

# Additional Coaching exercises

## Career, leadership & confidence

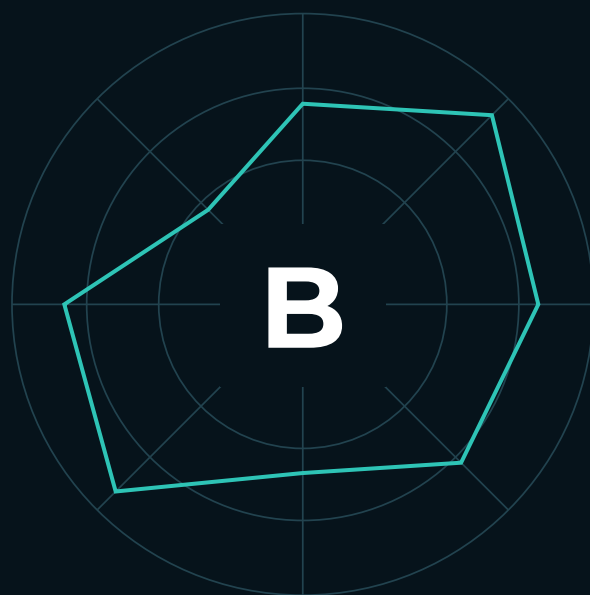
Examine the evidence. Extend your contribution. Make considered decisions.

# 32

**activities and practice resources**

Coach guides, working pages,  
results and debriefs

**MASTER PAGES 108-205**



# Make the evidence part of the conversation

A useful leadership conversation holds personal experience, other people's observations and organisational conditions together.

An executive may be deciding whether to seek a larger role, rebuild confidence after a setback or change an established way of leading. These are not identical problems. This guide offers ways to separate the career question from the capability question and both from the conditions in which the person is working.

Begin with examples. Ask what the client did, what happened and what others could reasonably have observed. Strengths become more useful when the client can describe where they help, where they are overused and what the situation requires. A development need deserves the same precision: name the behaviour and the context rather than turning it into a judgement about the person.

Feedback can widen the view, but it needs careful agreement. Be clear about the purpose, the participants and the way information will be handled. Treat differences between perspectives as material for inquiry. Do not assume that a higher rating is the truth or that a small set of comments represents everyone.

The confidence and decision activities invite the client to examine the rules, predictions and interpretations they are bringing to a situation. The intention is not to replace every uncomfortable thought with a positive one. Sometimes the concern is well founded. The useful question is what the available evidence supports, what remains uncertain and what can be tested responsibly.

Keep authority, opportunity and organisational constraints in view. A visibility problem may involve access to decision makers. A development gap may require practice, clearer expectations or resources. Coaching should help the client identify an appropriate response, including where a request or management decision is needed.

Close with a proportionate experiment: a conversation, a rehearsal, a feedback request or a different behaviour in a real meeting. Agree what to notice and when to review it. The aim is a better-founded choice and a broader range of useful action, not a polished account of an ideal leader.

## THE PRACTITIONER'S STANDARD

**Build confidence in a choice, not certainty about a label.**

# Introduction

This guide combines the career and leadership section with the confidence, beliefs and decisions section. Use it when the client needs a clearer view of role fit, contribution, strengths, development priorities or a decision that has become difficult to make. The activities work best when reflection remains connected to specific examples and the demands of the role.

01

## Understand the career question

Explore values, turning points, possibilities and what a future role would actually require.

02

## Develop leadership deliberately

Gather examples, consider feedback and choose a behaviour or capability to strengthen.

03

## Examine a decision

Separate observations from assumptions and test a limiting rule or a possible course of action.

### A SUGGESTED STARTING ROUTE

|         |                               |     |
|---------|-------------------------------|-----|
| ACE-D05 | Personal SWOT with evidence   | 121 |
| ACE-D15 | The leadership practice wheel | 151 |
| ACE-E06 | Four views of a decision      | 185 |
| ACE-E10 | Test a limiting rule          | 197 |

Do not use a wheel or reflective rating to rank executives or infer suitability for appointment. Start with the client's purpose, then decide whether a career map, feedback conversation, rehearsal or decision exercise is the better fit.

# Using this guide

Keep the coach guide, participant working page and debrief together.

## 01 / Select for the purpose

Agree what the client wants the conversation to enable. Read the whole activity, including its boundary notes and results page, before choosing it.

## 02 / Facilitate and record

Explain the task and offer an alternative. Use the original writing space, chart, wheel or map to capture the client's own observations.

## 03 / Debrief and test

Check the meaning of the record, choose a proportionate next step and agree what to review. An incomplete worksheet can still support a useful conversation.

## Participation and care

Invite the client to decline, pause or choose another approach. Do not require personal disclosure or use imagery to diagnose or treat distress.

## Evidence and ratings

Treat wheels and reflective scores as conversation aids, not selection tests. Separate what happened from what the client or coach inferred.

## Records and boundaries

Agree confidentiality and sponsor reporting. Use a client code where possible, approved storage and proportionate records. Use specialist support when the need exceeds coaching.

### FINDING A PAGE IN THE SPLIT EDITION

Original page numbers and ACE identifiers are retained. New opening pages use B-i, B-ii and so on. The original DIRECTORY footer now opens this guide's contents. Keep the six PDFs together for cross-guide links; support varies by reader. When a link does not open, use the suite map and retained master page number.

### RELATED MATERIALS IN THE SUITE

|         |                                               |     |
|---------|-----------------------------------------------|-----|
| GUIDE F | Expanded strengths questions                  | 523 |
| GUIDE F | Fresh-perspective questions                   | 525 |
| GUIDE F | Developmental feedback participant item sheet | 529 |

# The six-guide suite

Choose a guide by the work you need to do. Volume letters A-F identify the six books; the ACE codes retain the letters used in the original activity sections.

## GUIDE / FOCUS

## MASTER PAGES

|          |                                                                                          |                |
|----------|------------------------------------------------------------------------------------------|----------------|
| <b>A</b> | <b>Purpose, values &amp; goals</b><br>27 activities and practice resources               | <b>001-107</b> |
| <b>B</b> | <b>Career, leadership &amp; confidence</b><br>32 activities and practice resources       | <b>108-205</b> |
| <b>C</b> | <b>Action, productivity &amp; balance</b><br>40 activities and practice resources        | <b>206-328</b> |
| <b>D</b> | <b>Review, workshops &amp; reflection</b><br>33 activities and practice resources        | <b>329-435</b> |
| <b>E</b> | <b>Coaching practice &amp; business owners</b><br>20 activities and practice resources   | <b>436-502</b> |
| <b>F</b> | <b>Programmes, questions &amp; reference</b><br>Shared programme and reference materials | <b>503-652</b> |

## ALL 652 MASTER PAGES ARE RETAINED

Every page from the revised master appears in one guide only. The original front matter is at the end of Guide A. Original page artwork, worksheets and wording are preserved; each volume adds its own opening pages and navigation.

# Contents

Click an entry to open it. Activity and resource numbers below are the retained master page references.

| ACTIVITY / RESOURCE                         |                                                  | PAGE         |
|---------------------------------------------|--------------------------------------------------|--------------|
| Foreword                                    |                                                  | <b>B-ii</b>  |
| Introduction                                |                                                  | <b>B-iii</b> |
| Using this guide                            |                                                  | <b>B-iv</b>  |
| The six-guide suite                         |                                                  | <b>B-v</b>   |
| <b>D / Career, strengths and leadership</b> |                                                  | <b>108</b>   |
| <b>ACE-D01</b>                              | Career values and role fit                       | <b>109</b>   |
| <b>ACE-D02</b>                              | The career development wheel                     | <b>112</b>   |
| <b>ACE-D03</b>                              | Strengths with evidence and range                | <b>115</b>   |
| <b>ACE-D04</b>                              | Career possibilities inquiry                     | <b>118</b>   |
| <b>ACE-D05</b>                              | Personal SWOT with evidence                      | <b>121</b>   |
| <b>ACE-D06</b>                              | Agency at work                                   | <b>124</b>   |
| <b>ACE-D07</b>                              | Developmental feedback from several perspectives | <b>127</b>   |
| <b>ACE-D08</b>                              | Manage a development gap intelligently           | <b>130</b>   |
| <b>ACE-D09</b>                              | Twenty-five strengths inquiry questions          | <b>133</b>   |
| <b>ACE-D10</b>                              | The career history map                           | <b>136</b>   |
| <b>ACE-D11</b>                              | Map a future career landscape                    | <b>139</b>   |
| <b>ACE-D12</b>                              | An annual career development plan                | <b>142</b>   |
| <b>ACE-D13</b>                              | Career year at a glance                          | <b>145</b>   |
| <b>ACE-D14</b>                              | Quarterly career progress board                  | <b>148</b>   |

# Contents / 02

Click an entry to open it. Activity and resource numbers below are the retained master page references.

| ACTIVITY / RESOURCE                          |                                            | PAGE       |
|----------------------------------------------|--------------------------------------------|------------|
| ACE-D15                                      | The leadership practice wheel              | 151        |
| ACE-D16                                      | Leadership presence in behaviour           | 154        |
| ACE-D17                                      | A quality expressed more deliberately      | 157        |
| ACE-D18                                      | Business SWOT for an executive decision    | 160        |
| ACE-D19                                      | Make your contribution visible             | 163        |
| ACE-D20                                      | Find the strengths hidden in ordinary work | 166        |
| <b>E / Confidence, beliefs and decisions</b> |                                            | <b>169</b> |
| ACE-E01                                      | Thinking patterns: a reality check         | 170        |
| ACE-E02                                      | Choose the right degree of stretch         | 173        |
| ACE-E03                                      | Release, resolve or retain                 | 176        |
| ACE-E04                                      | Put the inner critic on paper              | 179        |
| ACE-E05                                      | Learn from a credible role model           | 182        |
| ACE-E06                                      | Four views of a decision                   | 185        |
| ACE-E07                                      | Reframe a limitation without denying it    | 188        |
| ACE-E08                                      | Borrow a mentor's perspective              | 191        |
| ACE-E09                                      | Control, influence and concern             | 194        |
| ACE-E10                                      | Test a limiting rule                       | 197        |
| ACE-E11                                      | Clear the mental workbench                 | 200        |
| ACE-E12                                      | Thirty-seven questions for a fresh view    | 203        |

## EDITION NOTE

Original activity identifiers retain their source-section letters D and E. Guide B is the new volume label; it does not replace the ACE activity codes.

