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## Analysis of Zero Balancing Case Studies through an Occupational Therapy Lens

Deanna Waggy OTR, MSA, CZB, CSLA

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## Analysis of Zero Balancing Case Studies through an Occupational Therapy Lens

### Cover Page Footnote

Thank you to Veronica Quarry, MS, MSPT and Amanda King, MA, LMT for your vision to collect and edit this book of case studies. Thank you to each practitioner and client represented in the 25 case studies for taking time to document the outcomes of Zero Balancing sessions. Deep gratitude to Fritz F Smith, MD for your gift to the world.

## Analysis of Zero Balancing Case Studies through an Occupational Therapy Lens

Zero Balancing (ZB) is an effective mind body manual therapy system, developed by Dr Fritz Smith in the early 1970's to bridge the gap between his training in osteopathic medicine and acupuncture. This technique uses a special type of touch along key joints at the bone level of the body to release chronic tension and blocks to the body's energy flow. Zero Balancing is based on a wellness model and helps improve overall health and wellness. Initially called Structural Acupressure, it was later named after a client sat up from the treatment table and announced that they felt "zero balanced" like the center point of a set of balance scales (ZeroBalancing.com, 2020)

"Zero Balancing can help relieve body aches and pain, release restrictions in movement, and provide lasting relief from emotional distress to improve overall quality of life. Zero Balancing can also be helpful with specific goals such as relief from back pain, improving concentration or sleep, releasing unwanted stress, eliminating old behavior patterns, or boosting well-being. Zero Balancing works in conjunction with medical therapy and is not a substitute for it."

(ZeroBalancing.com, 2020 para. 2)

Does Zero Balancing positively impact occupational performance? This is a question many Occupational Therapists (OTs) ask when first learning about Zero Balancing (ZB). A recent article in this journal explored the principles of Zero Balancing through the lens of the Kawa Model used as a frame of reference for Occupational Therapy (OT) practice (Waggy & Waggy, 2021). While it reviews principles of Zero Balancing (ZB) and makes a strong case for using ZB in OT treatment, it does not directly document actual examples of improved performance.

In order to answer this question, I wanted to see if there were direct references to improvement in occupational performance following Zero Balancing treatment. Most of these case studies were not performed in an OT treatment session and those who submitted case reviews were not prompted to comment directly on occupational performance. This is a retrospective review of case studies through the lens of Occupational Therapy.

One of the stated purposes for the creation of this book was to begin establishing evidence-based outcomes of Zero Balancing (ZB) as the entry level process of scientific inquiry. Occupational Therapists primarily use scientific and evidence-based treatments which directly relate to a client's occupational performance. So how do these case studies show that ZB can actually improve occupational performance? It is important for OTs see a direct connection between the documented ZB treatment and the improvement in the client's occupational performance in each of these case studies. Each case study does clearly mention an improvement in at least one area of occupational performance. This

suggests OTs may benefit from training in the basic ZB protocol for use as a treatment modality within an OT treatment session to achieve similar improvements in occupational performance. The growing evidence is that ZB has a positive impact on occupational performance regardless of whether ZB is used as the ends (final outcome) and/or the means (process to reach the goal) for improved occupational performance.

It is important to start with a review of the American Occupational Therapy Association (AOTA) documents which define occupation and the OT domain of practice. Each case study was reviewed using an OT lens to connect categories which are part of OTs domain of practice with occupation, so OTs see the distinct value of incorporating ZB into OT practice.

*“Occupations are the everyday activities that people do as individuals, in families, and with communities to occupy time and bring meaning and purpose to life. Occupations include things people need to, want to and are expected to do. Occupations are categorized as activities of daily living, instrumental activities of daily living, health management, rest and sleep, education, work, play, leisure, and social participation.” American Journal of Occupational Therapy (2020).*

It was discovered all the case studies in this book mention at least one of the categories of occupations. Some are more obvious than others. By organizing the case studies into categories using the above OT terminology of occupations, there are clear examples of how a person’s everyday activities (occupations) were impacted in a positive way in each case study. Areas that would typically be addressed in an OT treatment were also identified within the stories such as functional movement, interoception (internal awareness), sensory integration, emotional regulation and self-awareness, even if they were not necessarily described with OT terminology.

