HR DELIVERY

Making Sure HR Delivers

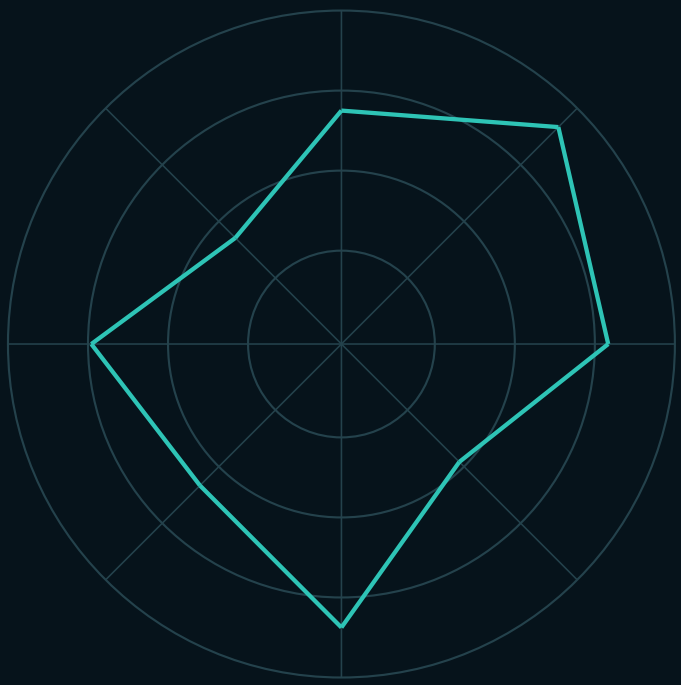
Additional Coaching exercises

An original executive-coaching toolkit
From purposeful reflection to practical change.

152

activities and practice resources

13 sections • 22 workshop activities
Original scripts, visual worksheets,
question banks and debriefs



PRACTITIONER EDITION / OCTOBER 2026

What this toolkit contains

A working resource, not a catalogue

This is an independently written HR Delivery toolkit for executive coaches and organisational practitioners. It contains 152 numbered activities and practice resources, each with a coach guide, a participant recording page, interpretation guidance, four debrief questions, an explicitly fictional example and a next-step experiment. Additional scripts, question banks, programme plans and forms are included where the activity requires them.

Coverage of the earlier inventory

The directory reconciles 421 source and component references, including duplicates, parent bundles, named infographic topics and language or format variants. Every named coaching-activity purpose in the inventory has a corresponding original resource or explicitly identified alternative. The count is a coverage register, not 421 unique exercises.

What “corresponding” means

The public titles and descriptions informed the purpose inventory. The commercial paid worksheets and unpublished scripts were not obtained, so this book does not claim to reproduce their exact mechanics, wording, layouts or proprietary content. Research was reviewed for the underlying methods and limitations; it does not establish the effectiveness of each newly written activity.

Non-activity products are distinguished

The publication includes original educational content and communication templates for the marketing themes. It does not contain the supplier’s Canva projects, hundreds of JPG format variants, MP3 recordings, a separate Spanish translation set or an archive of blog articles. Those entries remain visible in the crosswalk rather than being silently counted as coaching exercises.

Select by need, not by volume.

Use the activity directory for a coaching purpose and the crosswalk for an original catalogue title.

A note to the practitioner

Start with the person, not the worksheet

An executive does not need to complete a library of exercises to benefit from coaching. A well-chosen question, an accurate account of a situation and a realistic experiment may be enough. Use the directory to find a suitable activity, explain its purpose and invite the client to adapt or decline it.

Keep the work grounded

The toolkit deliberately returns to evidence: what happened, what the client inferred, what they did and what changed. Metaphors, future scenes and wheels can be useful ways to think, but they are not diagnoses. A vivid vision is not a forecast and a high confidence rating is not proof of competence.

Make organisational conditions visible

Executive difficulties often involve role clarity, decision rights, workload, relationships and systems. Do not make the client responsible for solving every structural problem through better habits or a more positive attitude. Identify where a request, a management decision or specialist support is needed.

Use the pages as working space

The writing areas, plotters and charts are intentionally blank for the client's own evidence. The fictional examples demonstrate the standard of specificity, not a right answer. A useful page ends in one clear conclusion, one proportionate next step and a sensible review of what happens.
HR Delivery | Practitioner edition | October 2026

One conclusion. One proportionate next step.

The client's own evidence and choices matter more than completing the page.

Contents

Click an entry in the master PDF to open the section or resource.

How to use this toolkit 006

Purpose, facilitation, safeguards and rating rules.

Activity directory 011

All 152 original resources with page references.

A / Starting the coaching work 019

Align / Agree

B / Values, identity and meaning 041

Assess

C / Vision, goals and direction 065

Align / Activate

D / Career, strengths and leadership 108

Assess / Activate

E / Confidence, beliefs and decisions 169

Assess / Activate

F / Action, habits and momentum 206

Activate / Apply

Resources and reference

Click an entry in the master PDF to open the section or resource.

G / Time, priorities and delegation 240
Apply

H / Energy, balance and relationships 271
Assess / Apply

I / Review, renewal and closure 329
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J / Workshop activities 348
Across the 6A journey

M / Grounding and guided imagery 415
Assess / Activate

N / Practice forms and communication 436
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O / Business-owner coaching 477
Align / Assess / Apply

Programme, cards and question banks 503
Routes, ninety-day plan, forms and reusable materials.

Coverage and evidence 619
Inventory crosswalk, research and implementation notes.

How to use an activity

1. Contract for the purpose

Ask what the client wants the conversation to enable. Check whether coaching is the appropriate service and whether this exercise fits the agreed scope. Invite a less personal or less visual alternative when needed.

2. Prepare the materials

Read the coach page, select the participant page and any linked script or item sheet, and provide a pen or suitable PDF annotation tool. The estimated duration covers a typical use including discussion; extend or shorten it with the client. Charts are static, not auto-calculating.

3. Facilitate the five steps

Use the instructions as a structure, not a speech to deliver at the client. Ask permission before moving into sensitive territory. Give thinking time, check meaning and distinguish the client's words from your interpretation.

4. Interpret, debrief and test

Use the results page to avoid unsupported conclusions. Choose from the four debrief questions rather than interrogating the client with all of them. Record a conclusion, a feasible experiment, evidence and a review date. Revisit or stop the activity if it is not useful.

5. Keep records proportionately

Use initials or a client code on worksheets. Store only what is needed in an approved system, with agreed access and retention arrangements. The separate Participant Workbook contains the working pages without the coach commentary; the complete guide remains in this master.

Read the guide. Use the working page. Debrief the result.

The separate workbook is a convenience; it does not replace the facilitation and interpretation guidance.

Use the six stages as a flexible route

Align

Connect the work with the client's purpose, role and organisational context. Useful starting points: ACE-A03, C03, D11 and O07. Alignment is a discussion, not permission for a sponsor to determine all personal goals.

Agree

Establish scope, roles, confidentiality, practical terms and evidence of usefulness. Use ACE-A02, A06 and the working-agreement drafting template. Revisit agreement when goals, stakeholders or technology change.

Assess

Explore the situation through examples, reflection, appropriate feedback and context. Use the values, career, confidence and balance sections selectively. The original reflective questionnaires are not validated psychometric tests.

Activate

Choose a meaningful direction and design a responsible experiment. Use ACE-C05, C12, E10 and F04. Consider barriers, competing responsibilities and support before making a commitment.

Apply

Practise in real work and observe the effects. Use the action, time, delegation and relationship tools. A rehearsal should lead to a suitable real-world attempt, not remain a satisfying conversation.

Assure

Review evidence, unintended effects, learning and continuing need. Use ACE-I01, I04 and I05. The stages can repeat; they are not a compulsory sequence of six sessions.

A flexible route, not a compulsory sequence.

Return to agreement whenever the purpose, stakeholders, conditions or professional boundaries change.

Facilitation, ethics and safeguards

Agency and confidentiality

Participation, personal disclosure and imagery are optional. Explain confidentiality and its limits before sensitive work. In sponsor-funded coaching, agree exactly what may be shared and obtain the required client approval. Do not promise anonymity in small feedback groups. Research basis: R01.

Coaching is not clinical care

Do not diagnose, treat symptoms, process trauma or interpret dreams as psychological evidence. If serious distress, health concerns or risk emerges, pause and use appropriate professional, safeguarding or emergency support. Attention practices can be unhelpful for some people; offer an external-focus or no-exercise alternative. Research basis: R13, R01.

Groups, access and power

Offer seated, written and remote alternatives. Use plain language, allow preparation time and never reward intimate disclosure. In mixed-seniority groups, private or anonymous response methods may be safer than public positioning. A workshop cannot itself guarantee psychological safety. Research basis: R12.

Gulf and international practice

Ask rather than assume how language, hierarchy, family commitments, religion, sponsorship, mobility or organisational ownership affect the client's choices. Avoid treating GCC countries or national and expatriate workforces as homogeneous. Obtain local advice on legal, privacy, employment or financial questions rather than using a generic coaching template as compliance guidance.

Technology and AI

Do not place identifiable client material in an unapproved system. Explain and agree any recording, transcription or AI assistance, including purpose, access and relevant risks. This book alone is not a safety-tested specification for an autonomous coach; automated delivery requires separate governance, referral and human-support arrangements. Research basis: R01.

The client may decline, pause or choose another approach.

When the need exceeds coaching, use the appropriate support rather than intensifying an exercise.

How to handle ratings and questionnaire results

Reflective, not psychometric

The newly written scales, wheels and item sets are conversation aids. They have not been validated, normed or tested for reliability, measurement invariance or predictive use. Do not use them for recruitment, promotion, clinical screening or a ranking of employees.

Follow the stated rules

Each questionnaire states its response anchors, missing-data treatment and permitted summary. Do not invent a total score or red/amber/green threshold. For wheels, define each spoke and interpret it separately. For plots, explain what the axes mean; a precise-looking point may still be a subjective estimate.

Structured and randomised versions

The main activity worksheet gives the structured version where appropriate. A separate fixed randomised participant version and a position-to-item key are supplied for ACE-A04, A07, D07, H06 and N09. Randomisation changes order, not content or scoring. It does not remove response bias or establish validity.

Use evidence and context

Ask for examples behind a rating and consider whether the client had an opportunity to demonstrate the behaviour. Keep self-view separate from other people's observations. Report the number of valid responses where an aggregate is permitted and do not infer anonymity from a minimum response count.

Track change cautiously

Use the same definitions and reference period at review. Describe a score change as a change in reported experience, not proof that coaching caused it. Look for behavioural examples, effects on others and competing explanations. Research basis: R02, R11, R22.

A profile is an invitation to inquire, not a verdict.

Use the stated item rules and missing-data treatment. Do not create a total score or diagnostic label.

Evidence: what is supported and what is new

The research layer

Twenty-two primary research or professional sources inform the concepts and safeguards. Examples include goal setting, implementation intentions, self-efficacy, values, feedback, recovery, gratitude, listening and optional attention practices. Each activity points to relevant references and the bibliography explains their scope.

The design layer

All activity instructions, worksheets, examples, question banks, scripts and interpretation rules in this edition are original designs. A research-informed concept does not make the specific page an evidence-validated intervention. Some tools, such as SWOT, wheels and prioritisation matrices, are practical structuring devices rather than diagnostic measures.

The scope layer

The earlier public catalogue inventory supplies the coverage requirements. Exact-title mapping is retained for traceability, not as an endorsement, licence or claim of identical content. Where only an activity title or a broad purpose was public, the resource is explicitly a function-based original alternative.

The implementation layer

Before wider deployment, pilot selected activities with appropriate participants, review clarity and acceptability, check cultural and language fit, and collect evidence of useful application and unintended effects. Review the tools with a qualified practitioner and revise them based on observed use. Do not equate a large page count with professional validation.

Research-informed does not mean independently validated.

Use the sources to understand concepts and limitations; use piloting and professional review to improve the new designs.

Find the activity you need

ACE IDs identify the original HR Delivery resources. The page shown opens the coach guide; the working page and debrief follow.

ACTIVITY		MIN	PAGE
A / Starting the coaching work			
ACE-A01	Arrive with a useful agenda	10	020
ACE-A02	The coaching working agreement	45	023
ACE-A03	Coaching outcomes and evidence map	35	026
ACE-A04	Motivation and readiness profile	25	029
ACE-A05	Questions worth sitting with	30	032
ACE-A06	The first-session discovery conversation	60	035
ACE-A07	Life satisfaction conversation profile	25	038
B / Values, identity and meaning			
ACE-B01	The life chapter map	40	042
ACE-B02	A working vocabulary of values	30	045
ACE-B03	Values into everyday choices	45	048
ACE-B04	Meaning through an image or symbol	30	051
ACE-B05	A moment of effective leadership	35	055
ACE-B06	The qualities you choose to carry	35	059
ACE-B07	A leadership purpose statement	45	062
C / Vision, goals and direction			
ACE-C01	The annual direction planner	50	066
ACE-C02	The next 90 days	40	069
ACE-C03	The long view and the next step	40	072
ACE-C04	The goal beneath the goal	30	075
ACE-C05	A clear and workable goal	30	078

Find original catalogue titles in the source crosswalk. Durations are estimates, not fixed delivery requirements.

Find the activity you need

ACE IDs identify the original HR Delivery resources. The page shown opens the coach guide; the working page and debrief follow.

ACTIVITY		MIN	PAGE
C / Vision, goals and direction			
ACE-C06	The later-life perspective	35	081
ACE-C07	The contribution people remember	35	085
ACE-C08	A future headline with evidence	40	089
ACE-C09	Ambition without premature censorship	30	093
ACE-C10	Twenty-one goal-quality questions	35	096
ACE-C11	Reasons, beneficiaries and costs	30	099
ACE-C12	From intention to a tested commitment	35	102
ACE-C13	Turn a career vision into a development route	45	105
D / Career, strengths and leadership			
ACE-D01	Career values and role fit	45	109
ACE-D02	The career development wheel	40	112
ACE-D03	Strengths with evidence and range	40	115
ACE-D04	Career possibilities inquiry	45	118
ACE-D05	Personal SWOT with evidence	40	121
ACE-D06	Agency at work	35	124
ACE-D07	Developmental feedback from several perspectives	60	127
ACE-D08	Manage a development gap intelligently	40	130
ACE-D09	Twenty-five strengths inquiry questions	35	133
ACE-D10	The career history map	45	136
ACE-D11	Map a future career landscape	40	139
ACE-D12	An annual career development plan	45	142

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Find the activity you need

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ACTIVITY		MIN	PAGE
D / Career, strengths and leadership			
ACE-D13	Career year at a glance	25	145
ACE-D14	Quarterly career progress board	25	148
ACE-D15	The leadership practice wheel	40	151
ACE-D16	Leadership presence in behaviour	40	154
ACE-D17	A quality expressed more deliberately	30	157
ACE-D18	Business SWOT for an executive decision	50	160
ACE-D19	Make your contribution visible	35	163
ACE-D20	Find the strengths hidden in ordinary work	35	166
E / Confidence, beliefs and decisions			
ACE-E01	Thinking patterns: a reality check	35	170
ACE-E02	Choose the right degree of stretch	30	173
ACE-E03	Release, resolve or retain	40	176
ACE-E04	Put the inner critic on paper	35	179
ACE-E05	Learn from a credible role model	30	182
ACE-E06	Four views of a decision	35	185
ACE-E07	Reframe a limitation without denying it	35	188
ACE-E08	Borrow a mentor’s perspective	30	191
ACE-E09	Control, influence and concern	30	194
ACE-E10	Test a limiting rule	40	197
ACE-E11	Clear the mental workbench	25	200
ACE-E12	Thirty-seven questions for a fresh view	35	203

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Find the activity you need

ACE IDs identify the original HR Delivery resources. The page shown opens the coach guide; the working page and debrief follow.