# D

## Career, strengths and leadership

### ASSESS / ACTIVATE

Connect personal capability with the demands of real leadership work.

## 20

### ACTIVITIES AND PRACTICE RESOURCES

Coach guide → Participant working page → Results and debrief  
Select the tool that fits the purpose. Adapt it with the client.

A clear conclusion. A proportionate next step. Evidence worth reviewing.

# Career values and role fit

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Career choices involve more than capability and salary. This exercise identifies what a client wants work to provide and compares that with the realities of current or possible roles. It separates essential conditions from preferences and explores trade-offs without assuming that one ideal job can satisfy every value.

## FACILITATION SEQUENCE

- 1 Recall two work experiences that felt worthwhile and one that felt misaligned.
- 2 Identify the values or conditions present in each and define them in your own words.
- 3 Select up to eight priorities; distinguish essential conditions from preferences.
- 4 Compare the current role and one realistic alternative using evidence, not reputation alone.
- 5 Choose one condition to negotiate, one assumption to test or one development action.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Avoid interpreting values as a fixed career type or using them to exclude people from opportunities.

# Career values and role fit

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

Define each dimension before rating. Use N/A where evidence is unavailable.

**Career value**



**Personal meaning**



**Essential or preferred**



**Current role evidence**



**What I notice from the completed activity**

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**What I need to check or understand better**

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**My next step / evidence I will look for / review date**

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# Career values and role fit

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Role fit is contextual and can change over time.

Do not turn a values comparison into a numerical verdict that hides uncertainty.

A change within the current role may address the issue more effectively than a move.

## DEBRIEF QUESTIONS

- 01** What do you need work to provide at this stage of life?
- 02** Which condition is genuinely non-negotiable?
- 03** What trade-off are you willing to make?
- 04** What are you assuming about the alternative?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director values influence, learning and family stability. A larger regional role offers influence but uncertain travel demands. She gathers evidence about the travel pattern before treating the role as an obvious advancement.

## A NEXT-STEP EXPERIMENT

Test one important assumption through a role conversation or a short work observation.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R07](#) [R17](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C01, E24

# The career development wheel

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This wheel maps self-perceived readiness for a chosen role or career objective across eight practical dimensions. The client and coach may replace dimensions with verified role criteria. Ratings support evidence-based discussion; a smooth or large wheel is not a validated indicator of readiness.

## FACILITATION SEQUENCE

- 1** Name the role or objective and confirm the eight dimensions are relevant.
- 2** Define 0 as no current evidence and 10 as strong, recent evidence for the agreed requirement.
- 3** Rate each dimension, writing an example and marking unknown criteria as not yet verified.
- 4** Plot current ratings and desired evidence levels; discuss the most consequential gap, not merely the largest visual gap.
- 5** Choose one capability experiment and one requirement to verify with an informed person.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

This is not a selection assessment or an alternative to a validated competency evaluation.

# The career development wheel

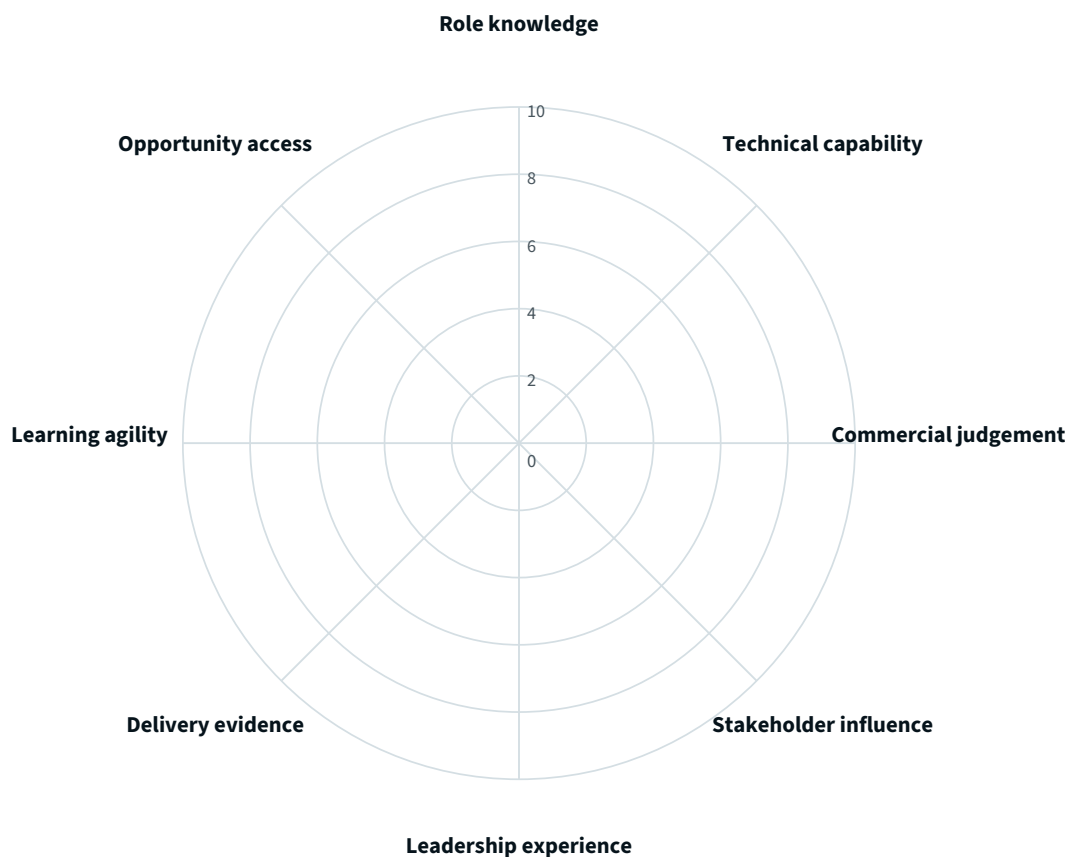
ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_



Current: solid line | Desired: dashed line (optional)

**Evidence behind my ratings / context**

\_\_\_\_\_  
\_\_\_\_\_

**Priority / uncertainty to explore**

\_\_\_\_\_  
\_\_\_\_\_

**My next step / evidence I will look for / review date**

\_\_\_\_\_

# The career development wheel

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Do not average the wheel into a readiness score.

Opportunity access is not a personal competency; keep that distinction visible.

Changes are interpretable only when dimensions and anchors remain comparable.

## DEBRIEF QUESTIONS

- 01** Which rating has the strongest evidence?
- 02** Which requirement needs verification?
- 03** Is the gap one of skill, experience or access?
- 04** What would stronger evidence look like?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A finance leader rates technical capability strongly but has little cross-functional delivery evidence. She chooses a business improvement assignment rather than another technical course.

## A NEXT-STEP EXPERIMENT

Collect one new work example for the selected dimension and review it against the same criterion.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R17](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C02

# Strengths with evidence and range

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

A strength is more useful when described as a behaviour that works in particular conditions than as a flattering label. This exercise identifies effective patterns, the value they create and the risk of overuse. It helps executives deploy strengths more deliberately rather than simply doing more of what comes naturally.

## FACILITATION SEQUENCE

- 1** Identify three recent situations in which your contribution helped produce a useful outcome.
- 2** Describe the behaviour you used and the evidence that it helped.
- 3** Look for a pattern across situations and name the strength in plain language.
- 4** Identify where the same behaviour could become excessive or poorly matched to the context.
- 5** Choose a new situation in which to apply the strength with an explicit boundary.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not assign a proprietary strengths type or claim this exercise measures stable traits.

# Strengths with evidence and range

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Effective situation

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## Behaviour used

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## Value created

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## Evidence and feedback

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## Overuse risk

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## Next application

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Strengths with evidence and range

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A positive result does not prove a strength; look for repeated evidence and context.

Distinguish enjoyment, skill and impact rather than assuming they always coincide.

Development can involve using a strength differently, not only more often.

## DEBRIEF QUESTIONS

- 01** What did you do that another person could observe?
- 02** When does this strength become less helpful?
- 03** What complementary behaviour does it need?
- 04** Where could it create more value?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader's decisiveness helps in incidents but closes discussion too quickly in planning meetings. She retains clear decision ownership while adding a deliberate option-generation phase.

## A NEXT-STEP EXPERIMENT

Apply one strength in a new situation and ask for feedback on both its benefit and its possible overuse.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R11](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C03, E17, Q05, IG04

# Career possibilities inquiry

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This reflective conversation helps a client generate career possibilities before narrowing to a plan. It combines interests, contribution, evidence and constraints. It is useful when someone knows they want change but has not yet distinguished dissatisfaction with a current environment from dissatisfaction with the work itself.

## FACILITATION SEQUENCE

- 1** Describe tasks and situations that attract you, including activities outside your current role.
- 2** Identify work you would like to do more of, less of or differently.
- 3** Explore contribution, learning, relationships and practical conditions rather than job titles alone.
- 4** Generate three plausible career hypotheses and list what you do not yet know about each.
- 5** Choose one low-risk exploration that can improve your understanding.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not advise resignation or major financial commitments without appropriate independent advice and a realistic plan.