Listed below is a summary of the **Occupations** and treatment categories with the actual number of case studies in parenthesis that directly mention these categories. Many of the 25 case studies might have improvement in areas that were not documented, since the authors were not directly focusing on documenting each of these specific aspects of the client’s story. In the future, it would be interesting to have a uniform report form to document how a person’s functional lifestyle and well-being improved.

**Activities of Daily Living (ADL)** refer to basic activities that have to do with taking care of your body such as bathing (1), dressing (2) and eating (2). Another important area under ADLs is functional mobility, which is defined as navigating from one position/place to another. OTs working in this area work with gait/walking (10) during functional activities as well as stability/grounding (12), balance (8),

postural alignment (11), fluidity of movement (12), joint mobility (11), range of motion (5) and coordination (3).

**Instrumental Activities of Daily Living (IADL)** are activities that support daily life within the home or community. This includes caring for the home (3), caring for others (3), caring for animals (3), community activities (3), and safety maintenance such as fall risk prevention (3). Another important IADL is the practice of spirituality (13).

**Rest and Sleep** is considered an occupation, including the ability to relax and quiet the mind (13) and improved ability to obtain restorative sleep (6). Improved participation was noted in **Education/School** (1) and **Work** (14) which also includes non-paid purposeful activities performed as a volunteer or during retirement. **Play and Leisure** (11) are non-obligatory activities that are intrinsically motivated during discretionary time, such as biking, hiking, dancing, skiing, reading, visual arts, creativity and other activities for the purpose of enjoyment or entertainment.

**Social Participation** refers to engagement in activities with successful interaction with others in person and/or through technology. Multiple case studies mentioned improved relationships with others (14) and improved ability to communicate (5).

**Health Management** focuses on maintaining health and wellness, which is a significant area of positive impact from a ZB treatment. This includes stress management (9), symptom/pain management (22), managing trauma (12) and using ZB regularly as a form of self-care (11). Also documented were the impact on physical functions of the body related to improved breathing (6), reduced tension (17) and improved biofield/energy levels (16).

Examples of managing emotional wellness (17) included regulation of anger (2), doubt (1), fear (5), grief (5), guilt (2), anxiety/panic (3), depression (4) and emotional pain (7). ZB also amplified emotions of joy (4), love (3) and gratitude (3). Examples of managing mental wellness (7) included conscious awareness related to personal transformation (15), quality of life (17) and self-realization (13).

Also under health management is the OT domain of sensory integration to help regulate proprioception or position in space (9), body awareness (16) and sensory regulation (3). Interoception, which is the sensory awareness of inner states within the body (15), can also include improved mind-body connection (14), embodiment (11), increased vitality (11) and a sense of wholeness (8).

Viewing occupation in the case studies raises awareness of questions one might ask about functional performance during an initial intake session and pre/post treatment to provide objective measurements. In the future, a 10-point scale could be used to rate areas such as perceived level of relaxation, level of tension in body, ability to achieve restorative rest, ability to regulate emotions, tolerance for prolonged postures during activities and perceived ability to participate in daily activities.

Why would an OT want to use ZB as part of their treatment with clients? This analysis of the case studies through the lens of Occupational Therapy shows a direct link between Zero Balancing treatment and a positive impact on the client's occupational performance including functional mobility, improved conscious awareness of their whole being (body, mind, emotions and spirit) and improving overall health and wellness. This overview provides additional evidence beyond the contributor's recorded perspective of each story that ZB is an effective treatment tool which OTs can use with clients within their domain of practice to positively impact occupational performance.