ACTIVITY		MIN	PAGE
F / Action, habits and momentum			
ACE-F01	Generate actions before choosing	30	207
ACE-F02	The action and learning record	20	210
ACE-F03	Design a small daily habit	30	213
ACE-F04	Break the large task into workable pieces	35	216
ACE-F05	Understand and interrupt procrastination	35	219
ACE-F06	Take stock and choose a response	25	222
ACE-F07	A small move out of stuckness	30	225
ACE-F08	Language that supports chosen action	25	228
ACE-F09	Build the next part of the bridge	35	231
ACE-F10	Resolve the tolerations that consume attention	30	234
ACE-F11	From excuse language to a barrier plan	35	237
G / Time, priorities and delegation			
ACE-G01	Find the priority that deserves today	10	241
ACE-G02	Design a week that can actually work	30	244
ACE-G03	Choose actions by impact and effort	35	247
ACE-G04	Put the important work into the calendar	35	250
ACE-G05	See where attention really goes	30	253
ACE-G06	Reduce interruptions without becoming unavailable	35	256
ACE-G07	One weekly plan, one daily next step	25	259
ACE-G08	Choose what to stop, reduce or refuse	30	262
ACE-G09	Distinguish urgency from importance	30	265

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Find the activity you need

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ACTIVITY		MIN	PAGE
G / Time, priorities and delegation			
ACE-G10	Delegate a result, not a vague task	40	268
H / Energy, balance and relationships			
ACE-H01	The whole-life balance wheel	35	272
ACE-H02	Say no while protecting the relationship	40	275
ACE-H03	Review relationship patterns without labelling people	40	278
ACE-H04	Identify what drains and restores energy	35	281
ACE-H05	Turn unmet needs into practical requests	35	284
ACE-H06	A sustainable self-care practices review	30	287
ACE-H07	Map the people who help you move forward	30	290
ACE-H08	Redesign the work you enjoy and endure	35	293
ACE-H09	Build a wheel for the question you actually have	30	296
ACE-H10	A diary of what was worth noticing	15	299
ACE-H11	Make room for what brings you alive	30	302
ACE-H12	Create opportunities for genuine friendship	30	305
ACE-H13	Strengthen a working relationship deliberately	40	308
ACE-H14	Restore useful energy at work	35	311
ACE-H15	Add one source of brightness to an ordinary week	25	314
ACE-H16	Kindness as a series of chosen actions	25	317
ACE-H17	Plan a season you will be glad to have lived	30	320
ACE-H18	Notice strain and choose the right response	30	323
ACE-H19	Five specific things to appreciate	15	326

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Find the activity you need

ACE IDs identify the original HR Delivery resources. The page shown opens the coach guide; the working page and debrief follow.

ACTIVITY		MIN	PAGE
I / Review, renewal and closure			
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ACE-I02	**Close one year and choose the next**	50	**333**
ACE-I03	**A fresh-start review of commitments and conditions**	40	**336**
ACE-I04	**Make the learning visible at the end of a programme**	40	**339**
ACE-I05	**Close the engagement and transfer ownership**	45	**342**
ACE-I06	**Recognise your contribution with evidence**	25	**345**
J / Workshop activities			
ACE-J01	**A future worth introducing**	15	**349**
ACE-J02	**An animal metaphor, chosen rather than assigned**	15	**352**
ACE-J03	**An unexpected professional detail**	15	**355**
ACE-J04	**The contribution others can actually see**	25	**358**
ACE-J05	**Coordinate without the usual channel**	15	**361**
ACE-J06	**A nine-square connection search**	20	**364**
ACE-J07	**The experience behind an unusual fact**	20	**367**
ACE-J08	**A message from your considered judgement**	20	**370**
ACE-J09	**Facts, guesses and the confidence of our assumptions**	20	**373**
ACE-J10	**Test the statement before taking a position**	25	**376**
ACE-J11	**Seven words, then the meaning behind them**	15	**379**
ACE-J12	**Turn familiar phrases into clear meaning**	25	**382**
ACE-J13	**Keep the commitments moving**	30	**385**
ACE-J14	**Replace a label with observable evidence**	30	**388**

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Find the activity you need

ACE IDs identify the original HR Delivery resources. The page shown opens the coach guide; the working page and debrief follow.

ACTIVITY		MIN	PAGE
J / Workshop activities			
ACE-J15	See the decision from another role	35	391
ACE-J16	Take a position, then examine the conditions	25	394
ACE-J17	Write the future story with evidence	40	397
ACE-J18	Listen, reflect and check	25	400
ACE-J19	Generate options before the group commits	35	403
ACE-J20	Look back at the process as well as the result	20	406
ACE-J21	Name the learning and its first use	15	409
ACE-J22	A note to your future working self	20	412
M / Grounding and guided imagery			
ACE-M01	Choose an attention practice safely	10	416
ACE-M02	A brief pause beside falling water	10	420
ACE-M03	Pause at the shoreline	10	424
ACE-M04	Observe the current without entering it	15	428
ACE-M05	A restorative pause and a realistic next step	20	432
N / Practice forms and communication			
ACE-N01	A clear invitation to an introductory coaching conversation	20	437
ACE-N02	Build a referral network through genuine usefulness	40	441
ACE-N03	A transparent coaching invoice	25	444
ACE-N04	A receipt that confirms what was received	20	447
ACE-N05	A welcome letter that prepares the client	25	450
ACE-N06	A proportionate client information record	25	454

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Find the activity you need

ACE IDs identify the original HR Delivery resources. The page shown opens the coach guide; the working page and debrief follow.

ACTIVITY		MIN	PAGE
N / Practice forms and communication			
ACE-N07	An explicit newsletter choice	25	457
ACE-N08	A workshop readiness and delivery checklist	40	461
ACE-N09	Workshop feedback that leads to improvement	25	464
ACE-N10	A year of useful coaching conversations	45	467
ACE-N11	Explain the value and limits of coaching	35	470
ACE-N12	A transparent coaching partnership charter	30	474
O / Business-owner coaching			
ACE-O01	The owner’s annual business direction plan	60	478
ACE-O02	The business history and turning-point map	50	481
ACE-O03	Business SWOT with a decision attached	50	484
ACE-O04	Turn a business strength into a repeatable capability	45	487
ACE-O05	Manage a business weakness proportionately	45	490
ACE-O06	Turn a business vision into a tested route	50	493
ACE-O07	A business-owner discovery conversation	60	496
ACE-O08	Three perspectives on the business you want to build	60	499

Find original catalogue titles in the source crosswalk. Durations are estimates, not fixed delivery requirements.

A

Starting the coaching work

ALIGN / AGREE

Agree the purpose, boundaries and evidence before selecting an exercise.

07 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.

Arrive with a useful agenda

ALIGN / AGREE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

An executive can arrive with a long account of events but no clear request of the conversation. This preparation exercise turns recent experience into a deliberately chosen coaching agenda. It separates an incident, its significance and the decision or learning the client wants. It can be completed privately before a session; the client decides which material to share.

FACILITATION SEQUENCE

1. Recall one recent moment that still occupies your attention; describe what happened without interpreting other people's motives.
2. Identify what makes that moment relevant to your leadership, relationships or agreed coaching goals.
3. List up to three possible topics and name the useful outcome of discussing each one.
4. Choose one topic for today; specify what you want from the coach: listening, challenge, rehearsal, perspective or planning.
5. Begin the session by agreeing the focus and a sign that the conversation has been worthwhile.

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 require disclosure of private events or use the preparation sheet as a performance-monitoring form.

Arrive with a useful agenda

ALIGN / AGREE • ABOUT 10 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: _____

Recent event

What matters about it

Topics I could bring

The topic I choose

Support I request

Useful session outcome

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

Arrive with a useful agenda

ALIGN / AGREE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A long list is an agenda-selection issue, not a reason to rush through several exercises.

When the chosen topic conflicts with the contracted purpose, renegotiate before continuing.

A client may choose reflection without an immediate action; agree what useful reflection would produce.

DEBRIEF QUESTIONS

01 What is the real question beneath the update?

02 What would you prefer not to avoid today?

03 What needs a different kind of support?

04 How will we recognise a useful ending?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A regional operations director brings six project updates. She selects the moment when she reversed a team decision without consultation. Her agenda changes from “review my week” to “understand why I intervened and rehearse a different response”.

A NEXT-STEP EXPERIMENT

Before the next two sessions, complete the card in five minutes. Review whether agenda clarity improves the usefulness of the conversation.

My conclusion from this activity

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

Research basis: R01 R19 • Conceptual support; this original activity is not independently validated.

Inventory references: W01, SP08

The coaching working agreement

ALIGN / AGREE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This contracting activity creates a shared record of what coaching is for, who is involved and what information may be shared. It is especially important in sponsored executive coaching, where the person paying is not necessarily the person being coached. The output is a working agreement to be integrated with locally reviewed service terms, not a jurisdiction-ready legal contract.

FACILITATION SEQUENCE

1. Identify the client, coach, sponsor and any other party; distinguish who owns which decision.
2. Agree scope, goals, session arrangements, fees where relevant, cancellation arrangements and how either party can end the work.
3. Set the confidentiality boundary: what remains private, what may be reported, to whom and with whose agreement.
4. Discuss records, retention, access, recording, transcription and AI; default to no recording or AI upload without informed agreement.
5. Read the agreement back, resolve ambiguities and record acceptance; revisit after any material change.

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

Have commercial terms and local disclosure duties reviewed by an appropriately qualified professional. Never promise absolute secrecy.

The coaching working agreement

ALIGN / AGREE • 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: _____

Purpose and scope

Roles and responsibilities

Session and commercial arrangements

Confidentiality and exceptions

Data, records and technology

Review, change and closure

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

The coaching working agreement

ALIGN / AGREE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Unresolved confidentiality or coercion means pause contracting rather than begin sensitive exercises.

The sponsor's development interests do not create automatic access to coaching notes.

A signed form does not replace ongoing consent or compliance with applicable law.

DEBRIEF QUESTIONS

01 What might the sponsor expect that the client has not agreed?

02 Where could a dual role create a conflict?

03 What should happen if coaching is not helping?

04 What technology use needs separate agreement?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An employer funds eight sessions. The agreed sponsor report contains attendance, client-approved development goals and an agreed progress summary. It excludes personal history, verbatim comments and private worksheet ratings.

A NEXT-STEP EXPERIMENT

At session two, ask the client to explain the information-sharing agreement in their own words. Correct any mismatch immediately.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W02, SP01

Coaching outcomes and evidence map

ALIGN / AGREE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

Use this exercise to translate a broad development wish into a small set of useful coaching outcomes. Keep the client's learning goal distinct from business results affected by many people. A goal such as "be more strategic" becomes clearer when connected to an observable leadership behaviour, a situation in which it matters and a fair way to review progress.

FACILITATION SEQUENCE

1. Write the client's desired change in their own words; explore why it matters now.
2. Identify the organisational or personal outcome it should support without promising that coaching alone will produce it.
3. Describe two or three observable behaviours that would show the change in practice.
4. Choose a baseline and an evidence source that the client can access ethically; record who sees the evidence.
5. Agree one first experiment and a review date; check the goal remains owned by the client.

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 development evidence for coaching, not undisclosed selection, promotion or disciplinary decisions.

Coaching outcomes and evidence map

ALIGN / AGREE • 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: _____

Purpose / need

Behaviour / action

Evidence / effect

Review / learning

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

Coaching outcomes and evidence map

ALIGN / AGREE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Behaviour, experience and business outcomes are different evidence categories; keep them separate.

Where no baseline exists, the first action is to collect a small baseline rather than invent a score.

A goal should be renegotiated when role demands change, not preserved only for tidy reporting.

DEBRIEF QUESTIONS

01 What would a colleague actually see you doing differently?

02 What part of the outcome is within your influence?

03 What could improve for reasons unrelated to coaching?

04 What evidence would challenge our positive impression?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director replaces “be more strategic” with “present two evidence-based options and an explicit recommendation at each monthly portfolio meeting”. The baseline is one of the previous three meetings; the next three are reviewed using the same definition.

A NEXT-STEP EXPERIMENT

Run the agreed behaviour in two comparable situations and bring one work artefact or observer example to the next session.

My conclusion from this activity

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

Research basis: R03 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W03, E01, Q12, R02, SP02

Motivation and readiness profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original reflective questionnaire distinguishes wanting an outcome from feeling able and supported to pursue it. It prevents a coach from interpreting every missed action as low motivation. Twelve prompts explore ownership, importance, capability and conditions. The profile supports a conversation about one current goal; it is not a psychometric test or a measure of personality.

FACILITATION SEQUENCE

1. Name one specific goal and use that same goal when answering every item.
2. Rate each statement from 0, not true for me now, to 10, very true for me now; leave an item blank when you cannot answer.
3. Record the four three-item domain means only when at least two items in that domain are answered; mark any two-item mean provisional.
4. Compare the profile with concrete examples and ask which domain the client wishes to discuss, rather than treating the lowest score as a diagnosis.
5. Choose a response: clarify choice, reconnect meaning, build skill, or improve conditions; do not prescribe more willpower 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

Offer a verbal or untimed version. Never infer commitment, employability or mental health from these ratings.

Motivation and readiness profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Rate each statement 0–10: 0 = not at all true of my current situation; 10 = fully true. Use N/A when you cannot answer. Think about the chosen goal now.

NO.	STATEMENT / QUESTION	RATING
MO1	I can explain why I personally choose this goal.	
MO2	I have room to influence how I pursue this goal.	
MO3	I would still value this change without external praise.	
MI1	This goal supports something that matters to me.	
MI2	The likely benefit is worth the effort required.	
MI3	I can explain the cost of leaving the situation unchanged.	
MC1	I know the next behaviour I need to practise.	
MC2	I have evidence that I can learn the required skill.	
MC3	I know where to obtain help with difficult parts.	
MS1	I have enough practical time to take the next step.	
MS2	The people or systems involved make action possible.	
MS3	I can obtain the resources needed for the next step.	

Ownership	Importance	Capability	Conditions
Mean: ____ n: ____	Mean: ____ n: ____	Mean: ____ n: ____	Mean: ____ n: ____

What I notice / context behind my responses

One useful next step or question to discuss

Motivation and readiness profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Do not calculate a total readiness score or use cut-offs; domain means are descriptive discussion aids.

Strong importance with weak conditions suggests a resource or system conversation, not a motivational speech.