# Career possibilities inquiry

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Option 1

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Career possibilities inquiry

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A career hypothesis is not a commitment.

Dissatisfaction may arise from workload, management or governance rather than the profession itself.

Include practical constraints without allowing them to censor all exploration.

## DEBRIEF QUESTIONS

- 01** Are you moving towards something or mainly away from something?
- 02** What have you enjoyed in more than one context?
- 03** Which possibility deserves evidence rather than fantasy?
- 04** What could you learn without making a major move?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A programme leader considering consultancy discovers that she mainly wants more diagnostic work and less recurring administration. She first explores a role redesign and a short internal advisory assignment.

## A NEXT-STEP EXPERIMENT

Conduct one informational conversation and record what you learned, what surprised you and what remains uncertain.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R17](#) [R18](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C04

# Personal SWOT with evidence

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This familiar four-quadrant heuristic separates internal resources and limitations from external opportunities and risks. It becomes useful when each entry is supported by evidence and converted into a choice. It is not a diagnostic instrument, and the quadrants should not be filled merely for visual symmetry.

## FACILITATION SEQUENCE

- 1** Define the objective and time horizon before generating entries.
- 2** List internal strengths and limitations using specific behavioural or capability evidence.
- 3** List external opportunities and threats, distinguishing facts from assumptions.
- 4** Create two strategic pairings: a strength to use with an opportunity, and a limitation or threat to address.
- 5** Choose an action and identify what information could change the analysis.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not present a personal SWOT as objective assessment evidence for employment decisions.

# Personal SWOT with evidence

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Strengths — internal

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## Weaknesses — internal

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## Opportunities — external

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## Threats — external

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Personal SWOT with evidence

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

SWOT organises thinking; it does not calculate the correct decision.

Avoid turning temporary limitations into identity labels.

External constraints require influence, negotiation or adaptation, not self-blame.

## DEBRIEF QUESTIONS

- 01** Is this truly internal, or is it a condition around you?
- 02** Which entry is least supported?
- 03** What combination suggests a useful move?
- 04** What would make this analysis outdated?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director combines strong operational credibility with an opportunity to lead a cross-functional project. A threat is reduced capacity during peak season, so she negotiates timing and support before accepting.

## A NEXT-STEP EXPERIMENT

Test the least certain high-impact entry and complete one action arising from a strategic pairing.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R03](#) [R17](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C05, E16, Q23

# Agency at work

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This exercise helps a client distinguish where they can act, where they can influence and where they need support or acceptance of a current constraint. It is useful when someone feels powerless, but it should not minimise genuine hierarchy, exclusion or unsafe working conditions.

## FACILITATION SEQUENCE

- 1** Describe one specific situation in which you feel you have little room to act.
- 2** Separate formal authority, informal influence, personal choices and external constraints.
- 3** Identify what information, relationship or permission could increase practical agency.
- 4** Generate one action within current authority and one request that requires another person's agreement.
- 5** Check risks, support and a review point before proceeding.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not encourage confrontation or disclosure that could expose the client to avoidable harm.

# Agency at work

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

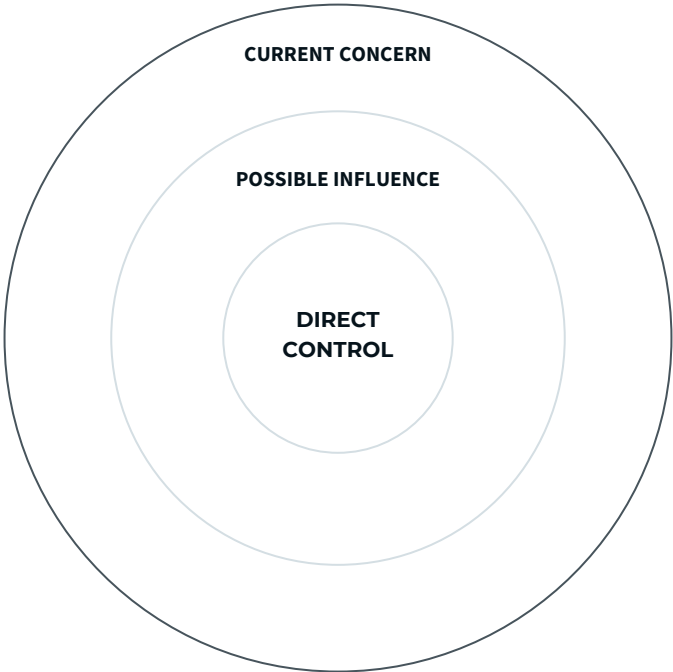
Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

Place factors in the rings.  
Explain why each belongs there.  
Consider what could move it.



**What I notice from the completed activity**

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**What I need to check or understand better**

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**My next step / evidence I will look for / review date**

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# Agency at work

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Agency is not the same as control over outcomes.

A realistic request for support may be more useful than a private coping strategy.

If the situation involves retaliation or harm, prioritise appropriate support and formal channels.

## DEBRIEF QUESTIONS

- 01** What can you decide without asking permission?
- 02** What can you request but not control?
- 03** Which constraint needs organisational action?
- 04** What would make a next step safe enough?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager cannot change a regional policy but can document its service impact, propose an exception process and request a review through the agreed governance route.

## A NEXT-STEP EXPERIMENT

Make one bounded request or take one authorised action and record the response without treating refusal as personal failure.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C06

# Developmental feedback from several perspectives

ASSESS / ACTIVATE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This original feedback exercise gathers specific observations from people who work with the client. It is a small developmental inquiry, not a validated 360 assessment. The client chooses a clear behavioural focus; respondents are told the purpose, intended use and limits of confidentiality before participating.

## FACILITATION SEQUENCE

- 1** Agree the development purpose, relevant behaviours and who will receive the report.
- 2** Select respondents with sufficient opportunity to observe; invite participation without pressure and explain that not observed is acceptable.
- 3** Use the eight original prompts or a clearly documented subset, asking for examples and suggestions.
- 4** Summarise each item separately, report the number of valid responses and remove identifying details with care.
- 5** Discuss patterns alongside context and choose one behaviour to practise; return to respondents with an agreed update.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Keep developmental feedback separate from undisclosed performance management. Use secure collection and agreed retention.

# Developmental feedback from several perspectives

ASSESS / ACTIVATE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

For the agreed observation period, rate each behaviour: 0 = never observed when relevant; 1 = rarely; 2 = sometimes; 3 = often; 4 = consistently. Use N/O when you lack a relevant opportunity to observe. Add an example.

| NO. | STATEMENT / QUESTION                                 | RATING               |
|-----|------------------------------------------------------|----------------------|
| FB1 | Makes the decision and its owner clear.              | <input type="text"/> |
| FB2 | Explains the reasoning behind important changes.     | <input type="text"/> |
| FB3 | Invites relevant views before deciding.              | <input type="text"/> |
| FB4 | Listens without interrupting or dismissing concerns. | <input type="text"/> |
| FB5 | Delegates with clear boundaries and support.         | <input type="text"/> |
| FB6 | Follows through on agreed commitments.               | <input type="text"/> |
| FB7 | Addresses difficulties respectfully and promptly.    | <input type="text"/> |
| FB8 | Uses feedback to make a visible adjustment.          | <input type="text"/> |

**Example of a behaviour and its effect (do not identify another respondent)**

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**What I notice / context behind my responses**

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**One useful next step or question to discuss**

---

# Developmental feedback from several perspectives

ASSESS / ACTIVATE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Use 0–4 item means only when at least three valid other-ratings exist; otherwise summarise examples without a mean.

Do not combine items into a leadership score or interpret self–other gaps as blind spots automatically.

Small groups and detailed comments may remain identifiable; never guarantee anonymity.

## DEBRIEF QUESTIONS

- 01** What pattern appears across examples, not only numbers?
- 02** Where do different groups see different situations?
- 03** What can you acknowledge without becoming defensive?
- 04** What specific change would respondents notice?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director rates decision clarity highly, while colleagues give mixed ratings. Examples show that decisions are clear in meetings but change afterwards without explanation. The action targets follow-up communication rather than general confidence.

## A NEXT-STEP EXPERIMENT

Practise the selected behaviour for four weeks and ask the same observers for fresh examples using the same wording.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R11](#) [R22](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C07

# Manage a development gap intelligently

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Not every weakness needs the same response. This exercise considers learning, support, redesign, partnership and reduced exposure before choosing a development strategy. It is useful when a client is spending disproportionate effort trying to become equally strong at everything.

## FACILITATION SEQUENCE

- 1** Define the gap as a behaviour or capability relevant to a real requirement.
- 2** Assess its consequence, frequency and the level of competence genuinely needed.
- 3** Generate options: learn, practise with support, use a tool, partner, redesign or delegate where appropriate.
- 4** Compare options for effectiveness, cost, fairness and residual risk.
- 5** Choose a strategy and define evidence that it is managing the gap adequately.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not use strengths language to excuse unsafe practice or failure to meet essential standards.

**ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

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

Focus / question / goal: \_\_\_\_\_

| What I notice from the completed activity | What I need to check or understand better |
|-------------------------------------------|-------------------------------------------|
|                                           |                                           |
|                                           |                                           |

**My next step / evidence I will look for / review date**

# Manage a development gap intelligently

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A development gap is not a global weakness of the person.

Delegation is inappropriate when it evades a core accountability or shifts an unfair burden.

The chosen response should match the consequence of error.

## DEBRIEF QUESTIONS

**01** How good do you actually need to be at this?

**02** Which part must remain your responsibility?

**03** What could a system or partnership solve?

**04** What risk remains after the chosen strategy?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader struggles with complex spreadsheet modelling. She learns enough to challenge assumptions, partners with an analyst for construction and uses a review checklist rather than pretending to be an expert modeller.