In Table 1, every case study mentioned at least one area of occupational performance that was positively impacted. Most case studies had multiple references to occupations. Table 1 uses the Occupational Therapy Practice Framework as defined by the American Occupational Therapy Association (AOTA) listing the areas of life activities which people engage in. Column 2 identifies a category for how people perform or carry out the occupations while column 3 identifies the type of activities, skills or intervention an occupational therapist would address in a typical OT treatment session. The final column gives the page number of the case study which clearly mentions or identifies improvement in the item listed in column 3. Table 2 lists the outcomes following ZB sessions for each case study (see Tables 1 and 2 listed below).

Table 1. Comparison of occupational performance referenced in ZB case study book

<b>AOTA Occupations</b>	<b>Performance Category</b>	<b>OT Intervention/Training</b>	<b>Case Study Page #</b>
<b>Activities of Daily Living</b>	Functional mobility	Motor skills/range of motion	11,23,45,77,59
		Joint mobility/stability	11,15,23,31,35,45,59,61,77,85,91
		Stability/grounding	11,15,19,31,35,45,55,65, 77,81, 85,91
		Balance	7,15,19,31,35,55,77,81
		Gait/walking	7, 9, 11, 15, 19, 31, 35, 45,81,85
		Posture/alignment	7,9,11,17,19,23,25,69,77,85,91
		Freedom/ease/fluidity	11,15,23,31,35,45,59,69,77,81,85,91
		Coordination	19, 31,77
	Care for body	Dress, bath, eat	7,41,77
<b>Instrumental Activities of Daily Living</b>	Care for home	Yard work, garden, meals	11,15,77
	Care for others	Primary caregiver	31,69,81
	Care for animals	Barn chores, walk the dog	7, 9, 35
	Community life	Driving, exercise	15,31,49,69,77,81,85
	Practice of spirituality or religion	Spiritual growth, spiritual journey, inner awareness	15,23,25,27,41,45,65,73,81,85,91
		Activities: meditation, visualization	23,37, 55,73, 81, 85, 91
	Safety maintenance	Fall risk prevention	15,61,69
<b>Health Management</b>	Health and wellness routines	Stress management	15,25,31,37,41,49,65,77,81
		Regular ZB sessions	7,11,23,59,65,69,71,77, 81,85,91
	Sensory integration	Proprioception awareness in space	7,15,19,23,25,31,35,55, 77,81
		Body awareness	11,15,23,25,27,31,35,41,49,55,69,73 77,81,85,91
		Self-regulation	41,77,85
	Interoception; ie. my whole body feels alive and connected; more connected to self	Awareness of inner states within the body	7,23,25,31,35,37,41,45,49,69,73,77, 81, 85, 91
		Mind body connection	15,23,31,35,37,41,45,49,55,69,73,81 85,91
		Embodiment	9,11,23,25,31,35,69,73, 81,85, 91
		Vitality	11,15,23,35,41,49,69,73,81,85,91
		Wholeness	15,23,25,69,73,81,85,91
	Physical functions – body response to treatment, working signs	Respiratory, breathing	15,55,49,55,69,77,85
		Reduced tension with treatment	9,11,15,19,31,45,49,55,59,61,69,71, 73,77,81,85,91
		Biofield energy levels	11,23,27,31,35,37,41,45,49,61, 65, 69,71,77,81,85,91