High confidence without examples calls for a small test of capability, not uncritical reassurance.

DEBRIEF QUESTIONS

01 Which part of this goal feels chosen rather than imposed?

02 What makes the effort worthwhile?

03 What capability evidence do you already have?

04 What must change around you for action to be realistic?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive rates importance highly but support poorly. She wants to delegate a reporting process, yet no colleague has system access. The agreed action is to resolve access and training, not repeat a commitment to “let go”.

A NEXT-STEP EXPERIMENT

Change one enabling condition this week and repeat only the relevant domain after two weeks, using the same goal and scale.

My conclusion from this activity

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

Research basis: R05 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: W06, SP06

Questions worth sitting with

ALIGN / AGREE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

Executives are often rewarded for speed. This exercise deliberately creates time for a question that does not need an immediate polished answer. It is useful at the beginning of coaching or at a transition, when the client needs to notice what matters before setting a performance target. The coach offers a menu, not an interrogation.

FACILITATION SEQUENCE

1. Invite the client to choose three questions from the prompt bank; allow them to replace any question with their own.
2. Give five quiet minutes to write, sketch or think without preparing an impressive answer.
3. Ask the client which response contains energy, hesitation or surprise; start there with permission.
4. Distinguish what is known, what is hoped and what still needs exploration.
5. Close with one inquiry to carry into the week; an observation task may be more appropriate than a commitment to change.

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 the client's language and permit private reflection. No personal history is required.

Questions worth sitting with

ALIGN / AGREE • 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 I choose

First response

What surprises me

What I am assuming

What remains uncertain

Inquiry for the week

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

Questions worth sitting with

ALIGN / AGREE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Silence and uncertainty are legitimate results, not evidence that the client is unmotivated.

Strong emotion does not automatically make a topic appropriate for coaching; check scope and readiness.

Do not turn a metaphorical answer into a factual claim about the client.

DEBRIEF QUESTIONS

01 What are you protecting that deserves to be protected?

02 What have you outgrown without acknowledging it?

03 What success would not be worth its cost?

04 Whose expectations are most present in your answer?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A newly promoted executive chooses “What success would not be worth its cost?” He identifies constant availability as an unexamined assumption and decides to observe when he responds outside agreed working hours.

A NEXT-STEP EXPERIMENT

Keep a brief observation log for seven days: situation, response and what the chosen question helps you notice.

My conclusion from this activity

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

Research basis: R01 R18 R19 • Conceptual support; this original activity is not independently validated.

Inventory references: W07, SP03

The first-session discovery conversation

ALIGN / AGREE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This structured conversation establishes a useful first picture of the client's role, context and coaching needs. It is not a diagnostic interview. It helps the coach learn how the client wants to work, what success means and what practical conditions could affect the engagement. Use the prompts flexibly and avoid collecting information merely because a form contains a box.

FACILITATION SEQUENCE

1. Explain coaching, confirm voluntary participation and check the working agreement before exploring development needs.
2. Ask about role, responsibilities, stakeholders, current pressures and the change that brought the client to coaching.
3. Explore what is already working, previous learning experiences and preferences for challenge, reflection or practice.
4. Ask what support or adjustments would make participation easier; confirm boundaries around sensitive topics.
5. Summarise the client's priorities in their words, invite corrections and agree the next session and preparation.

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

Collect only necessary information. Do not request diagnostic, family or health details unless relevant, volunteered and appropriately handled.

The first-session discovery conversation

ALIGN / AGREE • ABOUT 60 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: _____

Role and context

Reason for coaching now

Strengths and existing support

Development priorities

Working preferences and adjustments

Agreed next step

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

The first-session discovery conversation

ALIGN / AGREE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Keep hypotheses provisional; a first-session story is a perspective, not a complete organisational diagnosis.

Where the sponsor and client disagree, address the contracting issue explicitly.

If the need is outside coaching competence, discuss suitable referral or complementary support.

DEBRIEF QUESTIONS

01 What do you most want me to understand about your context?

02 When have you learned best from another person?

03 What would make this feel like someone else's agenda?

04 What should we check before choosing an exercise?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A country manager seeks help with confidence. The conversation reveals that decision rights changed after a reorganisation. Coaching explores how to seek clarification while the sponsor addresses the governance ambiguity.

A NEXT-STEP EXPERIMENT

Agree one observation task relevant to the initial goal, and review the usefulness of the coaching approach at the next meeting.

My conclusion from this activity

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

Research basis: R01 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: W11, E02, FA03, SP10

Life satisfaction conversation profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original check-in creates a broad, client-defined picture of current satisfaction. It complements rather than duplicates a coaching wheel: the statements invite discussion of lived experience before the client selects priorities. The ratings are not a wellbeing screen, a clinical measure or a benchmark against other executives.

FACILITATION SEQUENCE

1. Use the past two weeks as the reference period and explain the 0–10 scale: 0 means not satisfied at all; 10 means fully satisfied by my own current standard.
2. Read the eight domains and allow the client to rename a domain before rating; record any change for later comparison.
3. Ask for one example behind each important rating and allow not applicable rather than forcing a number.
4. Discuss which area matters most now; the lowest rating need not be the coaching priority.
5. Agree a small improvement or a boundary to protect, and decide whether and when to revisit the profile.

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 distress is substantial, persistent or outside the coach's competence, pause the exercise and discuss appropriate support.

Life satisfaction conversation profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Rate current satisfaction 0–10: 0 = not at all satisfied; 10 = fully satisfied by your own definition. Use N/A where needed. Discuss what each area means to you.

NO.	STATEMENT / QUESTION	RATING
LS1	How satisfied are you with the contribution your work allows you to make?	
LS2	How satisfied are you with the quality of your important relationships?	
LS3	How satisfied are you with your opportunity to recover from demands?	
LS4	How satisfied are you with the choices available to you?	
LS5	How satisfied are you with opportunities to learn and develop?	
LS6	How satisfied are you with the place of non-work activities in your life?	
LS7	How satisfied are you with the practical stability needed to manage daily life?	
LS8	How satisfied are you with how your current life fits what matters to you?	

What I notice / context behind my responses

One useful next step or question to discuss

Life satisfaction conversation profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Use domain scores individually; do not create a total wellbeing score.

Changes in standards or circumstances can change ratings without a change in underlying experience.

Low satisfaction is an invitation to listen and understand; it is not a diagnosis.

DEBRIEF QUESTIONS

01 What does a satisfying level mean to you in this domain?

02 Where are you comparing yourself with someone else's standard?

03 Which area affects the others most?

04 What would one useful improvement look like?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader is satisfied with work contribution but dissatisfied with recovery. He chooses to protect a weekly non-work commitment and address an avoidable meeting pattern rather than target a perfect score in every domain.

A NEXT-STEP EXPERIMENT

Revisit the selected domain after two weeks alongside a concrete record of the changed behaviour or condition.

My conclusion from this activity

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

Research basis: R01 R05 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: W15, FE09

B

Values, identity and meaning

ASSESS

Explore the person behind the role without treating metaphor as diagnosis.

07 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.

The life chapter map

ASSESS • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A life map helps a client see selected experiences in relation to one another without requiring a chronological autobiography. The emphasis is on meaning the client gives to events today, not on the coach interpreting the causes of their personality. Executives can restrict the map to professional chapters or include other experiences voluntarily.

FACILITATION SEQUENCE

1. Choose the period and boundaries of the map; explicitly permit omissions and private labels.
2. Place up to eight chosen events on a timeline, using short labels rather than detailed personal disclosures.
3. Above each event, record what it taught you; below it, note a resource, relationship or belief that emerged.
4. Look for repeated choices, turning points and exceptions, distinguishing present interpretation from historical fact.
5. Choose one useful theme to carry forward and one old conclusion to examine rather than automatically retain.

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 invite trauma processing. Stop or narrow the activity if the material becomes overwhelming.

The life chapter map

ASSESS • 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: _____

Earlier / context

Recent evidence



Turning point

Now / implication

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

The life chapter map

ASSESS • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A recurring theme is a hypothesis for exploration, not proof of a fixed identity.

Do not interpret gaps or omitted events; they may reflect privacy or relevance.

Use a professional-only map when a broader life narrative is not wanted.

DEBRIEF QUESTIONS

01 Which chapter are you allowing to define the whole story?

02 Where did you respond differently from the usual pattern?

03 What support was present but easy to overlook?

04 What belongs in the next chapter?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director maps three role transitions. She notices that she built relationships well during two transitions but withdrew during the third, when the role was unclear. The inquiry becomes contextual rather than “I am bad at change”.

A NEXT-STEP EXPERIMENT

Write a five-sentence next-chapter description and identify one relationship or resource that would support it.

My conclusion from this activity

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

Research basis: R17 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W04, E03, SP04

A working vocabulary of values

ASSESS • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

Value words are starting points, not precise definitions. This card-sort exercise helps a client name what matters and explain what each chosen word means in behaviour. It is particularly useful across languages, where the same word can carry different expectations. The output is a personal vocabulary to use in later decisions, not a values type.

FACILITATION SEQUENCE

1. Read the original value-word bank and add words that better fit your language or experience.
2. Sort words into important now, possibly important and not a current priority; do not judge the choices.
3. Select up to eight and write a personal definition for each, including an observable example.
4. Compare two values that could compete in a realistic executive decision.
5. Keep a provisional set and test it against the next week's choices before treating it as settled.

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 use value choices to infer protected characteristics or organisational "fit" for employment decisions.

A working vocabulary of values

ASSESS • 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: _____

Value word

My definition

Behaviour that expresses it

Behaviour that contradicts it

A competing value

Decision where it matters

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

A working vocabulary of values

ASSESS • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Value priorities are contextual and may change; a card sort does not reveal an immutable essence.

A claimed value without behavioural examples is a useful inquiry, not a reason to challenge the client's integrity.

Avoid interpreting national, religious or occupational groups through a single values profile.

DEBRIEF QUESTIONS

01 Which word sounds admirable but does not guide your choices?

02 How would a colleague know that this value matters to you?

03 Where do two good values pull in different directions?

04 Which word needs translation into your own language?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader chooses "respect" and defines it as addressing disagreement directly without humiliation. This differs from a colleague's definition of avoiding public disagreement; the distinction becomes useful preparation for a team conversation.

A NEXT-STEP EXPERIMENT

For one week, note two decisions and which of your chosen values each decision expressed or compromised.

My conclusion from this activity

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

Research basis: R07 • Conceptual support; this original activity is not independently validated.

Inventory references: W17, FE10

Values into everyday choices

ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This deeper values exercise moves beyond selecting attractive words. The client uses satisfying and frustrating experiences to identify priorities, then tests those priorities against a real choice. Its purpose is coherence between stated values and behaviour, while recognising that leadership frequently involves trade-offs between legitimate commitments.

FACILITATION SEQUENCE

1. Describe one satisfying experience and one frustrating experience without assigning blame.
2. Ask what mattered in each experience and generate a provisional list of values in the client's own words.
3. Choose five to ten values, define them behaviourally and order them only for the decision currently under discussion.
4. Test two realistic options against the values, naming both benefits and sacrifices.
5. Choose a behaviour that expresses an important value this week and a boundary that protects another.

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 difficult circumstances are caused by the client failing to live authentically.

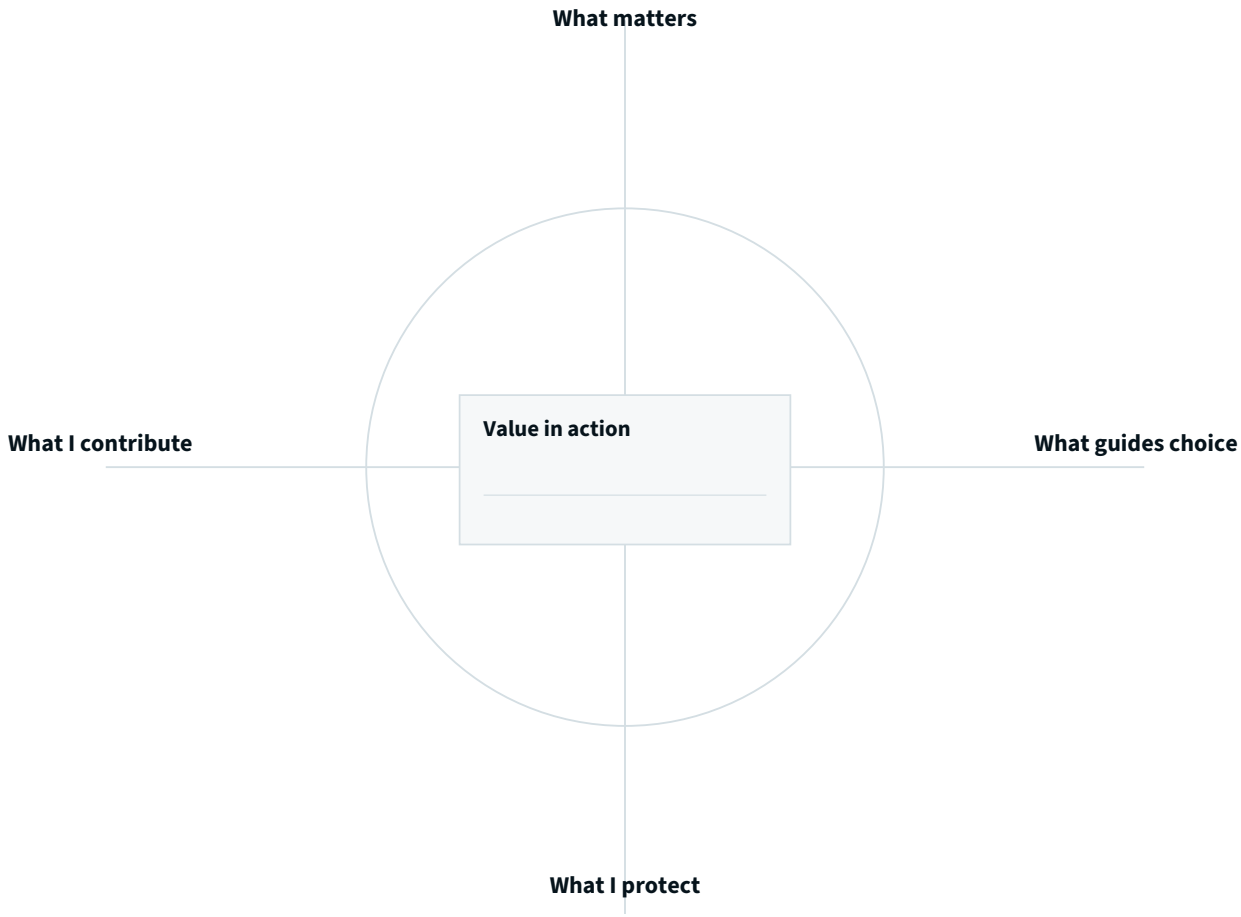
Values into everyday choices

ASSESS • 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: _____



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

Values into everyday choices

ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Priority order is decision-specific; do not add scores to produce a moral ranking.

A mismatch between values and current behaviour may reflect constraint, habit or competing commitments.

The next step should test a value in action, not simply refine the vocabulary.