## A NEXT-STEP EXPERIMENT

Test the chosen strategy on one real task and review quality, effort and remaining dependency.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R08](#) [R03](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C08, E18, Q24

# Twenty-five strengths inquiry questions

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This question-led exercise helps clients identify strengths through evidence, feedback, learning history, energy and transfer. It is designed for people who find direct self-praise uncomfortable. The twenty-five original questions are grouped into five sets; use a small selection rather than a rapid questionnaire.

## FACILITATION SEQUENCE

- 1** Choose one set from the dedicated question bank: effective moments, others' observations, learning, energy or transfer.
- 2** Ask the client to answer with a specific example rather than an adjective.
- 3** Identify the behaviour that created value and the conditions that supported it.
- 4** Check for exceptions and overuse so the account remains balanced.
- 5** Choose one strength hypothesis to test in a new situation.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Use the linked expanded question bank; do not ask every question mechanically.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Do not reproduce or imply administration of a proprietary strengths assessment.

# Twenty-five strengths inquiry questions

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Question selected

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## Specific example

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## Behaviour identified

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## Conditions that helped

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## Possible strength

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## Next test

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## What I notice from the completed activity

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## What I need to check or understand better

---

---

## My next step / evidence I will look for / review date

---

# Twenty-five strengths inquiry questions

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

An enjoyable activity is not necessarily a strength; seek evidence of effectiveness.

A single compliment is a lead for inquiry, not a conclusion.

Use the client's language rather than assigning a type label.

## DEBRIEF QUESTIONS

- 01** What do people reliably ask you to help with?
- 02** What have you learned faster through practice?
- 03** Which effective behaviour have you dismissed as ordinary?
- 04** Where would this capability create value next?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive says she has no special strengths. Examples of colleagues asking her to untangle disputes reveal a repeatable ability to clarify interests and decisions. She tests this in a cross-team planning discussion.

## A NEXT-STEP EXPERIMENT

Gather two independent examples of the proposed strength and one example of a boundary or overuse risk.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R08](#) [R11](#) • Conceptual support; this original activity is not independently validated.

Inventory references: C09, FQ02

# The career history map

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This professional timeline examines role transitions, achievements, learning and changing conditions. Unlike a CV, it includes what the client learned and what each transition cost or enabled. The aim is to identify useful career patterns without treating the past as a fixed prediction of the future.

## FACILITATION SEQUENCE

- 1** Map up to eight roles, projects or transitions relevant to the current career question.
- 2** For each, note the work, conditions, contribution and learning.
- 3** Mark turning points where choice, opportunity or constraint changed direction.
- 4** Look for repeated sources of satisfaction and repeated difficulties, including exceptions.
- 5** Choose a pattern to retain and an assumption to test in the next transition.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

The client controls which chapters are included and what is shared.

# The career history map

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

|                                               |                                             |  |
|-----------------------------------------------|---------------------------------------------|--|
| <b>Earlier / context</b><br><hr/> <hr/> <hr/> | <b>Recent evidence</b><br><hr/> <hr/> <hr/> |  |
|-----------------------------------------------|---------------------------------------------|--|



|                                           |                                               |
|-------------------------------------------|-----------------------------------------------|
| <b>Turning point</b><br><hr/> <hr/> <hr/> | <b>Now / implication</b><br><hr/> <hr/> <hr/> |
|-------------------------------------------|-----------------------------------------------|

|                                                                 |                                                                 |
|-----------------------------------------------------------------|-----------------------------------------------------------------|
| <b>What I notice from the completed activity</b><br><hr/> <hr/> | <b>What I need to check or understand better</b><br><hr/> <hr/> |
|-----------------------------------------------------------------|-----------------------------------------------------------------|

**My next step / evidence I will look for / review date**  


---

# The career history map

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Do not equate promotion speed with capability or career quality.

A repeated difficulty can arise from repeated context, not a fixed personal defect.

Include caring responsibilities, mobility constraints or interrupted careers only when the client wishes.

## DEBRIEF QUESTIONS

**01** Which transition taught you most about how you work?

**02** What pattern disappears when the context changes?

**03** What opportunity did someone else make possible?

**04** What would you choose differently now?

## WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader notices that his most satisfying roles combined operational ownership with development of others. He uses this pattern to evaluate a prospective specialist role rather than assuming a larger title is better.

## A NEXT-STEP EXPERIMENT

Use one pattern from the map to frame a question about the next role or assignment.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R17](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E06

# Map a future career landscape

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

A career vision map organises possible contributions, environments and roles around the client's current position. It is deliberately broader than a single promotion route. It helps executives identify adjacent possibilities and the information needed to compare them.

## FACILITATION SEQUENCE

- 1** Place the current role at the centre and describe what you want more or less of.
- 2** Add three to five possible future roles, contributions or working arrangements.
- 3** For each, note attraction, capability demands, access conditions and uncertainty.
- 4** Draw connections where one experience could support several possibilities.
- 5** Choose the next exploration that provides the most useful information across the map.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not imply that all opportunities are equally accessible or that structural barriers are personal limitations.

# Map a future career landscape

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

**Support / challenge**

\_\_\_\_\_

\_\_\_\_\_

**Information / influence**

\_\_\_\_\_

\_\_\_\_\_

**ME / SHARED PURPOSE**

**Practical help**

\_\_\_\_\_

\_\_\_\_\_

**Reciprocity / next contact**

\_\_\_\_\_

\_\_\_\_\_

Use initials. Add connections and label the help, expectation or agreement.

**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

**My next step / evidence I will look for / review date**

\_\_\_\_\_

# Map a future career landscape

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A map of options is not a commitment to pursue all of them.

Access conditions may depend on organisational decisions, location or timing.

Prefer information-rich, reversible exploration before major change.

## DEBRIEF QUESTIONS

- 01** Which possibility is attractive for its work rather than its status?
- 02** What experience would keep several routes open?
- 03** Which option is based on an untested assumption?
- 04** What do you need to learn before narrowing?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A senior HR practitioner maps regional leadership, internal consulting and portfolio advisory work. A cross-country diagnostic project could build evidence useful for all three routes.

## A NEXT-STEP EXPERIMENT

Complete one exploration and redraw the map to reflect what is now known.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R17](#) [R03](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E07

# An annual career development plan

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This planner converts a career direction into a year of deliberate development, evidence and conversations. It differs from an annual performance plan by including capabilities and experiences needed for future contribution. It should remain useful even when a hoped-for vacancy or promotion does not occur.

## FACILITATION SEQUENCE

- 1** Clarify the future contribution and verify its most important requirements.
- 2** Select up to three development outcomes for the year.
- 3** Identify work assignments, practice, feedback and learning resources for each outcome.
- 4** Sequence the work by quarter and check capacity with current responsibilities.
- 5** Agree evidence to retain and the people with whom progress should be discussed.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Check access, fairness and workload before adding stretch assignments.

# An annual career development plan

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

|                                       |                                       |                                       |                                       |
|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| <b>Jan</b><br><hr/> <hr/> <hr/> <hr/> | <b>Feb</b><br><hr/> <hr/> <hr/> <hr/> | <b>Mar</b><br><hr/> <hr/> <hr/> <hr/> | <b>Apr</b><br><hr/> <hr/> <hr/> <hr/> |
| <b>May</b><br><hr/> <hr/> <hr/> <hr/> | <b>Jun</b><br><hr/> <hr/> <hr/> <hr/> | <b>Jul</b><br><hr/> <hr/> <hr/> <hr/> | <b>Aug</b><br><hr/> <hr/> <hr/> <hr/> |
| <b>Sep</b><br><hr/> <hr/> <hr/> <hr/> | <b>Oct</b><br><hr/> <hr/> <hr/> <hr/> | <b>Nov</b><br><hr/> <hr/> <hr/> <hr/> | <b>Dec</b><br><hr/> <hr/> <hr/> <hr/> |

**What I notice from the completed activity**

---

---

**What I need to check or understand better**

---

---

**My next step / evidence I will look for / review date**

---

# An annual career development plan

ASSESS / ACTIVATE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Development activity is not evidence of learning until it changes capability or work.

Do not count attendance at a course as completion of a behavioural outcome.

Keep the plan distinct from a promise of promotion.

## DEBRIEF QUESTIONS

- 01** What experience matters more than another certificate?
- 02** How will you demonstrate the learning in work?
- 03** Who can help without promising an appointment?
- 04** What remains worthwhile if the role does not open?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director wants broader commercial credibility. The plan combines participation in business planning, feedback from a finance partner and a completed options paper rather than a list of courses alone.

## A NEXT-STEP EXPERIMENT

Secure the first practice assignment and agree the evidence that will show learning.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R08](#) [R17](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E11

# Career year at a glance

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This one-page visual planner makes the timing of career-development commitments visible. It is a coordination tool rather than another goal-setting exercise. Use it after the annual development plan to prevent learning, major delivery deadlines and personal commitments from colliding unnoticed.

## FACILITATION SEQUENCE

- 1** Place fixed work and personal commitments on the year grid first.
- 2** Add the development outcomes and their important milestones.
- 3** Mark practice opportunities, feedback conversations and application or review dates.
- 4** Identify congested periods and dependencies; move or reduce work where necessary.
- 5** Set monthly check-ins and a quarterly decision about what to retain or revise.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not put confidential career intentions on a shared calendar without agreement.