	Mental wellness	Executive function, concentration, organization	19,41,77,81,91
		Processing/coping skills	31,73,77,81,91
	Global mental functions	Consciousness, wakeful state, alertness	7,15,25,37,41,49,65,73,77,81,85,91
		Personal growth, inner work, transformation	27,37,41,45,49,65,69,73,77,81,85,91
	Attitudes & beliefs	Quality of life	11,15,25,27,35,41,45,49,65,69,71,73,77,81,85,91
		Empowerment	31,35,41,45,49,73,81,91
	Emotional wellness	Emotional regulation	7,15,27,31,35,37,41,45,47,49,59,65,73,77,81,85,91
		Emotional pain	31,41,49,69,73,77,81,91
		Self-confidence, self-awareness, self-realization	19,27,31,35,37,41,45,49,65,73,77,81,85,91
	Symptom and condition management	Management of disease/symptoms	7,11,15,19,23,25,27,31,35,41,45,49,55,59,61,69,71,77,81,85,91
		Managing pain	11,15,23,31,35,45,55,59,61,69,71,77,81,91
		Managing trauma, abuse & loss,	27,31,41,45,47,49,69,71,73,77,81,91
<b>Rest and Sleep</b>	Ability to relax	Relaxation during treatment	7,9,31,11,49,77,81,85,91
		Quiet/calm the mind	9,11,15,19,41,49,73,77,81,85,91
	Sleep participation	Reduce sleep disturbance	11,15,31,61,77,91
<b>Work/volunteer, Education</b>	Participation in required activities	Improved performance	7,11,15,19,25,31,35,41,45,49,65,77,81
<b>Play &amp; Leisure</b>	Activities: driving, biking, dancing, skiing, reading, gardening, visual arts	Playfulness	9
		Resume participation	23,45,49,77,81,85,91
		Creativity	27,41,45,55,91
		Tolerance for prolonged postures (sit/stand)	15,77
<b>Social Participation</b>	Relationships	With other people	15,25,27,41,45,49,65,73,77,81,91
		With animals	7,9,35
		Ability to communicate	55,73,77,81,91

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Table 2. Impact of ZB session(s)

<b>Experiencing the Power of Zero Balancing: Case Studies of Journeys to Health and Wholeness</b>			
<b>#</b>	<b>Title/Author</b>	<b>Primary outcome following ZB session(s)</b>	<b>Page</b>
1	<b>No Longer Off Balance: Zero Balancing Offers Relief from Vertigo</b> by Elliot Abhau, BA, BS, MS, LMT, CZB	Balance and vertigo symptoms resolved with 1 session; Less worry about falling	7
2	<b>Acting as Witness for Tristan</b> by Elliot Abhau, BA, BS, MS, LMT, CZB	Horse with a club foot had more fluid gait, less skittish, increased calm and quiet during riding lessons	9
3	<b>Tracing Patterns of Pain</b> by Cindy Allred-Jackson, M.Ed, CMT, CZB	Released tension, improved sleep, leg pain and spasms decreased, improved posture, fluid neck motion, bright demeanor, return to moderate yard work	11
4	<b>Zero Balancing and Hope: Restoring the Enjoyment of Life</b> by Hadas L. Amiel, PT, LMT, CSLA, CZB	Decreased neuropathic pain, resumed normal activities and gardening, sitting tolerance for travel improved, depression resolved, felt rested and relaxed	15
5	<b>Measuring the Effect of Zero Balancing on Standing Balance</b> by Mary Behrens, PT, CZB	Increased confidence and more stable when walking at work, posture and balance significantly improved, resolved migraine associated vertigo	19
6	<b>The Effects of Zero Balancing on Avascular Necrosis</b> by Michele Doucette, BS, DC, CZB	X-ray revealed “fairly normal looking pelvis and hip” at 12 weeks with use of bone stimulator, visualization and ZB; resumed biking, dancing and skiing	23
7	<b>Receiving my First Zero Balancing</b> by Karen Gabler, BA, LMT, CZB	Improved body awareness and alignment with core self while navigating life changes in career and love	25
8	<b>Zero Balancing Leading to Emotional and Spiritual Creativity</b> with Testimony by Client, by Karen Gabler, BA, LMT, CZB	Increased serenity, energy, emotional and spiritual creativity, awareness and release of old archetypal patterns	27
9	<b>Zero Balancing for Mysterious One-Sided Body Pain</b> by Amanda King, MA, LMT, CZB	Tremors decreased substantially, speaking up for self, improved mobility, decreased numbness/tingling/pain, new body awareness, felt emotionally supported	31
10	<b>These Bones are Going to Rise Up</b> by Athena Malloy, LMT, CZB	Pain-free, no longer needs cane, patient and companion dog move easily up and down stairs	35
11	<b>Reading Emotions Through the Energy Body</b> by Jim McCormick, L.Ac. CZB	Released feeling of doubt, connected to core self to grow personally, released various emotions	37
12	<b>Transforming Childhood Abuse Trauma</b> with Testimony by Client, by Rosanna Price, BA, Adv.Lic.Ac, MBACc, CZB	Less depression and anxiety, suicidal feelings resolved, deep calm, improved happiness, more connected with life, profound experience of safe touch	41
13	<b>Releasing Guild and Transforming Relationships</b> with Testimony by Client, by Veronica Quarry, BS, MS, MSPT, CZB	Chronic pain in foot resolved, progressive freedom from restricted movement, new insights, forgiveness and love, improved relationships, released old trauma	45
14	<b>Releasing Pent Up Stress and Trauma with Surprising Result</b> with Testimony by Client, Veronica Quarry, BS, MS, MSPT, CZB	One time session released emotions of despair and fear, felt deep releases of old trauma, felt calm and euphoric, fidgeting and restless legs resolved, felt supported during transformation and self-realization	49
15	<b>Forging the Bones of the Earth</b> by Terry Lillian Segal, LMT, CZB	Supported breathing and dying process without need for words despite ALS, inspired creativity for legacy project, quieted nervous system, eased rib tension,	55
16	<b>Easing and Increasing Neck Range of Motion</b> by Maureen Staudt, BSN, RN, LMT, CZB	Improved shoulder and neck motion, moves with ease	59
17	<b>Pain in Legs that Affects Her Sleep</b> by Maureen Staudt, BSN, RN, LMT, CZB	Able to sleep through the night, decreased leg pain, improved neck motion, with regular ZB sessions the leg pain is either gone or not as bothersome	61