DEBRIEF QUESTIONS

01 What did the satisfying experience allow you to express?

02 What value may have been frustrated rather than absent?

03 Which trade-off can you acknowledge openly?

04 How could you honour a value without demanding perfection?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director values fairness and loyalty. When a long-serving colleague misses standards, she decides that a clear, supported performance conversation honours both values better than avoiding the issue.

A NEXT-STEP EXPERIMENT

Use the chosen value in one real decision; record the action, the cost accepted and the response you observed.

My conclusion from this activity

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

Research basis: R07 R05 • Conceptual support; this original activity is not independently validated.

Inventory references: D01, IG05

Meaning through an image or symbol

ASSESS • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A client-chosen image can provide language for an experience that is difficult to describe directly. This exercise uses a drawing, remembered image or optional dream fragment as a metaphor. The client supplies the meaning. It does not interpret dreams, access hidden truth, predict events or establish facts about other people.

FACILITATION SEQUENCE

1. Ask permission to work with an image and offer an ordinary workplace object as an alternative to dream material.
2. Invite the client to describe or sketch the image, naming what stands out without explaining it yet.
3. Ask what the image means to them and what other meanings remain possible.
4. Connect one aspect of the image to a current leadership situation using a tentative statement.
5. Translate the metaphor into an observable question or a small action, and check that the client finds it useful.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Do not analyse disturbing dreams or unusual perceptions clinically. Return to present, ordinary observations and appropriate support when needed.

Meaning through an image or symbol

ASSESS • 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: _____

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

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

Meaning through an image or symbol

ASSESS • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

An image is reflective material, not evidence of a hidden motive or external event.

If the client does not experience images, use words, a neutral object or a written comparison.

Retain only the meaning the client finds useful; no symbolic dictionary is needed.

DEBRIEF QUESTIONS

01 What does this image mean to you, rather than to me?

02 Which detail seems most relevant today?

03 Where does the metaphor stop being useful?

04 What real-world observation would help you test the insight?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive sketches a crowded doorway. She sees it as a metaphor for every decision passing through her. The practical inquiry is which decisions can be delegated, not what doors supposedly symbolise.

A NEXT-STEP EXPERIMENT

Observe one situation linked to the metaphor and record whether the interpretation helps explain it or needs revision.

My conclusion from this activity

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

Research basis: R01 R17 • Conceptual support; this original activity is not independently validated.

Inventory references: D04

Meaning through an image or symbol

Read or adapt the text below within the agreed purpose and professional boundaries.

Choose whether an image-based reflection is useful today. You may keep your eyes open and use a word, object or sketch instead. Think of the professional question you brought, without trying to solve it immediately. [Quiet reflection for one minute.] Let an ordinary image, scene or object come to mind, or choose one deliberately. There is no hidden message you are required to discover. [Quiet reflection for one minute.] Notice what meaning you personally give the image. What part of the situation does it represent, and what does it leave out? [Quiet reflection for one minute.] Return your attention to the room and make a simple sketch or write a few words. We will now examine the meaning you chose against the facts of the situation. You decide what to share. The image is a prompt for reflection, not evidence about your unconscious or a prediction.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A moment of effective leadership

ASSESS • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This exercise retrieves a specific episode in which the client led effectively and examines what made it work. It is not a general positive affirmation. Detailed attention to behaviour, preparation and support produces a usable resource for a future challenge. An optional short rehearsal is included, with eyes open and a verbal alternative available.

FACILITATION SEQUENCE

1. Choose one manageable memory of effective leadership; avoid demanding a peak life experience.
2. Describe the situation, what you did and what others could have observed.
3. Identify the preparation, relationships and conditions that contributed to the outcome.
4. Select one transferable behaviour and rehearse using it in an upcoming situation.
5. Name what will be different in the new context and what additional preparation is still required.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Keep imagery optional. No promise is made that recalling success will create a particular emotional state.

A moment of effective leadership

ASSESS • 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 / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

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

A moment of effective leadership

ASSESS • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Confidence should be grounded in a specific capability and its conditions, not inflated into “I can do anything”.

A positive outcome can involve luck; separate controllable behaviour from external factors.

If no example comes easily, start with a small competent moment or an observer’s concrete example.

DEBRIEF QUESTIONS

01 What did you actually do that made a difference?

02 What support deserves recognition?

03 Which part can transfer and which cannot?

04 What evidence will show whether the behaviour works this time?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director recalls resolving a customer escalation by clarifying the decision and summarising competing interests. She rehearses the same two behaviours for a governance meeting, while recognising that the authority structure is different.

A NEXT-STEP EXPERIMENT

Practise the transferable behaviour once before the live event and request feedback on that behaviour afterwards.

My conclusion from this activity

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

Research basis: R08 R20 • Conceptual support; this original activity is not independently validated.

Inventory references: D05

A moment of effective leadership

Read or adapt the text below within the agreed purpose and professional boundaries.

Recall a specific professional moment when you acted effectively. Choose an ordinary event rather than a perfect performance. Where were you, and what was the task? [Pause.] Notice what you actually said or did, the information you used and the support available. [Pause.] What happened next, and what evidence suggests your contribution helped? [Pause.] Now separate the behaviour from the surrounding conditions. Which part could you practise again, and which part depended on that situation? [Pause.] Return to the current question. Choose one behaviour to rehearse in a realistic future situation, including how you will respond if the first attempt is imperfect.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

The qualities you choose to carry

ASSESS • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original prioritisation journey addresses the identity and valued-qualities purpose of the inventoried fantasy exercise without reproducing its story. The client chooses which qualities they most want to carry into a demanding next chapter. The activity is an imaginative sorting method, not a test of character or proof of an essential self.

FACILITATION SEQUENCE

1. Write ten qualities you value in how you work and relate to people; support at least three with examples.
2. Imagine preparing for a demanding new role with room for only seven written quality cards; choose and explain the trade-offs.
3. Reduce the selection to five, then identify the three that matter most for the specific challenge ahead.
4. Restore all ten cards: nothing has actually been lost. Explore what the choices reveal about current priorities.
5. Choose one way to express a retained quality and one neglected quality that deserves attention.

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 a neutral transition metaphor. Do not introduce threatening characters, identity loss or humiliation.

The qualities you choose to carry

ASSESS • 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: _____

Start broadly

Choose what matters

Make the trade-off explicit

Retain the priority

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

The qualities you choose to carry

ASSESS • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The exercise reveals a choice made in a context, not a stable hierarchy of personal worth.

The restore step matters: prioritising a quality does not mean rejecting the others.

If forced choice feels unhelpful, use a flexible grouping instead of elimination.

DEBRIEF QUESTIONS

01 Which quality was hardest to put aside temporarily?

02 What did the situation make more important?

03 What would overusing this quality look like?

04 Which quality needs a partner quality to work well?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A newly appointed leader prioritises steadiness, candour and curiosity. He notices that he had omitted warmth because he associated seniority with distance. He chooses to combine clear decisions with more deliberate personal contact.

A NEXT-STEP EXPERIMENT

Ask a trusted colleague for one example of the selected quality in your behaviour and one situation where it would help to express it more clearly.

My conclusion from this activity

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

Research basis: R07 R08 • Conceptual support; this original activity is not independently validated.

Inventory references: D07, E25

A leadership purpose statement

ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A purpose statement is useful when it guides a choice, not when it merely sounds impressive. This exercise helps a client articulate whom they serve, the contribution they wish to make, how they intend to work and what boundaries they will respect. It can be used for personal leadership or adapted to a business-owner context.

FACILITATION SEQUENCE

1. Identify the people or outcomes you most want your leadership to serve.
2. Describe the contribution you are well placed to make, using evidence from experience.
3. Choose two or three principles that should shape how you make that contribution.
4. Draft a short statement in plain language and test it against a real trade-off.
5. Revise any vague wording and identify one behaviour that would make the statement visible this month.

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

A purpose statement does not override professional duties, governance or the needs of other stakeholders.

A leadership purpose statement

ASSESS • 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: _____

My contribution / who benefits / what I choose to stand for

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

A leadership purpose statement

ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A useful statement is specific enough to influence behaviour but not so narrow that it becomes a job description.

Do not judge the statement by elegance alone; test it against competing options.

A business purpose statement should be checked with relevant stakeholders rather than treated as the owner's private truth.

DEBRIEF QUESTIONS

01 Would this statement help you say no to anything?

02 What would others see if you lived it?

03 Which phrase sounds borrowed rather than yours?

04 What tension must the statement acknowledge?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director drafts "I help teams make clear decisions that improve service, while developing people's ability to decide without me." She tests it against retaining an approval step and chooses a bounded delegation experiment.

A NEXT-STEP EXPERIMENT

Use the statement in one real decision and record whether it changed the choice, the conversation or neither.

My conclusion from this activity

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

Research basis: R07 R03 • Conceptual support; this original activity is not independently validated.

Inventory references: M02, E23, Q20

C

Vision, goals and direction

ALIGN / ACTIVATE

Turn a preferred future into choices, credible goals and testable plans.

13 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.

The annual direction planner

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

PURPOSE AND INTRODUCTION

An annual plan should establish direction without pretending that twelve months can be predicted in detail. This exercise connects a small number of outcomes with capacity, dependencies and review points. It includes work and non-work commitments so that the plan does not depend on permanently borrowing time from recovery or relationships.

FACILITATION SEQUENCE

1. Review the previous year: outcomes, unfinished commitments, learning and changed circumstances.
2. Choose no more than four meaningful outcomes and state why each matters.
3. Identify a milestone for each quarter, distinguishing committed work from provisional intentions.
4. Estimate capacity and dependencies; remove or postpone something if the plan exceeds what is realistic.
5. Agree a first-month action and a quarterly review rule for retaining, changing or stopping goals.

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 financial, medical and legal decisions within the relevant professional's remit.

The annual direction planner

ALIGN / 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: _____

Jan	**Feb**	**Mar**	**Apr**
May	**Jun**	**Jul**	**Aug**
Sep	**Oct**	**Nov**	**Dec**

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

The annual direction planner

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

INTERPRET THE RESULT CAREFULLY

A plan is a set of choices, not a catalogue of aspirations.

Quarterly milestones may be learning milestones where uncertainty is high.

Do not interpret an appropriate change of goal as failure.

DEBRIEF QUESTIONS

01 What are you deliberately not pursuing this year?

02 Which outcome depends on someone else's decision?

03 What would make this plan unsustainable?

04 What evidence would justify changing direction?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director selects service reliability, successor development and a sustainable travel pattern. She postpones an optional qualification because the combined workload would otherwise undermine all three priorities.

A NEXT-STEP EXPERIMENT

At the end of the first month, compare planned and actual capacity and revise one assumption.

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: V01

The next 90 days

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

PURPOSE AND INTRODUCTION

A three-month horizon is long enough to support a meaningful change and short enough to make immediate choices visible. This exercise creates a grounded picture of the next quarter across work and life. It begins with experience and behaviour, then translates the picture into a small number of outcomes and first steps.

FACILITATION SEQUENCE

1. Describe an ordinary day at the end of the next 90 days if things have improved in a realistic way.
2. Identify what is different in work, relationships, recovery and one client-chosen area.
3. Choose up to three outcomes; define a visible sign for each.
4. Work backwards to a 60-day check, a 30-day milestone and the first seven days.
5. Name obstacles, support and what you will stop doing to make room.

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

Include constraints the client cannot change; do not frame every obstacle as a mindset problem.

The next 90 days

ALIGN / 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: _____

Starting point	→	Next useful step	→	Evidence / milestone	→	Review / decision

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

The next 90 days

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

INTERPRET THE RESULT CAREFULLY

Use a desired future as a direction, not a prediction.

Reduce the number of goals when the plan relies on unrealistic capacity.

Track behaviour and conditions as well as whether the final outcome occurs.

DEBRIEF QUESTIONS

01 What would be different on an ordinary Tuesday?

02 Which change matters most to the rest?

03 What are you assuming will become easier by itself?

04 What can begin within seven days?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader's 90-day picture includes fewer late approvals and a team that resolves routine issues independently. The first month focuses on decision boundaries and a weekly review rather than immediate withdrawal from all approvals.

A NEXT-STEP EXPERIMENT

Complete the first seven-day action and bring evidence of what it revealed about the plan.

My conclusion from this activity

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

Research basis: R03 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: V02, S01, E10, R03, R12

The long view and the next step

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

PURPOSE AND INTRODUCTION

This perspective exercise links a distant direction with choices that can be made now. It is useful when a client is busy but uncertain whether current activity supports the future they value. Use a horizon of five to ten years, or another period meaningful to the client; the map is not a forecast.

FACILITATION SEQUENCE

1. Describe a broad future direction in work, relationships, contribution and lifestyle without insisting on a job title.
2. Identify capabilities, relationships and conditions that could support that direction.
3. Ask which of these need patient development rather than last-minute effort.
4. Choose a one-year priority and a 90-day experiment that would provide useful information.
5. Define a near-term action that is worthwhile even if the distant future 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

Do not provide investment, tax, immigration or retirement-finance advice through this exercise.

The long view and the next step

ALIGN / 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: _____

Earlier / context

Recent evidence



Turning point

Now / implication

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

The long view and the next step

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

INTERPRET THE RESULT CAREFULLY

A distant vision should guide learning, not justify rigid commitments.

An action with value across several futures is often safer than a large irreversible bet.

Do not treat uncertainty as a lack of ambition.

DEBRIEF QUESTIONS

01 What might your future self thank you for starting now?

02 Which part of the vision is yours and which is inherited?

03 What could remain valuable across several possible futures?

04 What evidence would change your view?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive considering a future portfolio career identifies commercial judgement, a broader network and a financial-advice conversation as preparatory needs. Her coaching action is to test an advisory project within existing employment boundaries.

A NEXT-STEP EXPERIMENT

Complete one low-risk exploration and record what it confirms, challenges and leaves unanswered.

My conclusion from this activity

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

Research basis: R03 R17 • Conceptual support; this original activity is not independently validated.

Inventory references: V03

The goal beneath the goal

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

PURPOSE AND INTRODUCTION

A visible goal can stand for something less obvious: contribution, security, recognition, freedom or belonging. This exercise helps a client explore what they hope the goal will provide, without assuming the coach knows the hidden motive. Understanding the underlying need can reveal alternative routes and more honest trade-offs.

FACILITATION SEQUENCE

1. Write the stated goal and describe the outcome you expect from achieving it.
2. Ask what that outcome would make possible; continue only while the client finds the exploration useful.
3. Separate practical benefits, emotional hopes, social expectations and assumptions.
4. Generate at least one alternative way of meeting an important underlying need.
5. Decide whether to retain, revise or replace the goal and identify the next test.

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 repeated "why" questioning that feels accusatory or forces a neat hidden explanation.

The goal beneath the goal

ALIGN / 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: _____



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

The goal beneath the goal

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

INTERPRET THE RESULT CAREFULLY

The underlying meaning is a client hypothesis, not a coach's diagnosis.

A status goal is not automatically shallow; explore what it represents.

An alternative route can supplement rather than replace the original goal.