# Career year at a glance

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

|                                       |                                       |                                       |                                       |
|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| <b>Jan</b><br><hr/> <hr/> <hr/> <hr/> | <b>Feb</b><br><hr/> <hr/> <hr/> <hr/> | <b>Mar</b><br><hr/> <hr/> <hr/> <hr/> | <b>Apr</b><br><hr/> <hr/> <hr/> <hr/> |
| <b>May</b><br><hr/> <hr/> <hr/> <hr/> | <b>Jun</b><br><hr/> <hr/> <hr/> <hr/> | <b>Jul</b><br><hr/> <hr/> <hr/> <hr/> | <b>Aug</b><br><hr/> <hr/> <hr/> <hr/> |
| <b>Sep</b><br><hr/> <hr/> <hr/> <hr/> | <b>Oct</b><br><hr/> <hr/> <hr/> <hr/> | <b>Nov</b><br><hr/> <hr/> <hr/> <hr/> | <b>Dec</b><br><hr/> <hr/> <hr/> <hr/> |

**What I notice from the completed activity**

---

---

**What I need to check or understand better**

---

---

**My next step / evidence I will look for / review date**

---

# Career year at a glance

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A crowded grid is not a sign of ambition well managed.

Differentiate fixed dates from provisional ones.

Use the planner to make trade-offs visible, not to create guilt about unfinished ambitions.

## DEBRIEF QUESTIONS

- 01** Where does the calendar assume unlimited capacity?
- 02** Which milestone depends on an earlier conversation?
- 03** What can be moved without losing the purpose?
- 04** What needs protection during peak periods?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader moves a major development assignment away from the annual budget cycle and replaces a second course with a focused mentoring conversation.

## A NEXT-STEP EXPERIMENT

Review the next month's commitments and remove or reschedule one avoidable collision.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E12, Q07

# Quarterly career progress board

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This board focuses the next quarter on a small number of career-development outcomes and visible evidence. It is useful between formal development reviews. The client tracks what has been attempted, what has been learned and what opportunity or support is still required.

## FACILITATION SEQUENCE

- 1** Choose up to three outcomes from the annual career plan.
- 2** Define a work-based proof point for each outcome.
- 3** Place actions in planned, in progress, evidence collected and reviewed columns.
- 4** Identify blocked actions and distinguish a personal next step from a request to someone else.
- 5** Review the board fortnightly and revise the plan when evidence changes.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

This is a personal development board, not a comparative talent ranking.

**ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

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

Focus / question / goal: \_\_\_\_\_

| What I notice from the completed activity | What I need to check or understand better |
|-------------------------------------------|-------------------------------------------|
|                                           |                                           |
|                                           |                                           |

**My next step / evidence I will look for / review date**

# Quarterly career progress board

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Movement across the board should reflect evidence, not optimism.

A blocked action needs diagnosis of the barrier, not automatic escalation of effort.

Keep fewer active commitments than the board can physically hold.

## DEBRIEF QUESTIONS

- 01** What evidence have you gained rather than activity completed?
- 02** What is blocked by access or timing?
- 03** What can be simplified this fortnight?
- 04** What learning changes the next step?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager moves “lead a cross-team meeting” into evidence collected only after obtaining observer feedback and reflecting on the decision process.

## A NEXT-STEP EXPERIMENT

Complete one proof point and review it with the agreed observer within two weeks.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E13, Q06

# The leadership practice wheel

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This original wheel supports a conversation about eight observable areas of leadership practice. It is not a competency test. The client should replace any dimension that does not fit the role and use specific examples to anchor ratings. The desired shape is not a perfect circle: priorities depend on the work.

## FACILITATION SEQUENCE

- 1** Confirm the role context and the relevance of the eight dimensions.
- 2** Rate current practice from 0, no useful evidence yet, to 10, consistent evidence in the situations that matter.
- 3** Record one example and one uncertainty for each selected dimension.
- 4** Plot a desired evidence level for the next review period and choose one priority.
- 5** Design a behaviour experiment and agree an observer or work artefact that can inform review.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

For formal competency assessment, use an appropriate validated or systematically developed instrument separately.

# The leadership practice wheel

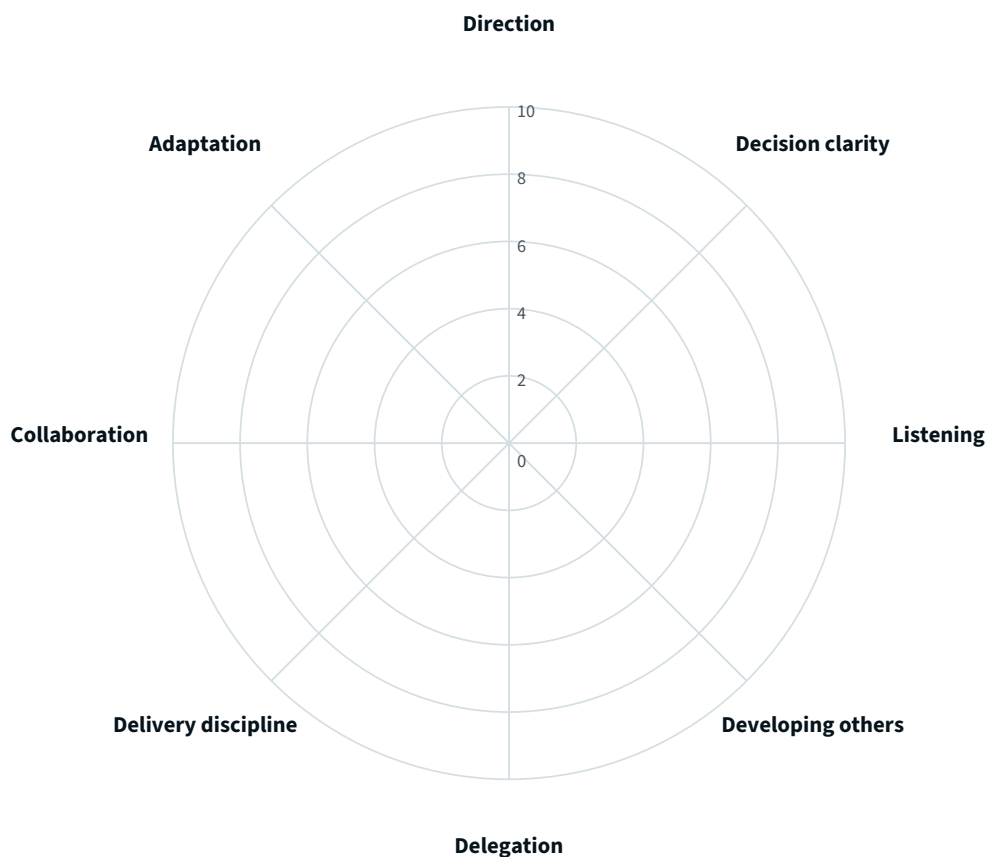
ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_



Current: solid line | Desired: dashed line (optional)

**Evidence behind my ratings / context**

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**Priority / uncertainty to explore**

---



---

**My next step / evidence I will look for / review date**

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# The leadership practice wheel

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Do not sum ratings or compare leaders using this wheel.

A low rating can mean little opportunity to demonstrate a behaviour, not low capability.

Use unchanged dimensions and anchors for meaningful personal review.

## DEBRIEF QUESTIONS

- 01** Which dimension matters most for your current challenge?
- 02** What supports the rating besides confidence?
- 03** Where do different stakeholders see different behaviour?
- 04** What would one practical improvement look like?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader selects developing others rather than her lowest-rated dimension because succession is the immediate organisational priority. She tests a monthly learning conversation with two team members.

## A NEXT-STEP EXPERIMENT

Practise the chosen behaviour twice and bring examples from both the client and an observer.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R11](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E19

# Leadership presence in behaviour

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Presence can become a vague label for style, charisma or conformity. This exercise makes it concrete by exploring the effect the client wants to have and the behaviours that support that effect. It should not encourage imitation of a dominant cultural or demographic leadership stereotype.

## FACILITATION SEQUENCE

- 1** Choose one situation in which your presence matters, such as a board discussion or difficult team meeting.
- 2** Describe the useful effect you want to have on the people present.
- 3** Identify behaviours in preparation, listening, speaking and follow-through that could support that effect.
- 4** Compare intention with available feedback and identify one mismatch.
- 5** Rehearse a small adjustment and agree how to obtain specific feedback afterwards.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Do not coach people to mask disability or identity to satisfy unexamined bias.

# Leadership presence in behaviour

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Situation / intention

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## Words or behaviour to practise

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## Likely response / adjustment

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## Observer feedback / next attempt

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Leadership presence in behaviour

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Presence is relational and contextual, not a fixed charisma score.

Avoid equating accent, extroversion, appearance or cultural style with leadership quality.

Feedback should describe effect and behaviour rather than broad personal labels.

## DEBRIEF QUESTIONS

- 01** What should people be able to do because of your contribution?
- 02** Which behaviour communicates authority without closing dialogue?
- 03** What feels authentic and effective rather than imitated?
- 04** How will you know the effect you actually had?

## WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive wants to create calm in a tense review. She rehearses stating the decision needed, acknowledging uncertainty and pausing for questions instead of speaking faster and adding more slides.

## A NEXT-STEP EXPERIMENT

Ask two participants for one specific observation about clarity and room for contribution after the next meeting.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R11](#) [R12](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E26

# A quality expressed more deliberately

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This exercise develops a chosen leadership quality by translating it into behaviours across situations. It differs from strengths discovery because the quality may be aspirational. The aim is a credible practice plan, not a claim that the client possesses the quality at a particular level.

## FACILITATION SEQUENCE

- 1** Choose one quality that would improve your contribution in a current challenge.
- 2** Define it through two observable behaviours and one non-example.
- 3** Identify a role model or past episode that illustrates those behaviours.
- 4** Choose a low-risk practice situation and rehearse the response.
- 5** Collect feedback and decide what to retain, adapt or practise again.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not prescribe a personality change; focus on a chosen behaviour and its effect.

