>
<td>8</td>
<td>Less Binge Eating</td>
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<td>Schwartz (2013)</td>
<td>1</td>
<td>52</td>
<td>12</td>
<td>Cancelled Bariatric Surgery</td>
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<tr>
<td>Tucker et al. (2008)</td>
<td>53</td>
<td>16</td>
<td>11</td>
<td>Lower Weight</td>
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</table>
Mettler et al (2014)

• Employees (N = 177) in a worksite wellness program
• 12-week program with weekly coaching sessions
• Managing or losing weight surveyed as number one priority
• 12 weeks of coaching:
  • Improved readiness to change behavior
  • Increased motivation and confidence for sustaining healthy weight, healthy eating, physical activity, and achieving life satisfaction
  • Lowered weight and BMI

CONCLUSIONS
The Wellcoaches protocol was effective at improving motivation for behavior change and BMI.

Sherman et al (2017)

- Obese patients (N = 271) at a primary care setting at Massachusetts General Hospital
- Averaged 11 coaching sessions in first year
- ~7% weight loss at 1 year
- >5% weight loss (clinically significant) sustainable at two years
- Estimated cost of coaching program under $300

CONCLUSIONS
Primary-care integrated coaching by Wellcoaches-trained coach resulted in significant weight loss in overweight and obese adults.

Hildebrandt et al (2020)

- Patients (N = 225) with diagnosed binge eating disorder
- 8 coaching sessions (n = 114) over 3 mo plus use of self-monitoring app (Noom)
- Reduced binge-eating days and greater remission than std care
- Reduced eating disorder symptoms and adverse behaviors sustained beyond coaching period to one-year measurement

CONCLUSIONS

- Wellcoaches-trained coaches effectively incorporated other treatment aids (CBT and Noom app) into their standard coaching practice.
- Coaching can sustainably help those with Binge-eating Disorder.

Schwartz (2013)

- Case study: morbidly obese individual scheduled for bariatric surgery
- Monthly coaching sessions with Wellcoaches-trained RD, and monthly visits with MD
- at 3 mo: lost 30 lbs; exercising 60 min/day; didn’t need cane
- at 3 mo: Cancelled bariatric surgery
- at 12 mo: lost 120 lbs; at 24 mo: lost 240 lbs

CONCLUSIONS

- A treatment team (Wellcoaches-trained RD and MD) can work together and help a morbidly obese patient achieve robust results.
- Case studies are frequently written off as nominal scientific evidence, but results such as these are noteworthy.


- Overweight or obese patients (N=120) treated with Coaching and/or Supplement
- Four months of coaching (n = 53) sessions (11 for 30 min ea) and/or; Daily supplement
- Significant Weight (and Body Fat) loss evident with Coaching or Supplement

CONCLUSIONS

- Best results were seen in group having both Coaching and Supplement.
- With smartphone use being commonplace a phone coaching strategy makes sense.

Wellcoaches Protocol Improves Obesity

Wellcoaches Protocol

Obesity

BMI

Motivation

Avoid Surgery

Improve Healthy Behaviors
- More exercise
- Better food choices
- Less binge eating

Settings
- Primary Care
- Hospitals
- Employee Wellness
- Community Clinics
Summary: Obesity & Weight Management

Wellcoaches-trained coaches
• Consistently help patients meet weight management goals
  • Increase internal motivation, achieve weight loss, avoid surgery
  • Minimize binge-eating symptoms and habits

Work successfully when
• Integrated into healthcare teams
• Used in conjunction with mobile apps
• Combined with prescribed supplements

Functions well in
• Primary Care settings
• Hospitals
• Employee Programs
• Community Clinics
Diabetes

*Four Research Studies*
## Diabetes – Four Research Studies

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<td>87</td>
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<td>McGloin (2015)</td>
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<td>Berman (2018)</td>
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<td>20</td>
<td>7</td>
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Ahn et al (2018)

- Low-income obese and diabetic adults (N = 149) in a community setting
- 12 monthly sessions (n = 87) with a Wellcoaches-trained coach
  - (meetings also with registered dietitian and exercise physiologist)
- Clinically significant improvement in A1C
- Also significant improvement in:
  - Weight, BMI
  - Diabetes knowledge

CONCLUSIONS

- Multi-component program can combat obesity and diabetes in low-income adults.
- Wellcoaches-trained coaches can be integrated onto a lifestyle medicine team.