DEBRIEF QUESTIONS

01 What are you hoping this achievement will give you?

02 Could that need be met in another way?

03 What might still be unresolved after success?

04 What cost are you willing or unwilling to accept?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director wants a larger title but identifies influence over service design as the central benefit. She explores both promotion and a cross-functional mandate rather than assuming title is the only route.

A NEXT-STEP EXPERIMENT

Hold one information-gathering conversation that tests an assumed link between the goal and its hoped-for benefit.

My conclusion from this activity

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

Research basis: R05 R07 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: V04

A clear and workable goal

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

PURPOSE AND INTRODUCTION

This goal-editing activity uses a practical SMART check while adding ownership, feasibility and unintended consequences. It is suitable after the client has chosen a meaningful direction. A well-worded target is not enough: the client also needs a plausible way to act, feedback and permission to revise the goal when circumstances change.

FACILITATION SEQUENCE

1. Write the goal in one sentence and identify the behaviour or outcome being sought.
2. Check specificity: who will do what, in which situation and to what standard.
3. Choose a measure, baseline and date; use a learning question when a numerical target would create false precision.
4. Check feasibility, relevance, resources, dependencies and possible adverse effects.
5. Rewrite the goal and specify the first action, review point and reason for stopping or revising it.

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 that the goal does not conflict with safety, quality, fairness or professional obligations.

A clear and workable goal

ALIGN / 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: _____

Specific change

Meaning and ownership

Evidence and date

Feasibility and safeguards

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

A clear and workable goal

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

INTERPRET THE RESULT CAREFULLY

SMART is a checking heuristic, not a psychometric or universally sufficient goal model.

For complex new work, a learning goal may be more useful than a premature performance target.

Do not attach a number merely to make a goal look rigorous.

DEBRIEF QUESTIONS

01 Could another person understand what completion means?

02 What behaviour could this target accidentally encourage?

03 Which part requires learning before commitment?

04 What would count as useful progress short of the final result?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

“improve communication” becomes “at each of the next four team meetings, state the decision, owner and next review point, then ask one colleague whether these were clear”.

A NEXT-STEP EXPERIMENT

Try the first behaviour once and revise the wording if the measure does not capture what matters.

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: V05, IG01, IG09

The later-life perspective

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

PURPOSE AND INTRODUCTION

This optional future-self visualisation explores what a client may wish to have valued over a longer life. It is a perspective-taking exercise, not a prediction of retirement, health or lifespan. The client may imagine a later chapter rather than a particular age. A written alternative is available for people who do not visualise.

FACILITATION SEQUENCE

1. Agree a comfortable future horizon and explain that the client can keep eyes open, write or stop.
2. Read the short script slowly, allowing silence rather than adding your own interpretations.
3. Invite the client to record what they valued, what they were glad to have done and what they would not want to neglect.
4. Compare the imagined perspective with current choices and identify one tension.
5. Choose a small present-day action; check that it is sensible in the client's actual circumstances.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Offer a neutral future-chapter exercise if later-life imagery feels uncomfortable or inappropriate.

The later-life perspective

ALIGN / 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: _____

Capture the imagined scene in words or a sketch. Mark it as imagined, not predicted.

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

The later-life perspective

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

INTERPRET THE RESULT CAREFULLY

Treat the imagined future as reflective material, not a forecast or instruction.

Do not use mortality or regret to pressure the client into a decision.

A practical action should survive a check against current responsibilities.

DEBRIEF QUESTIONS

01 What mattered that is easy to overlook in the current role?

02 Which imagined regret is useful information rather than a threat?

03 What does this perspective suggest, but not prove?

04 What small action would honour the insight?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader imagines valuing relationships with former colleagues more than the number of projects completed. She chooses to make time for mentoring rather than abandon an important current delivery commitment.

A NEXT-STEP EXPERIMENT

Complete one action connected to the chosen value within the next week and review how it fits real life.

My conclusion from this activity

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

Research basis: R07 R17 • Conceptual support; this original activity is not independently validated.

Inventory references: V06, E08, E52, V06a

The later-life perspective

Read or adapt the text below within the agreed purpose and professional boundaries.

Choose a later chapter of your life that feels comfortable to imagine. You do not need to see a picture. You may simply think in words. Imagine having some distance from today's immediate demands. [Pause.] Notice what you are pleased to have contributed, learned or protected. Let the answer be modest if that is what feels true. [Pause.] Consider the people and activities that gave this chapter meaning. What did you make room for? [Pause.] Look back towards your present situation. What deserves a little more attention now? What may deserve a little less? [Pause.] There is no instruction hidden in this image. Bring back only an observation that feels useful. Notice the room, your seat and the present moment. When ready, write one thought you would like to examine.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

The contribution people remember

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

PURPOSE AND INTRODUCTION

This future-appreciation exercise explores the contribution a client wants colleagues to remember. It can use a retirement gathering, a project handover or the end of a leadership assignment. The focus is not on admiration or invented praise, but on observable ways the client would like to have helped people and work.

FACILITATION SEQUENCE

1. Choose an ending that is relevant and comfortable: a role transition, project completion or later-career gathering.
2. Imagine three perspectives: a colleague, someone you developed and a stakeholder affected by your work.
3. Write what each person might genuinely value, using specific behaviours rather than flattering adjectives.
4. Identify where current behaviour supports or contradicts the desired contribution.
5. Choose one behaviour to practise and one real person from whom to seek feedback.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Do not pressure the client to imagine death or an emotionally difficult ending.

The contribution people remember

ALIGN / 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: _____

Ending I imagine

Colleague perspective

Person I developed

Stakeholder perspective

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

The contribution people remember

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

INTERPRET THE RESULT CAREFULLY

This is a values exercise, not evidence of what others actually think.

Include stakeholders who may experience costs as well as benefits.

Replace a broad reputation goal with a behaviour the client can practise.

DEBRIEF QUESTIONS

01 What would they describe you doing, not merely being?

02 Whose perspective have you omitted?

03 What would make the appreciation believable?

04 How can you seek real feedback rather than rely on imagination?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader wants a successor to say she created room to decide. She notices that she still attends every operational meeting and designs a gradual handover with clear escalation boundaries.

A NEXT-STEP EXPERIMENT

Ask one trusted colleague what behaviour most helps them and what you could do differently; compare this with the imagined contribution.

My conclusion from this activity

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

Research basis: R07 R11 • Conceptual support; this original activity is not independently validated.

Inventory references: V06, E08, E52, V06b

The contribution people remember

Read or adapt the text below within the agreed purpose and professional boundaries.

Imagine the end of a meaningful assignment. You are listening to a few people describe what your contribution made possible. [Pause.] Hear a colleague describe one specific action that helped the team. [Pause.] Hear someone you supported describe what they learned to do for themselves. [Pause.] Hear a stakeholder describe a practical difference in their experience. [Pause.] Now step back. These are possibilities, not actual testimonials. Which behaviour would make one of these accounts more likely? What real feedback would you need? Return to the present and write the contribution you want to test through action.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A future headline with evidence

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

PURPOSE AND INTRODUCTION

This imaginative writing exercise asks the client to describe a future achievement as if it were a short article. It prevents the vision from remaining an abstract slogan by requiring evidence, stakeholders, obstacles and contribution. The article is explicitly fictional and should not be used as a testimonial or public claim.

FACILITATION SEQUENCE

1. Choose a realistic future date and a meaningful achievement or change.
2. Write a headline and a short opening paragraph describing what happened and why it matters.
3. Add three pieces of evidence a responsible journalist would need to verify the story.
4. Include a paragraph about obstacles, contributions from others and costs or trade-offs.
5. Work backwards to the next action that would make one part of the story more plausible.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Label all imagined articles as fictional; never present invented quotes as actual stakeholder statements.

A future headline with evidence

ALIGN / 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: _____

FUTURE STORY: headline, evidence and an explicitly imagined perspective.

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

A future headline with evidence

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

INTERPRET THE RESULT CAREFULLY

A compelling narrative is not a business case or proof of feasibility.

Evidence requirements can become milestones in the action plan.

The exercise is strongest when it includes uncertainty and collaboration, not only triumph.

DEBRIEF QUESTIONS

01 Which claim in the article is currently least supported?

02 Who deserves credit beyond you?

03 What would a sceptical reader ask?

04 What can you test before committing to the whole story?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director drafts an article about a service turnaround. The evidence paragraph identifies response times, customer comments and team capability. She discovers that she needs a baseline before setting a credible target.

A NEXT-STEP EXPERIMENT

Gather one piece of baseline evidence named in the article and revise the headline if necessary.

My conclusion from this activity

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

Research basis: R03 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: V06, E08, E52, V06c

A future headline with evidence

Read or adapt the text below within the agreed purpose and professional boundaries.

Think of a future date at which a useful change has happened. Imagine reading a short, factual account of it. [Pause.] What changed for people who use the service, work with you or depend on the decision? [Pause.] What evidence makes the story credible? Who else contributed? [Pause.] Let the story include a difficulty that was handled rather than pretending everything was easy. [Pause.] Return to today. What is the first piece of evidence, conversation or experiment needed to begin? Write the headline and then the facts that would have to support it.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

Ambition without premature censorship

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

PURPOSE AND INTRODUCTION

Idea generation and commitment are different tasks. This exercise temporarily suspends feasibility judgement so that a client can discover goals they usually dismiss too quickly. It then restores practical judgement before any action is chosen. The purpose is a broader option set, not encouragement to take reckless risks.

FACILITATION SEQUENCE

1. Set a short time limit and generate possible goals without evaluating them; include modest, bold and unusual possibilities.
2. Choose three that create genuine interest and describe the need or value each serves.
3. Separate the attractive essence of each idea from its most extravagant form.
4. Test the options against responsibilities, resources, risks and stakeholders.
5. Design a small reversible experiment for one option rather than making a large immediate commitment.

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 excitement to override financial, family, contractual or health constraints.

Ambition without premature censorship

ALIGN / 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: _____

Unfiltered ideas

Three that attract me

Need or value underneath

Practical constraints

Small test

Decision after the test

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

Ambition without premature censorship

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

INTERPRET THE RESULT CAREFULLY

Interest is information, not a command to act.

The evaluation phase is essential; creative freedom does not remove responsibility.

A small experiment can test an idea without declaring it the client's new life direction.

DEBRIEF QUESTIONS

01 What did you reject before giving it a fair hearing?

02 What is attractive about the idea beneath its dramatic form?

03 What would a safe miniature version look like?

04 What result would tell you not to continue?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive's bold idea is to leave corporate work to teach. The underlying attraction is helping others learn. She tests a mentoring workshop before considering any employment change.

A NEXT-STEP EXPERIMENT

Run a low-cost, reversible test and record interest, practical demands and feedback from those involved.

My conclusion from this activity

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

Research basis: R19 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: V08

Twenty-one goal-quality questions

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

PURPOSE AND INTRODUCTION

This structured review uses twenty-one original questions to challenge a proposed goal from seven angles: ownership, meaning, definition, evidence, feasibility, impact and follow-through. It is a menu for thoughtful review, not a pass/fail checklist. The coach should select the questions that address genuine uncertainty rather than ask all twenty-one mechanically.

FACILITATION SEQUENCE

1. Write the proposed goal at the top of the worksheet.
2. Read the seven groups and select the two that contain the most uncertainty.
3. Use the three questions in each selected group, recording facts separately from assumptions.
4. Revise the goal where the discussion reveals ambiguity, unrealistic demand or unintended effects.
5. Record what is now clear and what must be tested before commitment.

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

BOUNDARY AND CARE

Use a subset in session and the rest as optional reflection; avoid overwhelming the client.

Twenty-one goal-quality questions

ALIGN / 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: _____

Ownership

Meaning

Definition

Evidence

Feasibility

Impact

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

Twenty-one goal-quality questions

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

INTERPRET THE RESULT CAREFULLY

Unanswered questions may identify a useful learning goal rather than invalidate the whole ambition.

Do not add the number of satisfactory answers into a readiness score.

A goal can be meaningful but poorly timed; timing is a legitimate decision.

DEBRIEF QUESTIONS

01 Which question changed how you understand the goal?

02 What remains an assumption rather than a fact?

03 What is the most important revision?

04 What must be learned before you commit further?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader reviews a target to accelerate approvals. The impact questions reveal a risk of bypassing quality checks. The goal is revised to remove avoidable delay while preserving required review.

A NEXT-STEP EXPERIMENT

Test the most uncertain assumption and update the goal before the next coaching review.

My conclusion from this activity

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

Research basis: R03 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: V09, FQ01

Reasons, beneficiaries and costs

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

PURPOSE AND INTRODUCTION

This exercise clarifies the reasons for a goal by considering personal meaning, benefit to others and the cost of both action and inaction. It differs from the deeper goal-beneath-the-goal inquiry: here the focus is a balanced, explicit rationale that can support a practical decision.

FACILITATION SEQUENCE

1. Write the goal and list the reasons you currently give for pursuing it.
2. Separate your own reasons from expectations you have accepted from others.
3. Identify who may benefit, who may carry a cost and whose perspective is missing.
4. Compare the likely costs of acting with the costs of leaving things unchanged.
5. Write a balanced rationale and decide whether the goal still deserves commitment.

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 frame ambivalence as resistance or use the exercise to persuade the client towards the coach's preferred goal.

Reasons, beneficiaries and costs

ALIGN / 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: _____

Benefits / reasons to choose

Costs / reasons to reconsider

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

Reasons, beneficiaries and costs

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

INTERPRET THE RESULT CAREFULLY

A convincing rationale acknowledges costs rather than trying to eliminate ambivalence.

A sponsor's priority can be legitimate without becoming the client's only reason.

The client may decide not to pursue the goal after clarification.

DEBRIEF QUESTIONS

01 Which reason remains when external approval is removed?

02 Who may experience this goal differently from you?

03 What cost are you minimising in your account?

04 What would make you reconsider?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager wants a promotion partly for status and partly to influence service quality. She recognises the increased travel cost and negotiates the role conditions before deciding whether to apply.

A NEXT-STEP EXPERIMENT

Hold one conversation with an affected person or gather one fact about an assumed cost before finalising the decision.

My conclusion from this activity

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

Research basis: R05 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: V10, E14, FE13

From intention to a tested commitment

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

PURPOSE AND INTRODUCTION

This commitment exercise combines a clear goal with obstacles, an implementation plan and a review rule. It addresses the function of the inventoried goal-commitment tool using an original sequence. It is most useful after the client has decided that the goal is genuinely worth pursuing.

FACILITATION SEQUENCE

1. State the goal, the first observable action and why it matters.
2. Imagine the desired outcome briefly, then identify the most likely internal and external obstacles.
3. Choose one obstacle that can be addressed now and write an if–then response tied to a recognisable cue.
4. Schedule the action and identify the support or permission required.
5. Define how you will review the attempt, including when to adapt, stop or ask for help.

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

Plans must be safe, ethical and within the client's authority.

From intention to a tested commitment

ALIGN / 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: _____

WHEN this cue or obstacle appears…

THEN I will try this behaviour…

Because it supports…

I will review this evidence…

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

From intention to a tested commitment

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

INTERPRET THE RESULT CAREFULLY

An implementation plan supports action but does not remove structural barriers.

A missed attempt is information about the plan, not a verdict on character.