# A quality expressed more deliberately

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

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graph LR
    A[Quality to develop] --> B[Observable behaviours]
    B --> C[Non-example]
    C --> D[Model or evidence]
  
```

**Quality to develop**

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**Observable behaviours**

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**Non-example**

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**Model or evidence**

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**What I notice from the completed activity**

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**What I need to check or understand better**

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**My next step / evidence I will look for / review date**

\_\_\_\_\_

# A quality expressed more deliberately

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Quality labels need behavioural definitions to become coachable.

Aspirational language should not be mistaken for demonstrated capability.

Progress can be uneven across situations; review context as well as effort.

## DEBRIEF QUESTIONS

- 01** What would this quality look like in the next meeting?
- 02** How could it be overdone?
- 03** What small behaviour makes it credible?
- 04** Who can give useful feedback on the attempt?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader chooses curiosity and defines it as asking two genuine questions before recommending a solution. She practises in a routine review before trying it in a high-stakes discussion.

## A NEXT-STEP EXPERIMENT

Practise the behaviour in three situations and note when it helped and when a different response was needed.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R20](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E30

# Business SWOT for an executive decision

ASSESS / ACTIVATE • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This business-level SWOT supports a strategic conversation about a defined organisational objective. It is separate from the client's personal SWOT. Entries should be grounded in business evidence and tested with relevant stakeholders; the coach facilitates thinking rather than acting as an unqualified strategy or financial adviser.

## FACILITATION SEQUENCE

- 1** Define the business question, scope and time horizon.
- 2** List internal strengths and constraints using operational, customer or capability evidence.
- 3** List external opportunities and threats, marking assumptions clearly.
- 4** Create possible strategic responses by connecting internal and external factors.
- 5** Choose an information-gathering action or a bounded experiment and identify the proper decision authority.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Refer regulated financial, legal or sector-specific questions to qualified professionals.

# Business SWOT for an executive decision

ASSESS / ACTIVATE • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Strengths — internal

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## Weaknesses — internal

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## Opportunities — external

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## Threats — external

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Business SWOT for an executive decision

ASSESS / ACTIVATE • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

SWOT is an organising heuristic, not a substitute for market analysis or a business case.

Keep the owner's preferences separate from evidence about the business.

A plausible option needs feasibility and risk review before implementation.

## DEBRIEF QUESTIONS

- 01** What data supports this entry?
- 02** Which customer or stakeholder perspective is missing?
- 03** What is the most consequential uncertainty?
- 04** Who has authority to decide the next step?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A service business has strong client relationships but a capacity bottleneck. The opportunity to enter a new segment is tested through a small pilot rather than an immediate expansion commitment.

## A NEXT-STEP EXPERIMENT

Validate one high-impact assumption with an appropriate source and document how it changes the options.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R03](#) [R19](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E50

# Make your contribution visible

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Visibility is useful when the right people can understand a contribution and its relevance. This exercise distinguishes evidence-based communication from self-promotion for its own sake. It is particularly helpful for capable people whose work is hidden, while recognising that access and bias may also affect recognition.

## FACILITATION SEQUENCE

- 1** Choose a contribution that deserves to be understood and identify the people for whom it is relevant.
- 2** Clarify what each audience needs to know and what decision or relationship the communication should support.
- 3** Gather concise evidence and acknowledge the contributions of others.
- 4** Select a suitable channel and prepare a clear, proportionate message.
- 5** Agree a follow-up that invites dialogue rather than assuming that sending the message creates understanding.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

|                                      |                                           |                                           |
|--------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Client purpose</b><br><hr/> <hr/> | <b>Adaptation / access</b><br><hr/> <hr/> | <b>Evidence to revisit</b><br><hr/> <hr/> |
|--------------------------------------|-------------------------------------------|-------------------------------------------|

## BOUNDARY AND CARE

Protect client, employee and commercially sensitive information; do not invent testimonials or results.

# Make your contribution visible

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

**Support / challenge**

\_\_\_\_\_

\_\_\_\_\_

**Information / influence**

\_\_\_\_\_

\_\_\_\_\_

**ME / SHARED PURPOSE**

**Practical help**

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\_\_\_\_\_

**Reciprocity / next contact**

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\_\_\_\_\_

Use initials. Add connections and label the help, expectation or agreement.

**What I notice from the completed activity**

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\_\_\_\_\_

**What I need to check or understand better**

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**My next step / evidence I will look for / review date**

\_\_\_\_\_

# Make your contribution visible

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Visibility should serve a purpose, not become constant broadcasting.

Recognition is not wholly within the client's control.

Avoid advice that asks a person to compensate indefinitely for biased systems.

## DEBRIEF QUESTIONS

- 01** Who needs this information to make a better decision?
- 02** What evidence makes the contribution credible?
- 03** Who else should receive credit?
- 04** What barrier is structural rather than a communication issue?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A project leader prepares a one-page account of a service improvement, including customer evidence and team contributions, for a portfolio review where future resources will be discussed.

## A NEXT-STEP EXPERIMENT

Share one evidence-based contribution through an appropriate channel and ask what was understood or still unclear.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R11](#) [R12](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E51

# Find the strengths hidden in ordinary work

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

People often overlook capabilities that feel easy, familiar or unremarkable to them. This exercise looks for useful behaviours embedded in ordinary work, recurring requests for help and successful adaptation. It complements formal assessment without claiming to identify a hidden trait profile.

## FACILITATION SEQUENCE

- 1** List tasks others repeatedly ask you to help with and work you complete reliably without much fanfare.
- 2** Choose three examples and describe what you notice or do that may not be obvious to others.
- 3** Ask a trusted person for a concrete example of your useful contribution.
- 4** Form two strength hypotheses and identify where they create value and where they may not.
- 5** Choose a new application or a more deliberate explanation of the contribution.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Keep this as developmental inquiry, not an alternative to a validated strengths or ability assessment.

# Find the strengths hidden in ordinary work

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Ordinary task

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## What others ask of me

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## Behaviour they may value

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## Observer example

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## Strength hypothesis

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## New application

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Find the strengths hidden in ordinary work

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Familiarity can hide capability, but ease alone does not prove effectiveness.

Use observer examples as evidence to examine, not unquestionable truth.

A strength hypothesis remains provisional until tested across relevant situations.

## DEBRIEF QUESTIONS

- 01** What do you dismiss because it feels easy to you?
- 02** What do others find difficult that you help clarify?
- 03** Which behaviour appears in more than one example?
- 04** How could you test the hypothesis without overstating it?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An administrator repeatedly helps senior colleagues turn vague requests into clear next steps. She recognises a practical structuring capability and applies it to improving a recurring project handover.

## A NEXT-STEP EXPERIMENT

Use the proposed strength in one new task and request feedback on the value it created.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R11](#) • Conceptual support; this original activity is not independently validated.

Inventory references: N02

# E

## Confidence, beliefs and decisions

### ASSESS / ACTIVATE

Separate observations from interpretations and build proportionate experiments.

## 12

### ACTIVITIES AND PRACTICE RESOURCES

Coach guide → Participant working page → Results and debrief  
Select the tool that fits the purpose. Adapt it with the client.

A clear conclusion. A proportionate next step. Evidence worth reviewing.

# Thinking patterns: a reality check

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This original reference and worksheet helps a client notice common thinking shortcuts in ordinary work situations. The aim is greater accuracy and choice, not compulsory positive thinking. A concern may be well founded. The coach helps distinguish observation, interpretation and response without delivering clinical cognitive therapy.

## FACILITATION SEQUENCE

- 1** Choose a manageable recent situation and write what could have been observed directly.
- 2** Record the interpretation that followed and the response it encouraged.
- 3** Consult the ten-pattern reference and select a possible pattern only if the client finds it relevant.
- 4** Look for supporting evidence, contradictory evidence and a more balanced account.
- 5** Choose a practical response or a small test of the prediction.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Use only within coaching competence. Refer significant or persistent distress for appropriate professional support.

# Thinking patterns: a reality check

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

- 01 Treating a complex result as complete success or total failure.
- 02 Turning one event into a rule about every future event.
- 03 Noticing only evidence that supports the worry.
- 04 Explaining away useful evidence of progress or capability.
- 05 Assuming another person's thoughts without checking.
- 06 Treating a feared future as already decided.
- 07 Jumping to the worst consequence without examining likelihood or response.
- 08 Treating a feeling as sufficient evidence of an external fact.
- 09 Using inflexible shoulds that ignore context and competing needs.
- 10 Turning a behaviour or mistake into a judgement of the whole person.

**The prompt or pattern I choose to explore / what it means in this situation**

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**Evidence, next step and review**

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# Thinking patterns: a reality check

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A pattern label is a prompt, not a diagnosis or proof that the concern is false.

Where evidence supports a real problem, move to problem-solving, support or escalation.

Do not argue the client out of their experience.

## DEBRIEF QUESTIONS

- 01** What do you know and what are you inferring?
- 02** What other explanation is plausible?
- 03** What would you say to a colleague in the same situation?
- 04** What action fits the evidence rather than the worst prediction?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

After one unanswered email, a leader concludes that a stakeholder rejects the proposal. She recognises mind-reading as a possibility, checks the facts and sends a neutral clarification rather than withdrawing.

## A NEXT-STEP EXPERIMENT

Test one prediction through a low-risk observation or conversation and record what actually happens.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R15](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: W18, FE12

# Choose the right degree of stretch

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This continuum helps a client distinguish useful challenge from habitual under-stretch or unsustainable overload. It avoids the simplistic idea that growth always requires leaving comfort behind. Rest, competence and stability can be appropriate; the question is what the present situation requires.