CONCLUSIONS
Coaching proved a well-accepted, effective, and low-cost tool for healthcare workers.

Berman et al (2018)

- Recruited volunteers (N = 118) diabetic patients located remotely throughout US
- Treatment paired Wellcoaches-trained coaches with a mobile phone app
  - app emphasized meal preparation, weight monitoring, and scheduling of coaching calls
- Coaching involved 30-min phone meetings every two weeks for three months
- A clinically (and statistically) significant drop in A1C
- Decrease in medication use
- Greater patient confidence for management of their disease

CONCLUSIONS
Coaching combined with a “digital therapeutic” was highly beneficial to diabetic patients.
Prediabetic patients (N = 17) aged 32 – 71 years at Massachusetts General Hospital
Averaged 7 sessions with a Wellcoaches-trained coach over 5 months
Significant drop in A1C
Significant drop in body weight
Significant results were maintained at the two-year time point

CONCLUSIONS

- It is not common for A1C to improve, or weight to drop, spontaneously over 2-year period.
- Supports coaching effects in diabetic patients from a broad segment of age spectrum.

Wellcoaches Protocol Improves Diabetes

Settings
- Primary Care
- Hospitals
- Community
Summary: Diabetes

Wellcoaches-trained coaches

- Help diabetic patients with treatment goals
  - Reductions in A1C
  - Drop in medication use
  - Loss of body weight
  - Greater patient confidence and self-efficacy for disease management

Work successfully when

- Integrated into healthcare teams
- Used in conjunction with mobile apps

Can function well in

- Primary care settings
- Hospitals
- Community settings
Lifestyle Medicine, Wellness & Heart Disease Risk Factors
Ten Research Studies
# Lifestyle Medicine and Heart Disease Risk Factor Studies

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<tr>
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<td>Improved fitness</td>
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<td>Long et al. (2016)</td>
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<td>Roy et al. (2018)</td>
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<td>Sforzo et al. (2014)</td>
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<td>Mielenz et al. (2020)</td>
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<td>24 (group)</td>
<td>Improved Functioning</td>
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<td>Eisenberg et al. (2017)</td>
<td>40</td>
<td>15</td>
<td>7-8</td>
<td>Improved Biometrics</td>
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Rivera et al (2018)

- Studied over 5,000 Army community members (i.e., soldiers and their families)
- Participants in Army Wellness Program- assessments, health education, and health coaching
- Recommended health coaching once monthly over 3-12 months
- Participants experienced:
  - Significant decline in BMI (n = 2509; number with follow-up tests)
  - Significant improvement in cardiorespiratory fitness (n = 110)
  - Significant decline in blood pressure (n = 1909)
  - Significant decline in perceived stress (n = 342)

CONCLUSIONS

- Large-scale project with excellent results even though participants were fairly young (34 y) and generally healthy at baseline
- Demonstrates integration of Wellcoaches coaching team in a wellness program benefitting risk factor profile
Long et al (2016)

- Employee population (N = 25,504) of international health care organization
- Wellcoaches-trained coaches of diverse backgrounds
  - (e.g., registered nurses, registered dietitians, exercise physiologists, certified diabetes educators)
- Delivered 90,298 one-hour coaching sessions
- Coached employees had better improvements across all outcomes
  - Biometric, psychometric, and behavioral ....99 outcomes measured

CONCLUSIONS

- Greatest engagement with Wellcoaches-trained coaches had the best results.
- Huge project, demonstrating health-benefiting power of the Wellcoaches Protocol.

- Medical Fitness Program integrating Wellcoaches-trained coaches
- Patients (N = 1306) with chronic diseases referred by their physicians
- Coaching combined with exercise program over three months
- Improved nutrition and exercise habits
- Lowered body weight, blood pressure, anxiety, pain levels
- Enhanced positivity scores and quality of life scores

CONCLUSIONS
Integrating Wellcoaches Protocol into a Medical Fitness Program yielded highly beneficial results for a diverse patient population.