Avoid creating many competing if–then plans at once; start with one important obstacle.

DEBRIEF QUESTIONS

01 What is most likely to interrupt the plan?

02 Will you recognise the cue when it occurs?

03 Is the response small and specific enough to perform?

04 What would a sensible adjustment look like after a missed attempt?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director plans to ask a clarifying question before taking over a team decision. Her cue is noticing the urge to provide the answer; her response is to ask, “What options have you considered?”

A NEXT-STEP EXPERIMENT

Use the cue-based response in three relevant situations and record what happened, including occasions when the cue was missed.

My conclusion from this activity

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

Research basis: R04 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: M07, E15, Q22

Turn a career vision into a development route

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

PURPOSE AND INTRODUCTION

A career vision becomes useful when translated into capabilities, evidence, relationships and opportunities for practice. This exercise avoids assuming that ambition alone produces access to a role. It creates a development route that recognises organisational criteria, timing and factors outside the client's control.

FACILITATION SEQUENCE

1. Describe the desired future role or contribution and identify what is currently known about its requirements.
2. Separate capability requirements, experience requirements, relationships and access conditions.
3. Compare each requirement with current evidence rather than confidence alone.
4. Choose two development priorities and identify real work through which to practise them.
5. Agree evidence to collect and a review conversation that can test progress and remaining gaps.

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 confidentiality, conflicts and employment obligations before external networking or project work.

Turn a career vision into a development route

ALIGN / 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: _____

Starting point	→	Next useful step	→	Evidence / milestone	→	Review / decision

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

Turn a career vision into a development route

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

INTERPRET THE RESULT CAREFULLY

The map is a development plan, not a promise of appointment.

A capability gap and an opportunity gap require different responses.

Use real role criteria where available; avoid building the plan entirely around imagined expectations.

DEBRIEF QUESTIONS

01 Which requirement is verified and which is assumed?

02 What experience would demonstrate readiness?

03 Who can provide an informed view without promising an outcome?

04 What could make this route valuable even without promotion?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An HR leader seeking a regional role identifies cross-country stakeholder work and commercial planning as evidence gaps. She negotiates a bounded project that can develop both while maintaining current delivery.

A NEXT-STEP EXPERIMENT

Confirm one assumed requirement with an appropriate person and secure one practice opportunity.

My conclusion from this activity

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

Research basis: R17 R03 R08 • Conceptual support; this original activity is not independently validated.

Inventory references: E09

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

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

What I need to check or understand better

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

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

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

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.

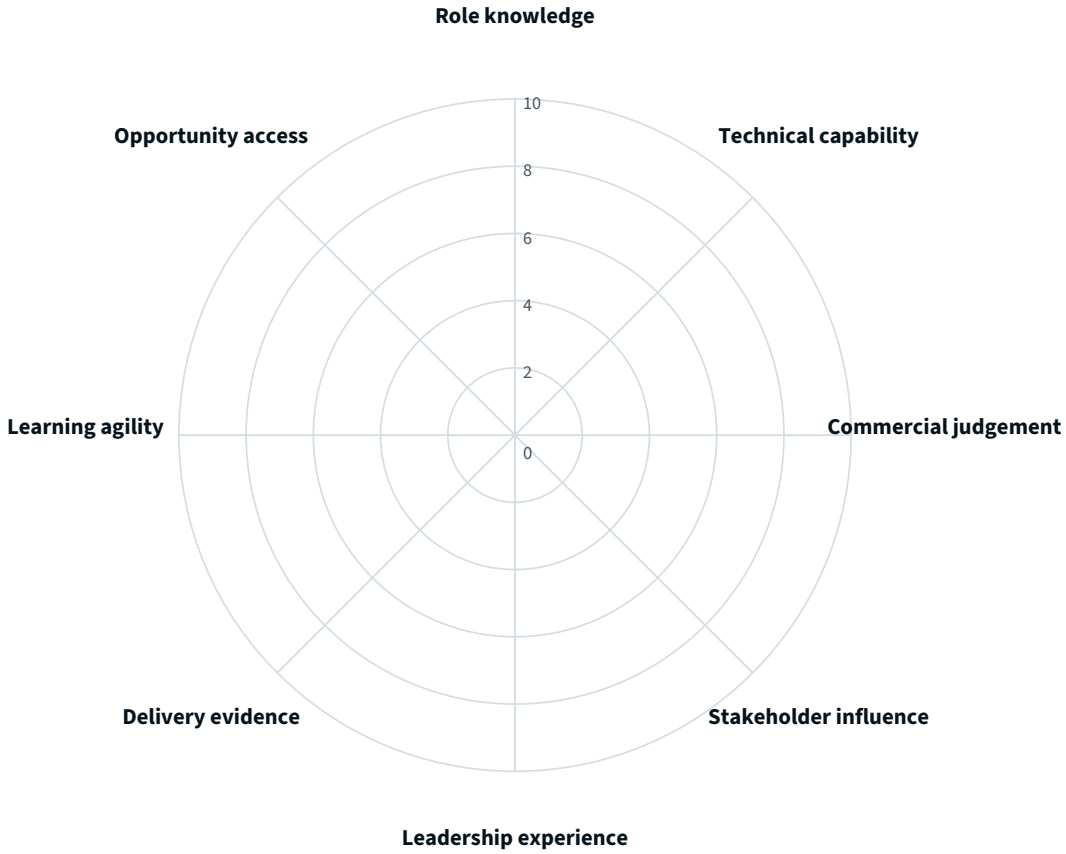
The career development wheel

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

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

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

Behaviour used

Value created

Evidence and feedback

Overuse risk

Next application

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

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

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: 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

Option 2

Option 3

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 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

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

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

Weaknesses — internal

Opportunities — external

Threats — external

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

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

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

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

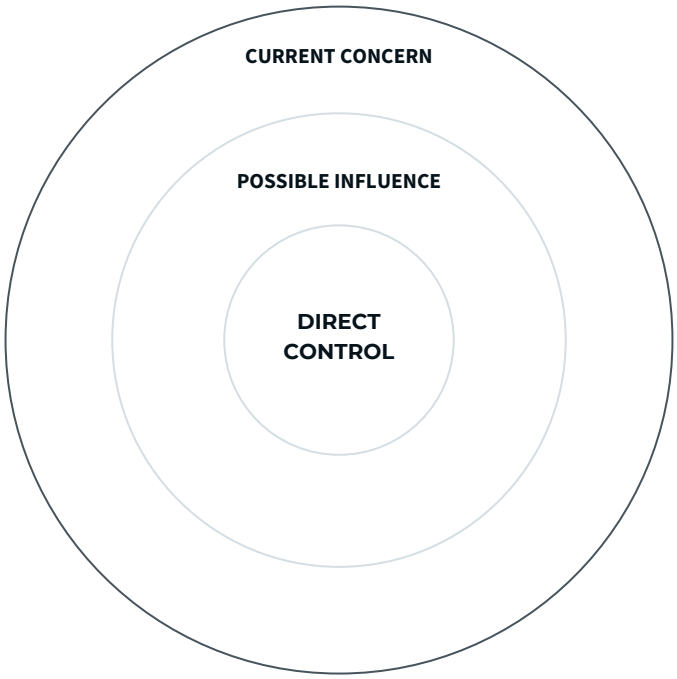
ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

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

What I need to check or understand better

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

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

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.	
FB2	Explains the reasoning behind important changes.	
FB3	Invites relevant views before deciding.	
FB4	Listens without interrupting or dismissing concerns.	
FB5	Delegates with clear boundaries and support.	
FB6	Follows through on agreed commitments.	
FB7	Addresses difficulties respectfully and promptly.	
FB8	Uses feedback to make a visible adjustment.	

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

What I notice / context behind my responses

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.

Manage a development gap intelligently

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: _____

Develop

Redesign / obtain help

Accept with safeguards

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

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

Specific example

Behaviour identified

Conditions that helped

Possible strength

Next test

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

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: _____

Earlier / context

Recent evidence



Turning point

Now / implication

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

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.

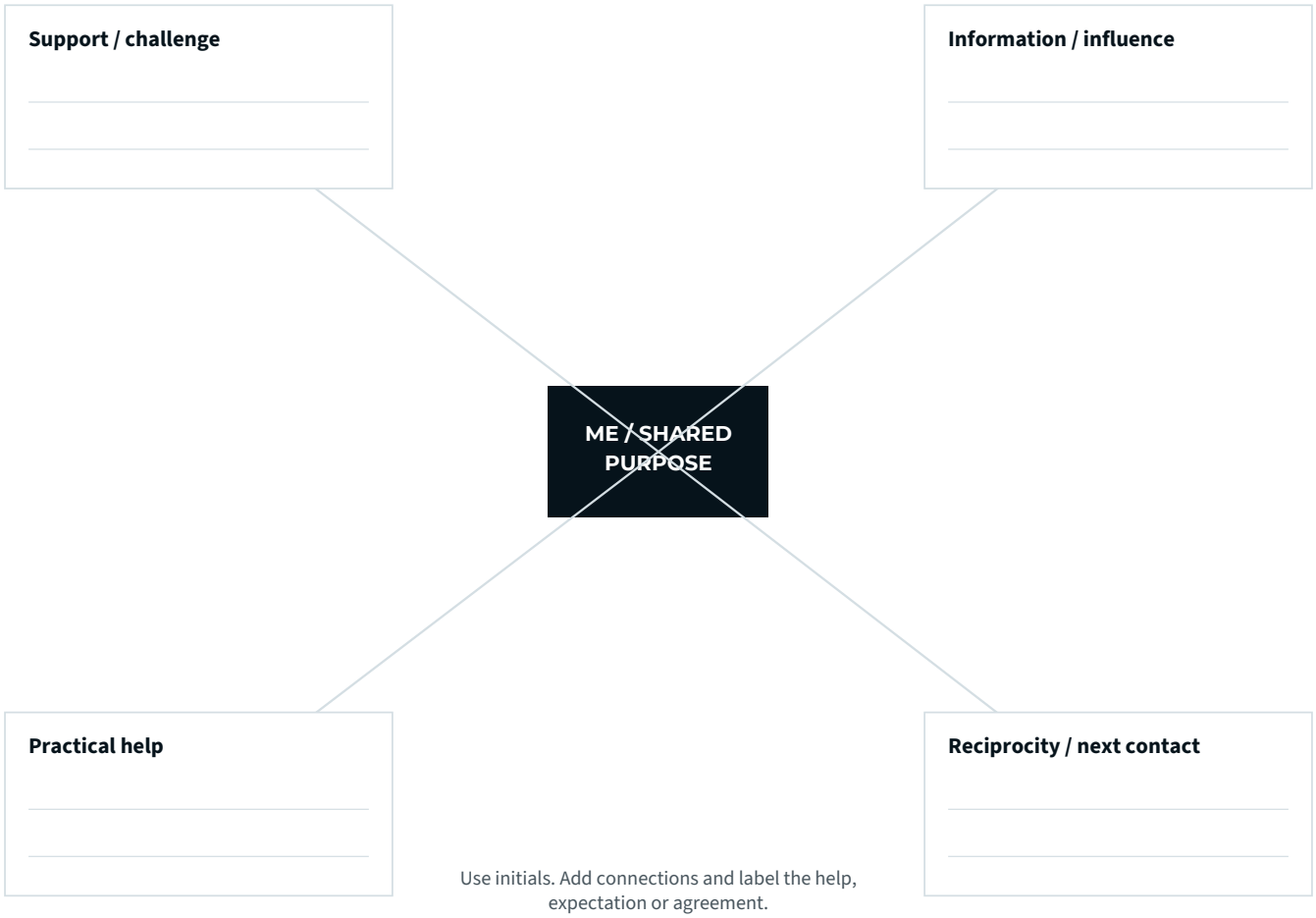
Map a future career landscape

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: _____



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: _____

Jan	**Feb**	**Mar**	**Apr**
May	**Jun**	**Jul**	**Aug**
Sep	**Oct**	**Nov**	**Dec**

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: _____

Jan	**Feb**	**Mar**	**Apr**
May	**Jun**	**Jul**	**Aug**
Sep	**Oct**	**Nov**	**Dec**

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.

Quarterly career progress board

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: _____

To explore	In progress	Evidence / complete

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.

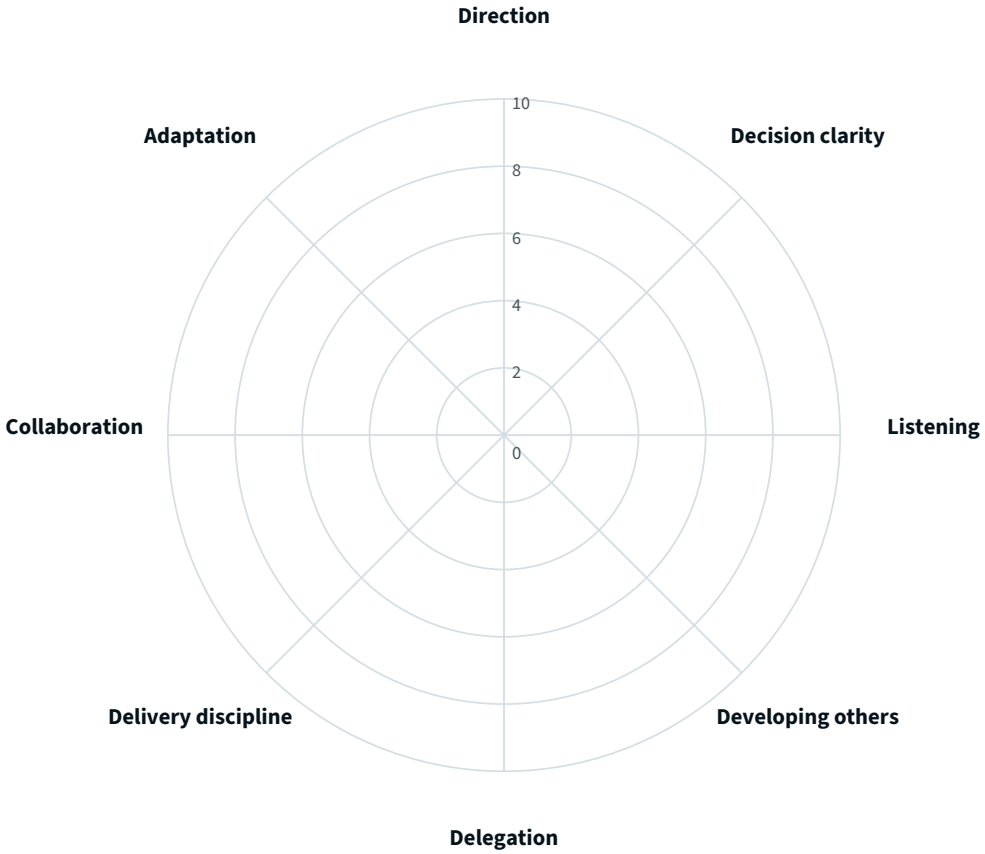
The leadership practice wheel

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

Priority / uncertainty to explore

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

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

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: 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