18	<b>Working with the Emotion of Anger</b> by Maureen Staudt, BSN, RN, LMT, CZB	Feels stress-free after ZB, not easily annoyed, family and peers notice less anger and “crabbiness”	65
19	<b>Chronic Pain from Old Injuries: A Client’s Testimony</b> by Judith Sullivan, BS, BCTMB, CST, CZB	Body feels more “normal”, jaw pain resolved, improved body alignment, released areas of pain from previous accidents, pain in ribs “gone from a roar to a whisper”	69
20	<b>Forty Years of Migraines from Hell: A Client’s Testimony</b> by Judith Sullivan, BS, BCTMB, CST, CZB	Intensity of migraines decreased, able to wean from medication, regained overall health despite chronic fatigue and fibromyalgia	71
21	<b>Zero Balancing Deepens the Spiritual Direction Experience</b> by Deanna Waggy, OTR, CZB	New insights and spiritual growth, deeper inner work while expanded awareness from ZB, increased vitality, released deep grief	73
22	<b>Zero Balancing with Asperger Syndrome/Autism Spectrum</b> by Deanna Waggy, OTR, CZB	Decreased intensity of migraines, improvements noted in sleep, self-care, social skills, concentration, coping skills, emotional stability, body awareness	77
23	<b>It’s OK to be ME?!!!</b> By Cassie White, PA, MT, CZB	More grounded and stable, improved relationships and quality of life, more aligned with life goals, life is easier	81
24	<b>Embodiment</b> by Todd Williams, CMT, CZB	Improved body-mind connection, felt more embodied, increased joy, more vitality, greater health, increased confidence and purpose in life	85
25	<b>Psychotherapy and Zero Balancing: A Potent Synergy</b> by Anne Wissler, LCSW, CMT, CZB	Sleep more soundly, increased sense of wholeness, relaxed, more grounded, improved self-awareness and compassion, greater access to creative inspiration, deep peace and joy, increased resilience and self-trust	91

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Deanna Waggy, OTR, MSA, CZB, CSLA has a passion for promoting excellence within Occupational Therapy, Zero Balancing and Soul Lightening Acupressure through public speaking, writing, mentoring and study groups. She has a private holistic wellness practice, spiritual direction and consultation in South Bend, Indiana. She also facilitates contemplative self-care retreats and online workshops. Deanna teaches Clinical & Process Acupressure classes for Soul Lightening International and is currently in Zero Balancing Teacher Training. DWaggy.com.