Lifestyle Medicine and Heart Disease Risk Factors
Edman et al (2019)

- Study of 54 healthcare workers (aged 53 y) with at least one heart disease risk factor
- Three months and at least six coaching sessions by Wellcoaches –trained coaches (sole intervention)
- Improved biometric outcomes (reduced weight, blood pressure)
- Improved psychometrics outcomes (stress, fatigue)
- More lifestyle medicines (increased exercise habits)

CONCLUSIONS
Working with At-Risk Patients the Wellcoaches Protocol (as sole intervention) yielded excellent results.

Sforzo et al (2014)

- Studied a university-based employee population (N = 272)
- Provided extensive wellness program including access to Wellcoaches coaching services
- Weekly coaching sessions over 3-6 months (n = 203)
- Health risk appraisal showed significant improvements and health benefits
  - Improved fitness, nutrition, safety and lowered body weight
- Only those with coaching saw
  - Significantly decreased blood pressure in normo- and hypertensive individuals

CONCLUSIONS
- Coaching well integrated into a highly successfully employee wellness program.
- Clear added benefits (reduced blood pressure) due to a coaching effect driven by the Wellcoaches Protocol.

Guthrie et al (2019)

- Stage 2 hypertensive patients (n = 172) recruited via Facebook
- “digital therapeutic” – mobile app plus six coaching sessions with Wellcoaches-trained coaches
- Blood pressure decreased in six weeks
- Average 17 mmHg drop in systolic pressure for hypertensive adults

CONCLUSIONS
- Authors attributed this clinically relevant finding to behavior changes resulting from regular use of the “app“ and coaching sessions.
- Wellcoaches Protocol teams well with mobile apps.

Sforzo et al (2014)

- Hospital-based study of patients using tobacco (N = 161)
- 6-8 coaching sessions over 3-months led by Wellcoaches-trained coaches
- Quit rate of nearly 90% (intent-to-treat over 50%) at the six-month time point (3-mo after coaching ended)

CONCLUSIONS
- Coaching helped with cessation of smoking, a particularly difficult to quit addictive behavior.
- Large-scale application of coaching intervention might reduce the individual and societal burdens associated with tobacco use.


- Patients (aged 52 y; N = 42) at University of Michigan’s health clinic
- Wellcoaches-trained coaches (medical assistants) offered 6-8 coaching sessions over three months to improve exercise, nutrition, or sleeping habits
- Improved waist circumference, BMI, and minutes of physical activity
- Improved sleep, stress, and fatigue scores

CONCLUSIONS
- Program was health and wellbeing coaching alone
- Health coaching can be cost-effective method for improving patient health, and reducing physician time spent counseling patients

Mielenz et al (2020)

• Study of wellness in urban-dwelling group of older adults (aged 73 y; N = 121)
• Self-regulation education (e.g., chronic disease information) for all
• Half cohort (n = 56) randomly assigned to weekly group coaching for six months
• Those receiving coaching reported greater physical functioning than control

CONCLUSIONS
Coaching provided a booster to physical functioning of older adults
analyses of risk factors in middle-aged employees of the Culinary Institute of America
- Average age 48 y; N = 40
- culinary education (5 h/week) plus health education for 14-16 weeks
- Wellcoaches coaches provided 2-3 coaching sessions/mo for 14-16 weeks
- significant post-program decreases in BMI, waist circumference, systolic and diastolic blood pressure, and total cholesterol

CONCLUSIONS
Combining wellness coaching with intensive cooking/nutrition education substantially improved risk factor profile in middle-aged employees over 3-4 months

Wellcoaches Protocol improves Risk Factors & Lifestyle Medicine

Heart Disease Controllable Risk Factors

Wellcoaches Protocol

Improve Healthy Behaviors
- More exercise
- Better food choices
- Better Sleep

Lower blood pressure

Smoking cessation

Less Stress/Anxiety

Greater Physical Activity

Lower weight/BMI

Settings
- Hospitals
- Employee Wellness
- Community Clinics

Lifestyle Medicine and Heart Disease Risk Factors
Summary: Lifestyle Medicine & Heart Disease Risk Factors

wellcoaches-trained coaches support population wellbeing
  • across the age spectrum
  • in minority groups
  • in soldiers and their families
  • for employees in a large international company

function effectively in a broad range of settings
  • military (Army)
  • employee wellness program
  • medical fitness program
  • urban and rural communities

improve clinical outcomes
  • body weight
  • blood pressure
  • pain
  • anxiety and stress
  • tobacco use
  • lifestyle medicines (e.g., eating and exercise habits)
Cancer, Fibromyalgia, Burnout