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

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

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

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

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

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: _____



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

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

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

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

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

Weaknesses — internal

Opportunities — external

Threats — external

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

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

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

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

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

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

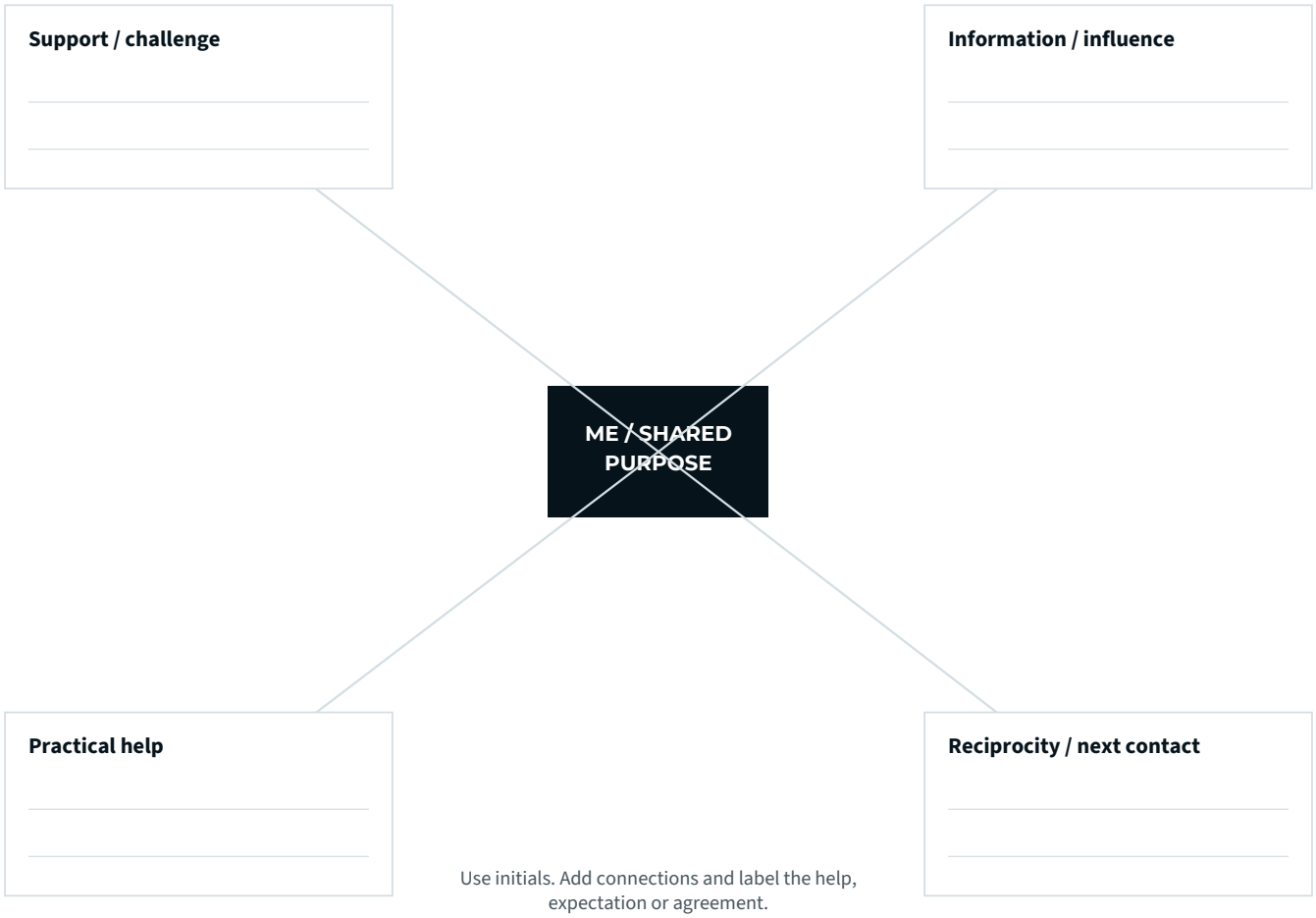
Make your contribution visible

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: _____



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

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

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

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

What others ask of me

Behaviour they may value

Observer example

Strength hypothesis

New application

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

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

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: 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

Evidence, next step and review

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

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

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

What I need to check or understand better

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

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

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

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.

Release, resolve or retain

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: _____

Release	Resolve	Retain

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

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

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

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

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

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

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

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

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

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

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

If I act: what may not happen

If I do not act: what may happen

If I do not act: what may not happen

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

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

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

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

Interpretation / assumption

Alternative view / uncertainty

Chosen response / test

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

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

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

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

Mentor perspective one

Mentor perspective two

Advice I would give a colleague

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

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

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

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

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

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

Control, influence and concern

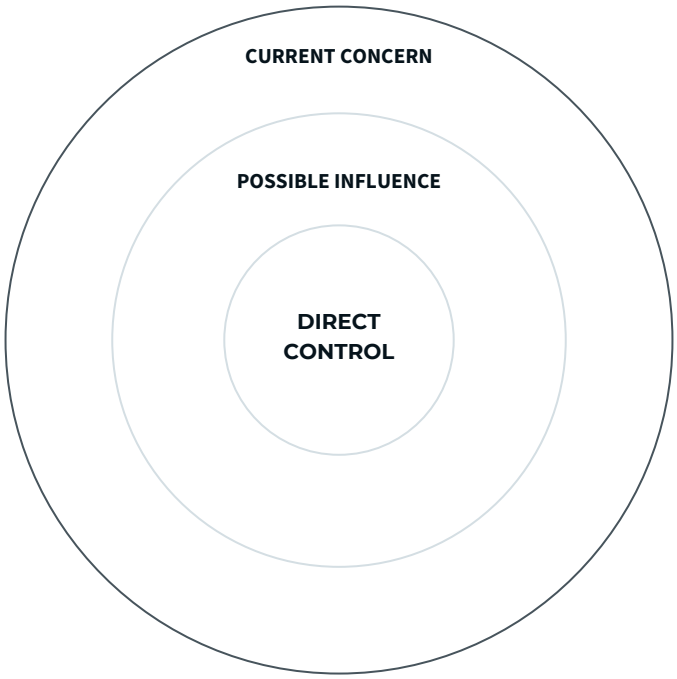
ASSESS / ACTIVATE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

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

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: 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

Action to test

Evidence to observe

Review / adapt / stop

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

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

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

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	Change / simplify	Stop / resolve

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

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

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

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

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

What I notice

Fact or assumption

New option

Information needed

Chosen next step

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

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

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

F

Action, habits and momentum

ACTIVATE / APPLY

Make progress small enough to start and meaningful enough to continue.

11 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.

Generate actions before choosing

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

PURPOSE AND INTRODUCTION

This action-brainstorming exercise separates generating possibilities from selecting a commitment. It is useful when a client sees only one difficult route or keeps discussing a problem without identifying a practical move. The final choice should be relevant, safe and owned by the client.

FACILITATION SEQUENCE

1. Define the desired change and the situation in which it matters.
2. Generate possible actions under start, stop, continue and change, without judging the first ideas.
3. Add options involving support, information or system changes rather than only personal effort.
4. Select one action for likely usefulness, feasibility and learning value.
5. Specify the first step, support and review evidence.

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 authority, stakeholder impact and workload before committing.

Generate actions before choosing

ACTIVATE / APPLY • 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: _____

Start

Stop

Continue

Change

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

Generate actions before choosing

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

INTERPRET THE RESULT CAREFULLY

Brainstorming produces options, not obligations.

An action can be a conversation, observation or request, not only a task.

Choose fewer actions than the client could theoretically complete.

DEBRIEF QUESTIONS

01 Which option changes the situation rather than only your effort?

02 What could you ask for instead of doing alone?

03 Which small action would teach you most?

04 What will you deliberately not attempt yet?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager generates ways to improve meeting decisions. She selects a simple decision log and stops reopening agreed points without new evidence.

A NEXT-STEP EXPERIMENT

Try one action in two relevant situations and review its usefulness before adding another.

My conclusion from this activity

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

Research basis: R19 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: W09, E29, FE03, FW01, IG08

The action and learning record

ACTIVATE / APPLY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This record connects commitments with evidence and learning. It avoids reducing coaching follow-through to a ticked to-do list. A missed action should be reviewed for relevance, feasibility and barriers; a completed action should be reviewed for what it changed.

FACILITATION SEQUENCE

1. Write one action in observable terms and connect it to the coaching outcome.
2. Specify the cue, date, support and evidence that will show the attempt occurred.
3. Record what actually happened, including partial attempts or changes to the plan.
4. Compare intention with outcome and identify what was learned.
5. Decide to repeat, adapt, stop or seek support, and record the next 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

The record belongs within the agreed coaching confidentiality boundary.

The action and learning record

ACTIVATE / APPLY • ABOUT 20 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: _____

Date / situation	What happened	Evidence / learning

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

The action and learning record

ACTIVATE / APPLY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Completion is not the same as effectiveness.

Do not label a missed action as lack of commitment without understanding the barrier.

A decision to stop an unhelpful action can be a successful learning outcome.

DEBRIEF QUESTIONS

01 What did you learn that the original plan did not anticipate?

02 Did completing the action produce the intended benefit?

03 What explains any gap between plan and attempt?

04 What should change in the next version?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader completes a new check-in routine but finds it duplicates an existing meeting. She adapts the existing meeting rather than adding more process.

A NEXT-STEP EXPERIMENT

Use one record for the next experiment and bring evidence, not only a completion status, to the review.

My conclusion from this activity

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

Research basis: R04 R03 • Conceptual support; this original activity is not independently validated.

Inventory references: W10, E05, Q21, FA01, SP03, SP11

Design a small daily habit

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

PURPOSE AND INTRODUCTION

This exercise creates a repeatable behaviour linked to a stable cue. It is useful when a client wants a change to become easier to initiate. The initial behaviour should be small enough to perform under ordinary conditions, with a recovery plan for missed opportunities. There is no fixed-day promise of habit formation.

FACILITATION SEQUENCE

1. Choose one behaviour that supports a meaningful goal and make it small and observable.
2. Attach it to a stable cue in an existing routine.
3. Reduce friction by preparing the environment or materials.
4. Track opportunities and attempts for fourteen days without treating a missed day as failure.
5. Review what helps repetition and adjust the cue or behaviour before expanding.

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 apply habit coaching to medication, substance use or clinical conditions without appropriate professional involvement.

Design a small daily habit

ACTIVATE / APPLY • 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: _____

When / where the cue occurs	Small observable behaviour

FOURTEEN OPPORTUNITIES — MARK ATTEMPTED, MISSED OR NOT AVAILABLE

1	2	3	4	5	6	7
8	**9**	**10**	**11**	**12**	**13**	**14**

A missed opportunity is information. Adjust the design before increasing the demand.

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

Design a small daily habit

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

INTERPRET THE RESULT CAREFULLY

Repetition in context matters more than a dramatic initial effort.

Do not use a streak as a measure of personal worth.

An unsuitable cue or unrealistic behaviour should be redesigned rather than defended.

DEBRIEF QUESTIONS

01 What will reliably remind you to act?

02 What is the smallest useful version?

03 What makes the behaviour difficult on an ordinary busy day?

04 How will you resume after a missed opportunity?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

After closing the final meeting of the day, a manager writes tomorrow's most important decision on a card. The minimum version is one sentence, not a full planning session.

A NEXT-STEP EXPERIMENT

Track fourteen opportunities, recording attempts and the main barrier when an opportunity is missed.

My conclusion from this activity

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

Research basis: R06 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: L01, S02, E38, Q14, R04

Break the large task into workable pieces

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

PURPOSE AND INTRODUCTION

A large task often feels impossible because it contains several different decisions and actions. This decomposition exercise creates a visible sequence of manageable pieces. It uses a work-breakdown approach rather than reproducing the inventoried animal metaphor.

FACILITATION SEQUENCE

1. Name the deliverable and define what “done” would mean.
2. Divide it into four to seven meaningful components.
3. For each component, identify the next observable action, dependency and decision owner.
4. Sequence the first few actions and identify what can proceed in parallel.
5. Choose a short starting block and a review point before planning every detail.

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 complex delivery, align with the organisation’s project and risk-management processes.

Break the large task into workable pieces

ACTIVATE / APPLY • 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: _____

Whole task	→	First part	→	Next action	→	Completion check

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

Break the large task into workable pieces

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

INTERPRET THE RESULT CAREFULLY

Breaking down work does not create extra capacity; check total demand.

A component may need a decision before it needs effort.

Avoid planning at a level of detail that becomes another form of avoidance.

DEBRIEF QUESTIONS

01 Which part is unclear rather than large?

02 What must happen before something else can start?

03 What can be delegated or supported?

04 What is the smallest piece that creates useful progress?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive facing a board paper separates the decision question, evidence collection, options, recommendation and review. The first action is to agree the decision question with the sponsor.

A NEXT-STEP EXPERIMENT

Complete the first work block and update the breakdown using what you learned.

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: L02

Understand and interrupt procrastination

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

PURPOSE AND INTRODUCTION

This exercise treats delay as a behaviour to understand rather than a character flaw. It examines task clarity, value, discomfort, skill, capacity and environment. The goal is to decide whether the task should be done, changed, delegated or stopped, then make a realistic start.

FACILITATION SEQUENCE

1. Choose one delayed task and confirm that it is still necessary and yours to do.
2. Describe when delay occurs and what you do instead.
3. Explore possible causes: unclear next step, low value, fear of evaluation, missing skill, overload or competing priorities.
4. Change one relevant condition and define a ten-minute starting action.
5. Attempt the start and review what the experience reveals about the barrier.

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 shame, punishment or labels such as lazy to drive action.

Understand and interrupt procrastination

ACTIVATE / APPLY • 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: _____

What I intended

What got in the way

What I can change or request

The revised experiment

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

Understand and interrupt procrastination

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

INTERPRET THE RESULT CAREFULLY

Delay can be a rational response to conflicting demands.

A small start is a test, not a cure for every form of procrastination.

Repeated difficulty may require support beyond a productivity technique.

DEBRIEF QUESTIONS

01 Is this a task problem, a capacity problem or an emotional barrier?

02 What are you protecting by delaying?

03 What would make starting easier without pretending the task is enjoyable?

04 Should the task be changed or stopped?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager delays a difficult feedback conversation because the examples are vague. She spends ten minutes organising evidence and seeks a rehearsal, rather than simply booking a more forceful deadline.

A NEXT-STEP EXPERIMENT

Complete one short starting block and record whether clarity, confidence or capacity changed.

My conclusion from this activity

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

Research basis: R18 R04 R15 • Conceptual support; this original activity is not independently validated.

Inventory references: L05, S06

Take stock and choose a response

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

PURPOSE AND INTRODUCTION

This fast review helps a client distinguish what is working, what is frustrating and what they want to change now. It is useful between deeper coaching exercises or when the agenda feels diffuse. The output is a small set of insights connected to practical responses.

FACILITATION SEQUENCE

1. Write what is working and what is creating friction in the current situation.
2. Identify what you want more of, less of or differently.
3. Extract up to three useful observations, keeping facts and interpretations distinct.
4. Choose one response for each observation: preserve, change, investigate or ask for help.
5. Select the first response and define a review point.