## FACILITATION SEQUENCE

- 1** Choose one task or development challenge and describe its demands.
- 2** Place it on a client-defined continuum from under-stretched through manageable challenge to overloaded.
- 3** Identify the evidence: attention, preparation, performance, recovery and available support.
- 4** Adjust one variable such as task size, pace, skill support, authority or recovery time.
- 5** Choose a safe experiment and define a signal to pause or reduce demand.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not use this exercise to normalise excessive workload or override safety concerns.

# Choose the right degree of stretch

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

Choose your own anchors. A position is a reflection, not a diagnosis.

## Current position



## Preferred workable position



### What I notice from the completed activity

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### What I need to check or understand better

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### My next step / evidence I will look for / review date

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# Choose the right degree of stretch

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The continuum is subjective and task-specific, not a stress or resilience test.

Discomfort can signal learning, danger, exclusion or overload; explore before encouraging more stretch.

A decision to reduce demand can be a sound development choice.

## DEBRIEF QUESTIONS

- 01** What makes this stretch useful rather than merely uncomfortable?
- 02** What evidence suggests the load is too much or too little?
- 03** What support would change the picture?
- 04** What would a sensible next level look like?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager is asked to lead a major client presentation without preparation time. The coaching plan adds rehearsal and a co-presenter rather than interpreting anxiety as a need to “be braver”.

## A NEXT-STEP EXPERIMENT

Try the adjusted challenge once and review performance, learning and recovery afterwards.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B02, E46

# Release, resolve or retain

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Letting go is not the same as forgetting, forgiving or abandoning a legitimate concern. This exercise helps a client distinguish an issue that needs action, a commitment that needs renegotiation and an unhelpful mental burden they may choose to release. The client retains control over what release means.

## FACILITATION SEQUENCE

- 1** Name the issue, commitment or expectation you are carrying.
- 2** Describe what holding on currently protects or provides, as well as what it costs.
- 3** Sort the issue into resolve, renegotiate, retain with boundaries, or release a particular response.
- 4** Choose one practical step and identify what must not be lost or ignored.
- 5** Define a way to notice when the issue returns and respond deliberately rather than automatically.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Never require forgiveness, reconciliation or contact with someone who may cause harm.

**ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

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

Focus / question / goal: \_\_\_\_\_

| What I notice from the completed activity | What I need to check or understand better |
|-------------------------------------------|-------------------------------------------|
|                                           |                                           |
|                                           |                                           |

**My next step / evidence I will look for / review date**

# Release, resolve or retain

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Releasing rumination does not mean accepting mistreatment.

Some commitments should be renegotiated rather than silently abandoned.

A return of the thought is not failure; review the response and unresolved practical needs.

## DEBRIEF QUESTIONS

- 01 What deserves resolution rather than release?
- 02 What are you afraid would be lost by changing your response?
- 03 What can you stop carrying without denying what happened?
- 04 What support would make the next step easier?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader remains angry about a past decision. She separates the unresolved governance question, which needs a formal conversation, from repeatedly rehearsing an argument that no longer changes anything.

## A NEXT-STEP EXPERIMENT

Take one resolving or renegotiating action and practise one agreed response when the issue reappears.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R16](#) [R18](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B05, S05, E28, Q29, R08

# Put the inner critic on paper

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Externalising a self-critical voice can help a client examine its messages without treating them as facts. The client may draw a shape, write a headline or use a neutral label. This is a metaphorical coaching exercise, not an interpretation of voices, a diagnosis or a clinical intervention.

## FACILITATION SEQUENCE

- 1** Choose one self-critical statement associated with an ordinary work challenge.
- 2** Write or sketch it outside yourself, using a label that feels respectful rather than shaming.
- 3** Identify the trigger, the rule it imposes and what it may be trying to prevent.
- 4** Compare the message with evidence and write a more accurate, useful response.
- 5** Rehearse using the response while taking a small practical action.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

If the client describes experiences that are distressing or beyond ordinary self-talk, stay within competence and discuss appropriate support.

# Put the inner critic on paper

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

**Sketch an image, symbol or pattern — you decide its meaning.**

**What I notice from the completed activity**

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\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_  
\_\_\_\_\_

**My next step / evidence I will look for / review date**

\_\_\_\_\_

# Put the inner critic on paper

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The drawing is a metaphor, not a separate entity or evidence about mental health.

The aim is a fairer response, not silencing every doubt.

Retain valid information about preparation or risk while rejecting global self-judgement.

## DEBRIEF QUESTIONS

- 01 What is the message asking you to believe?
- 02 What useful concern is hidden inside the harsh wording?
- 03 What does the evidence actually support?
- 04 How can you respond firmly without attacking yourself?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

Before a board meeting, a director thinks “You will expose yourself as incompetent.” She replaces this with “I need to distinguish what I know, what I recommend and what remains uncertain,” then rehearses the opening.

## A NEXT-STEP EXPERIMENT

Use the balanced response before two relevant situations and record whether it supports more effective behaviour.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R15](#) [R16](#) • Conceptual support; this original activity is not independently validated.

Inventory references: D03, E27

# Learn from a credible role model

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This exercise uses a role model to identify learnable behaviour, not to encourage imitation of someone else's personality. The client chooses a person whose relevant actions they have observed or can verify. The output is a small behaviour to practise in the client's own context.

## FACILITATION SEQUENCE

- 1** Choose a capability you want to develop and a person who demonstrates it credibly.
- 2** Describe what the person actually does, separating observation from reputation.
- 3** Identify the principles and preparation that may support the behaviour; mark assumptions.
- 4** Adapt one behaviour to your role, style and constraints.
- 5** Rehearse and test the adaptation, then seek specific feedback.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Avoid stereotypes about what a leader should look or sound like.

# Learn from a credible role model

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Situation / intention

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## Words or behaviour to practise

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## Likely response / adjustment

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## Observer feedback / next attempt

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Learn from a credible role model

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A role model is a source of ideas, not an authority on every issue.

Success may depend on context and privilege as well as behaviour.

Choose a small, observable practice rather than a vague ambition to “be like” someone.

## DEBRIEF QUESTIONS

- 01** What have you actually observed rather than assumed?
- 02** What can be learned without copying the whole person?
- 03** What would not fit your context?
- 04** How will you test whether the adaptation helps?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager admires a colleague’s calm challenge. She identifies the behaviour as asking for the decision criterion before debating the answer, and practises that question in a routine meeting.

## A NEXT-STEP EXPERIMENT

Try the adapted behaviour twice and ask an observer whether it improved the conversation.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R20](#) • Conceptual support; this original activity is not independently validated.

Inventory references: D06, IG04

# Four views of a decision

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This four-quadrant inquiry examines the consequences of acting and not acting. It uses the general logic of Cartesian-style questions to broaden a decision conversation. It does not calculate the right answer; its value is in exposing assumptions, omissions and asymmetrical attention to risk.

## FACILITATION SEQUENCE

- 1** Write a specific decision with two clearly defined alternatives: act or do not act for now.
- 2** Explore what may happen if you act and what may not happen if you act.
- 3** Explore what may happen if you do not act and what may not happen if you do not act.
- 4** Mark each entry as evidence, plausible expectation or uncertain assumption.
- 5** Identify the most important uncertainty and a reversible next step or decision criterion.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not use the framework as a substitute for legal, medical or financial advice.

# Four views of a decision

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

**If I act: what may happen**

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**If I act: what may not happen**

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**If I do not act: what may happen**

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**If I do not act: what may not happen**

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**What I notice from the completed activity**

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**What I need to check or understand better**

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**My next step / evidence I will look for / review date**

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# Four views of a decision

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The quadrants are a thinking aid, not a risk model or probability calculation.

Avoid double-counting the same consequence under different wording.

For high-stakes decisions, combine this with appropriate factual and professional analysis.

## DEBRIEF QUESTIONS

- 01** Which quadrant did you find hardest to complete?
- 02** What cost of inaction had you overlooked?
- 03** Where are you treating a possibility as certainty?
- 04** What information could materially change the decision?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader considering a role move notices that staying also carries a cost: limited development opportunity. She gathers information about both the new role and possible redesign of the current one.

## A NEXT-STEP EXPERIMENT

Obtain one piece of decision-relevant information and revisit the four quadrants before committing.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R19](#) [R21](#) • Conceptual support; this original activity is not independently validated.

Inventory references: M04

# Reframe a limitation without denying it

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

A behaviour described as a weakness may have a useful function in some situations and a cost in others. This exercise replaces global labels with a contextual account. It is not an instruction to call every problem a strength or avoid a genuine development need.

## FACILITATION SEQUENCE

- 1** Write the label you use for the limitation and describe a concrete example.
- 2** Identify the behaviour underneath the label and the need it may serve.
- 3** Find a situation where a related behaviour is useful, without denying current costs.
- 4** Define when to use, reduce or complement the behaviour.
- 5** Choose a practical adjustment and a way to review its effect.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Keep accountability visible; reframing must not excuse harm to others.

# Reframe a limitation without denying it

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Situation / observable evidence

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## Interpretation / assumption

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## Alternative view / uncertainty

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## Chosen response / test

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Reframe a limitation without denying it

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A reframe is useful only if it improves accuracy and action.