*Three Research Studies*

• Thirty cancers patients (20 breast; 7 prostate; 3 colorectal) recruited from 3 states
• Six telephonic coaching sessions over three months using Wellcoaches-trained coaches
• Patients followed for one year
• Significant improvements in depression and anxiety scores
• Significant improvements in exercise readiness and quality of life

CONCLUSIONS
• Results considered sustainable though slightly diminished on one-year follow-up.
• Follow up study needed; with more intense coaching, this intervention might prove life-altering for these patients.

- Pilot study of nine female fibromyalgia patients - Ohio State University Health Clinic
- Deep immersion into coaching treatment - 12 months with Wellcoaches-trained coaches
  - Personal coaching every two weeks
  - 18 group coaching sessions
- Reported less pain (scores reduced by 30% or more)
- Reduced usage of health care services (about 80%)
- Significant drop (35%) in their FIQR score (measure of fibromyalgia burden)

CONCLUSIONS

- Patients had greatly improved quality of life and reduced healthcare utilization
- Health coaching be further investigated as a primary intervention for fibromyalgia patients

Primary Care Physician Burnout – McGonagle et al (2020)

- Physicians (N = 59) recruited from four medical practices in Boston area
- Randomized and Controlled study with follow-up measures
- Six coaching sessions from team of coaches (3/5 were Wellcoaches–trained)
- Reduced scores of burnout (n = 50 - complete data available)
- Improved work engagement and job satisfaction scores
- Improved psychological capital (resilience, hope, optimism, and self-efficacy)
- Sustained benefits reported at three months after coaching

CONCLUSIONS

- Healthcare worker burnout is a huge problem (especially given COVID pandemic); Physicians are especially affected
- Coaching is an important intervention for physicians minimizing burnout effects that impact doctor, patient and healthcare

Two Medical Societies recommend the Wellcoaches Protocol

American College of Lifestyle Medicine

• endorses Wellcoaches coach training/certification programs and coaching protocols for health professionals including physicians

American College of Sports Medicine

• endorses Wellcoaches coach training/certification programs to promote health and wellbeing for exercise physiologists

Publications recommend the Wellcoaches Protocol

- **Wellcoaches training recommended for other credentialed health professionals**
  - Wellcoaches training for personal trainers (Petite et al., 2013)
  - Wellcoaches training for fitness professionals (e.g., exercise physiologists) (Roy et al., 2014; Sforzo et al., 2015)

- **Wellcoaches training recommended for practicing healthcare professionals (nurses, RDs, etc.)**
  - Allow application of coaching principles within their normal scope of practice
  - Means to provide coaching exposure a greater segment of the patient population potentially yielding enhanced treatment benefits

### Compendium of Peer-reviewed Research of the Wellcoaches Protocol

#### Citations - OBESITY

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#### Citations - DIABETES

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#### Citations - BURNOUT

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#### Citations - LIFESTYLE

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#### Citations – CANCER & FIBROMYALGIA

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  • obesity, diabetes, heart disease risk factors, lifestyle medicines, cancer, fibromyalgia, smoking cessation, physician burnout
• multiple locations
  • Tennessee, California, Michigan, Pennsylvania, North Carolina, Ohio, Pacific Northwest, Massachusetts, Minnesota, New York, Maryland, Montana, Georgia, Missouri, Utah, Ireland
• multiple improvements in life quality
  • e.g. healthy eating, exercise, physical functioning, self-compassion, mindfulness, positivity, self-efficacy
• multiple real-world settings
  • primary care, clinics, hospitals, medical fitness facilities, employer wellness
The Wellcoaches Protocol of health/well-being coaching is the most thoroughly tested coaching protocol in the healthcare and wellness domains, resulting in beneficial and positive, statistically significant outcomes in all 22 peer-reviewed studies.