Do not relabel harmful conduct as a strength.

A behaviour can be understandable and still require change.

## DEBRIEF QUESTIONS

- 01** What does the label hide about the actual behaviour?
- 02** When might a related response be useful?
- 03** What still needs to change?
- 04** What complementary behaviour would help?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director calls herself “too cautious”. She recognises useful risk awareness but also delayed decisions. She sets a proportionate evidence threshold and a decision date rather than trying to become generally less careful.

## A NEXT-STEP EXPERIMENT

Use the new boundary in one decision and review both decision quality and avoidable delay.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R15](#) [R16](#) • Conceptual support; this original activity is not independently validated.

Inventory references: M05, IG10

# Borrow a mentor's perspective

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This perspective exercise asks what a trusted mentor might help the client notice. It can use a real person, an admired practitioner or a clearly imagined composite. It is a way to generate ideas from the client's own understanding, not a claim to know what another person would actually advise.

## FACILITATION SEQUENCE

- 1** Define the question or decision in one sentence.
- 2** Choose one or two mentor perspectives relevant to the issue and explain why they are useful.
- 3** Imagine the questions each mentor might ask, rather than inventing authoritative answers.
- 4** Write the advice you would offer a colleague facing the same situation.
- 5** Compare the perspectives with facts and choose a practical next step.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Never attribute invented quotations to a real mentor or imply contact that did not occur.

# Borrow a mentor's perspective

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Question

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## Mentor perspective one

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## Mentor perspective two

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## Advice I would give a colleague

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Borrow a mentor's perspective

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Imagined advice is a hypothesis, not actual expert guidance.

Use several perspectives when one admired person's view dominates.

The client remains responsible for the decision and for obtaining appropriate advice.

## DEBRIEF QUESTIONS

- 01 What does this perspective help you notice?
- 02 What might the imagined mentor not understand about your context?
- 03 What is your own judgement after considering the ideas?
- 04 What should be checked with a real person?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A founder imagines how an experienced operator and a trusted customer might view a service expansion. The contrast reveals a capacity question that needs real data before deciding.

## A NEXT-STEP EXPERIMENT

Check the most important assumption with an informed person or reliable source.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R08](#) [R19](#) • Conceptual support; this original activity is not independently validated.

Inventory references: M06, E21, Q19

# Control, influence and concern

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This three-ring map helps a client allocate effort across direct control, influence and matters they cannot currently change. It is a practical heuristic. The purpose is not to dismiss legitimate concerns but to distinguish personal action from requests, collective action and appropriate support.

## FACILITATION SEQUENCE

- 1** List the factors in one current challenge.
- 2** Place each factor in direct control, possible influence or current concern, explaining the reasoning.
- 3** Look for factors that may move rings through information, relationships, authority or collective action.
- 4** Choose one direct action and one influence attempt, with a realistic expectation of response.
- 5** Decide how to manage attention to the remaining concern without denying it.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

|                                      |                                           |                                           |
|--------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Client purpose</b><br><hr/> <hr/> | <b>Adaptation / access</b><br><hr/> <hr/> | <b>Evidence to revisit</b><br><hr/> <hr/> |
|--------------------------------------|-------------------------------------------|-------------------------------------------|

## BOUNDARY AND CARE

Do not use acceptance language to normalise unsafe, discriminatory or abusive conditions.

# Control, influence and concern

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

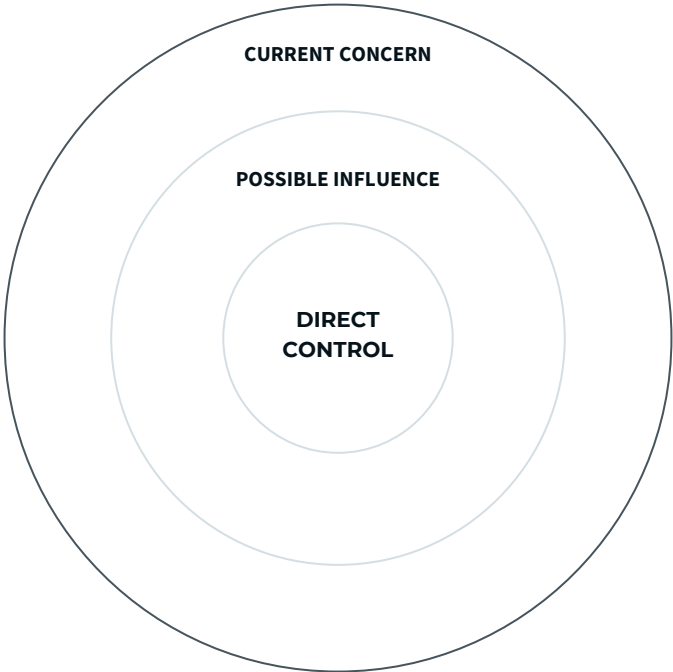
Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

Place factors in the rings.  
Explain why each belongs there.  
Consider what could move it.



**What I notice from the completed activity**

**What I need to check or understand better**

**My next step / evidence I will look for / review date**

# Control, influence and concern

ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The rings are contextual, not permanent facts.

Influence is an attempt, not control over another person.

A concern can remain important even when immediate action is limited.

## DEBRIEF QUESTIONS

- 01** What is genuinely within your authority?
- 02** Whose cooperation would change the situation?
- 03** What concern needs collective rather than individual action?
- 04** What would a proportionate use of attention look like?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader cannot determine a group restructuring decision but can clarify her team's information needs, prepare options and request a communication timetable.

## A NEXT-STEP EXPERIMENT

Take one direct action and one influence step; review what changed in the map.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R05](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: M09, E49

# Test a limiting rule

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This exercise examines a self-imposed rule that may constrain a client's options, such as "I must know every answer before I speak." It distinguishes protective assumptions from verified requirements. The goal is a small, safe test rather than a dramatic declaration that the belief has disappeared.

## FACILITATION SEQUENCE

- 1** Identify a situation where you repeatedly avoid an action you value.
- 2** Write the rule or prediction that appears to guide the avoidance.
- 3** Ask what the rule protects and what evidence supports or challenges it.
- 4** Create a more flexible rule that preserves legitimate caution.
- 5** Design a low-risk experiment with a clear prediction and observation plan.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Choose a setting with manageable interpersonal risk and appropriate support.

# Test a limiting rule

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Question or hypothesis

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## Action to test

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## Evidence to observe

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## Review / adapt / stop

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Test a limiting rule

ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A rule can be partly true and still too rigid.

Changing wording is not the same as changing behaviour; test the revised rule.

Do not assume every barrier is internal when authority, access or bias may be involved.

## DEBRIEF QUESTIONS

- 01** Where did this rule help you in the past?
- 02** Is it required in every current situation?
- 03** What exception already exists?
- 04** What small test would be informative without being reckless?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A specialist believes she must have a complete solution before raising a concern. She tests saying, “I see a risk and have two possible directions, but need input,” in a supportive project meeting.

## A NEXT-STEP EXPERIMENT

Record the predicted response, the actual response and what the comparison suggests.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R15](#) [R08](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E22, IG10

# Clear the mental workbench

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This exercise externalises unfinished thoughts, tasks and worries so that the client can distinguish what needs action from what merely needs a place to be held. It is a practical attention-management activity, not a treatment for rumination or a promise to empty the mind.

## FACILITATION SEQUENCE

- 1** Spend five minutes writing short labels for everything occupying attention, without sorting as you go.
- 2** Group the entries into actions, decisions, conversations, waiting items and concerns.
- 3** Identify the next physical action for items that can move forward.
- 4** Place waiting items and concerns in a review system rather than repeatedly rehearsing them.
- 5** Choose one priority and a stopping point for the current work period.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

If intrusive thoughts or distress are persistent, use appropriate professional support rather than relying on a productivity exercise.

# Clear the mental workbench

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Keep / continue

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## Stop / resolve

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Clear the mental workbench

ASSESS / ACTIVATE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A long list may reveal workload beyond capacity, not poor personal organisation.

Some concerns need support or a formal decision rather than another task entry.

The aim is a trusted external record, not a permanently empty mind.

## DEBRIEF QUESTIONS

- 01** Which item is repeatedly returning because it lacks a next step?
- 02** What is not yours to solve alone?
- 03** What can be parked with a review date?
- 04** What would make stopping work easier today?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader's list reveals three decisions awaiting sponsor input. She sends one clear request and sets a follow-up date, rather than carrying the decisions as personal unfinished work.

## A NEXT-STEP EXPERIMENT

Use the capture-and-sort routine at the end of three workdays and review whether it clarifies the next day's priorities.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

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**Research basis:** [R04](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E39

# Thirty-seven questions for a fresh view

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This original question bank supports clients who feel stuck in a narrow account of a problem. The questions explore facts, exceptions, options, relationships, agency and action. They are not a script to “break through resistance”; the coach selects questions with the client and follows the response.

## FACILITATION SEQUENCE

- 1** Agree the issue and ask permission to try a different angle.
- 2** Choose a small number of questions from the dedicated thirty-seven-question bank.
- 3** After each response, reflect what you heard and allow silence before asking another question.
- 4** Record any new distinction between fact, assumption, option and next step.
- 5** Let the client choose whether to act, gather information or continue reflection.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Use the linked expanded question bank; do not ask every question mechanically.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Do not use questions to imply a diagnosis, force disclosure or lead the client to a predetermined answer.

# Thirty-seven questions for a fresh view

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

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

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: \_\_\_\_\_

## Question selected

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## What I notice

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## Fact or assumption

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## New option

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## Information needed

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## Chosen next step

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## What I notice from the completed activity

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## What I need to check or understand better

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## My next step / evidence I will look for / review date

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# Thirty-seven questions for a fresh view

ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A powerful question is useful because of its fit, not because it sounds dramatic.

Repeated questioning can become pressure; slow down when the client needs space.

An unresolved systemic issue may require diagnosis or action beyond coaching.

## DEBRIEF QUESTIONS

- 01** What part of the situation have you not yet described?
- 02** When is the problem less present?
- 03** What would someone with a different stake notice?
- 04** What is the smallest useful move available now?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director says a team is resistant. A question about exceptions reveals that the team adopts changes when decision rights are clear. The next action is to clarify authority rather than intensify persuasion.

## A NEXT-STEP EXPERIMENT

Choose one observation or conversation that tests the new perspective and review what it reveals.

**My conclusion from this activity**

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**What I will do / what I will observe / when I will review**

---

**Research basis:** [R19](#) [R18](#) • Conceptual support; this original activity is not independently validated.

Inventory references: FQ03