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

Escalate material system or safety issues through appropriate channels rather than containing them within private coaching.

Take stock and choose a response

ACTIVATE / APPLY • 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: _____

Working: retain

Not working: change

Missing: create

Unnecessary: stop

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

Take stock and choose a response

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

INTERPRET THE RESULT CAREFULLY

Not every frustration needs immediate correction.

A useful stocktake includes strengths and resources, not only problems.

Limit actions so that the review produces focus rather than another long list.

DEBRIEF QUESTIONS

01 What should be preserved while you change other things?

02 What is a symptom rather than a cause?

03 Which observation is most actionable?

04 What needs investigation before action?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader sees that team commitment is strong but priorities change too often. She preserves the team's initiative while introducing a clearer weekly priority decision.

A NEXT-STEP EXPERIMENT

Take the first response and review whether it addresses the issue you intended.

My conclusion from this activity

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

Research basis: R19 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: L06, S07, R09

A small move out of stuckness

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

PURPOSE AND INTRODUCTION

When a client cannot see a complete route, a small information-rich move may be more useful than another attempt to solve everything mentally. This exercise identifies available resources, exceptions and reversible actions. It does not require optimism or certainty before progress begins.

FACILITATION SEQUENCE

1. Describe the stuck point as a specific situation rather than a global identity.
2. Identify what is already possible, what has helped before and who could contribute.
3. Generate several small moves, including observation, clarification, conversation and practical action.
4. Choose the move with manageable risk and useful learning value.
5. Define what you will notice and how you will decide the following 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

Do not imply that all situations can be solved through individual initiative.

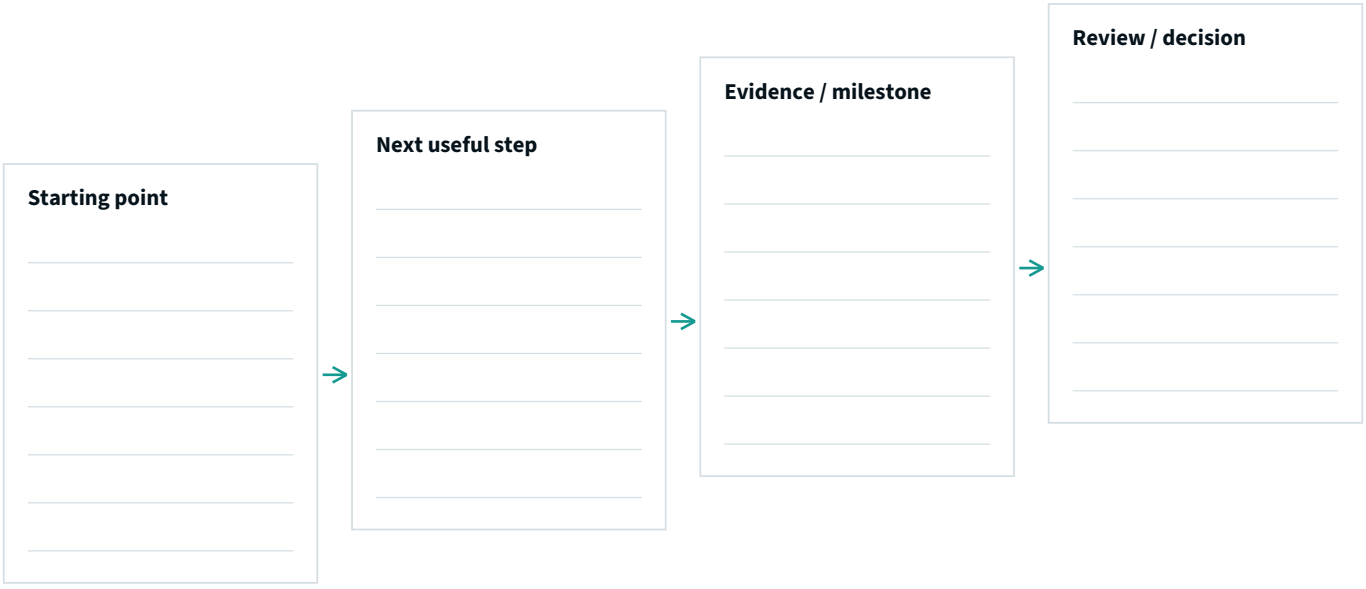
A small move out of stuckness

ACTIVATE / APPLY • 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: _____



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

A small move out of stuckness

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

INTERPRET THE RESULT CAREFULLY

The purpose is movement with learning, not forced positivity.

A small move should not bypass an important safety or governance decision.

If no safe move is available, seeking support can be the next step.

DEBRIEF QUESTIONS

01 What is not completely stuck?

02 When has the situation been slightly easier?

03 What could you learn before solving the whole problem?

04 Which move is small enough to take now?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director cannot resolve a cross-functional dispute alone. She arranges a short conversation to agree the decision that actually needs to be made, creating a starting point for further work.

A NEXT-STEP EXPERIMENT

Take the selected move within a week and record what changed in your understanding.

My conclusion from this activity

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

Research basis: R19 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: L07

Language that supports chosen action

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

PURPOSE AND INTRODUCTION

The words a client uses about a task can reveal pressure, choice, uncertainty or resentment. This exercise experiments with more accurate and agency-supportive language. It is not based on a claim that particular words reprogramme the mind, and it does not replace action on real constraints.

FACILITATION SEQUENCE

1. Write a sentence you commonly use about a difficult task.
2. Notice what the wording implies about choice, obligation and capability.
3. Create two alternative sentences that remain truthful rather than artificially positive.
4. Read each and identify which supports a useful next action.
5. Test the preferred wording alongside a practical change to the task or 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

Do not claim neurological or therapeutic effects from word substitution.

Language that supports chosen action

ACTIVATE / APPLY • 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: _____

Situation / observable evidence

Interpretation / assumption

Alternative view / uncertainty

Chosen response / test

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

Language that supports chosen action

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

INTERPRET THE RESULT CAREFULLY

Language can support reflection but cannot remove an external constraint.

Avoid replacing a legitimate “cannot” with an unrealistic affirmation.

The test is whether the wording supports clearer choice and behaviour.

DEBRIEF QUESTIONS

01 Which part of the sentence removes choice that you actually have?

02 What obligation is real and should remain visible?

03 What wording feels accurate rather than motivational theatre?

04 What action changes alongside the words?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

“I have to fix everyone’s problems” becomes “I am responsible for helping the team resolve issues, not for personally solving each one.” The leader pairs the sentence with a delegation question.

A NEXT-STEP EXPERIMENT

Use the new sentence before three relevant tasks and note whether it changes the action you take.

My conclusion from this activity

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

Research basis: R05 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: T04

Build the next part of the bridge

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

PURPOSE AND INTRODUCTION

This original bridge metaphor helps a client act when the whole route is not yet visible. One bank represents the current situation and the other a desired direction. The bridge is built from immediate actions, support and learning, not from certainty about every future step.

FACILITATION SEQUENCE

1. Describe the current bank and the desired direction on the opposite bank.
2. Name the main gap and the constraints that cannot be wished away.
3. Place the first three possible steps between the banks, including an information-gathering step where needed.
4. Add supports beneath the steps: people, authority, resources and safeguards.
5. Choose the first step and decide what must be learned before placing the next one.

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 high-risk decisions, obtain appropriate expertise before acting.

Build the next part of the bridge

ACTIVATE / APPLY • 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: _____

Current position

Step 1

Step 2

Step 3

Desired position

Supports, risks and missing pieces

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

Build the next part of the bridge

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

INTERPRET THE RESULT CAREFULLY

The metaphor does not mean any action is better than no action.

A step should create useful progress or information.

Do not draw a complete bridge merely to make uncertainty disappear visually.

DEBRIEF QUESTIONS

01 What must be known before the next step is safe?

02 What support is missing beneath the plan?

03 Which step is reversible?

04 What would tell you to change the direction?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader exploring a new operating model first clarifies the problem, then interviews two stakeholders, then tests one decision-right change before proposing a full redesign.

A NEXT-STEP EXPERIMENT

Complete the first step and redraw the next two in light of what you learn.

My conclusion from this activity

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

Research basis: R19 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: M03

Resolve the tolerations that consume attention

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

PURPOSE AND INTRODUCTION

Tolerations are recurring small irritations, unfinished decisions or avoidable frictions that consume attention. This exercise distinguishes low-cost fixes from deeper issues requiring negotiation or system change. It avoids assuming that every frustration should be eliminated or that the client controls all causes.

FACILITATION SEQUENCE

1. List recurring irritations and unfinished matters in work and daily life.
2. Group them into practical fixes, decisions, conversations and structural issues.
3. Estimate the attention cost and effort required without false numerical precision.
4. Choose one low-risk fix and one issue that needs a request or decision.
5. Record what changes after action and whether another underlying issue becomes visible.

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 frame other people themselves as tolerations; describe behaviours, arrangements or conditions.

Resolve the tolerations that consume attention

ACTIVATE / APPLY • 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: _____

Keep / continue	Change / simplify	Stop / resolve

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

Resolve the tolerations that consume attention

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

INTERPRET THE RESULT CAREFULLY

A toleration list is not a mandate to optimise every detail of life.

Some irritations signal a role or process problem that deserves wider attention.

Choose a few meaningful items rather than creating a second source of overwhelm.

DEBRIEF QUESTIONS

01 Which issue returns because nobody has made a decision?

02 What are you tolerating for a legitimate reason?

03 What small fix would release useful attention?

04 Which issue is too structural for a private workaround?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director repeatedly searches for inconsistent project updates. Instead of tidying her own inbox indefinitely, she agrees a common update location and ownership rule with the team.

A NEXT-STEP EXPERIMENT

Resolve one practical item and make one structural request, then review the attention saved.

My conclusion from this activity

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

Research basis: R14 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: E37, Q30, FE05, FE11

From excuse language to a barrier plan

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

PURPOSE AND INTRODUCTION

This exercise supports accountability without shame. It examines the explanation for an uncompleted commitment and distinguishes a genuine constraint, an outdated goal, an avoidable pattern and a need for support. The aim is a more realistic next agreement, not a confrontation about character.

FACILITATION SEQUENCE

1. Choose one commitment that was not completed and describe what actually happened.
2. Write the explanation without judging it, then identify evidence for each part.
3. Separate factors within your control from conditions requiring help or renegotiation.
4. Decide whether to retain, change or stop the commitment.
5. Make a new agreement that addresses the main barrier and includes a review point.

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 accusatory labels and do not dismiss disability, care responsibilities or structural constraints as excuses.

From excuse language to a barrier plan

ACTIVATE / APPLY • 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: _____

What I intended

What got in the way

What I can change or request

The revised experiment

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

From excuse language to a barrier plan

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

INTERPRET THE RESULT CAREFULLY

Accountability requires accurate explanation, not forced self-blame.

A changed goal may be appropriate; record the reason rather than quietly abandoning it.

Repeated barriers should change the design of the plan.

DEBRIEF QUESTIONS

01 What part of the explanation is a fact?

02 What part is a pattern you could change?

03 Does the commitment still matter?

04 What would make the next agreement more honest?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager misses three development actions because urgent work repeatedly displaces them. He negotiates protected practice time and reduces the action to one relevant work behaviour.

A NEXT-STEP EXPERIMENT

Test the revised agreement once and review the barrier explicitly, whether or not the action succeeds.

My conclusion from this activity

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

Research basis: R18 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: E41

G

Time, priorities and delegation

APPLY

Allocate attention deliberately and change the systems that consume it.

10 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.

Find the priority that deserves today

APPLY • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A short prioritisation conversation is useful when an executive is carrying too many competing concerns. The exercise distinguishes what feels loud from what matters, and chooses a proportionate next move. Use it at the start of a session or when the client needs to regain direction between meetings.

FACILITATION SEQUENCE

1. Spend one minute listing the five concerns most present in your attention.
2. For each concern, write the consequence of doing nothing for one week.
3. Mark the concern most connected to an agreed responsibility or personally chosen value.
4. Choose one action that fits the time and authority available today.
5. Name what will deliberately wait, and tell anyone affected by that choice.

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 apply a five-minute shortcut to safety-critical, legal or otherwise consequential decisions requiring fuller analysis.

Find the priority that deserves today

APPLY • ABOUT 10 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: _____

Start broadly

Choose what matters

Make the trade-off explicit

Retain the priority

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

Find the priority that deserves today

APPLY • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

One priority does not remove the others; it makes the immediate allocation of attention explicit.

Urgency requires a real deadline or consequence, not merely a strong feeling.

Revisit the decision when new information materially changes the consequences.

DEBRIEF QUESTIONS

01 Which concern is loud rather than important?

02 What consequence makes this a priority?

03 What would happen if you did less elsewhere?

04 Who needs to understand the trade-off?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A chief people officer chooses to clarify a sensitive decision before polishing a presentation, because the unresolved decision is delaying five colleagues.

A NEXT-STEP EXPERIMENT

Protect a short period for the chosen action today and record what changed.

My conclusion from this activity

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

Research basis: R03 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: W08, E45, SP07

Design a week that can actually work

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

Weekly planning connects intended results with real capacity. Rather than producing an idealised list, the client makes time for commitments, focused work, necessary coordination and recovery. The output is a realistic weekly experiment that can be reviewed against what happened.

FACILITATION SEQUENCE

1. List the fixed commitments and realistic working capacity for the coming week.
2. Choose no more than three meaningful outcomes and define what finished would look like.
3. Place the most attention-demanding work in suitable periods, allowing for travel, handovers and interruptions.
4. Reserve a realistic contingency margin based on recent experience rather than filling every space.
5. Agree a brief end-of-week review of outcomes, workload and one planning improvement.

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

Build around the client's actual work arrangements, accessibility needs and care responsibilities.

Design a week that can actually work

APPLY • 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: _____

Mon	Tue	Wed	Thu	Fri	Sat	Sun

Protect capacity, dependencies, preparation and recovery. Adapt to your working week.

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

Design a week that can actually work

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A full calendar is not evidence of a useful week.

An unfinished outcome may reflect unrealistic allocation or dependency, not insufficient commitment.

Compare planned and actual capacity before adding more priorities.

DEBRIEF QUESTIONS

01 What are you assuming about your capacity?

02 Which outcome would make the week worthwhile?

03 Where could a handover reduce overload?

04 What pattern from last week should change this plan?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A regional director reduces five planned initiatives to two deliverables and a key relationship conversation after allowing for site travel and an unpredictable operational issue.

A NEXT-STEP EXPERIMENT

Test the plan for one week; record the largest difference between planned and actual work.

My conclusion from this activity

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

Research basis: R03 R04 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: L08

Choose actions by impact and effort

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This matrix helps a client compare possible actions before investing time. It is a decision aid, not a mathematically precise ranking. Impact must be defined in relation to a chosen outcome, while effort should include coordination, emotional demand and opportunity cost as well as hours.

FACILITATION SEQUENCE

1. Define the outcome and the period over which impact will be judged.
2. List six to ten possible actions and estimate relative impact and effort on a 0–10 scale.
3. Plot each action, writing a short evidence note for uncertain estimates.
4. Compare high-impact feasible actions with demanding actions that need resources or sequencing.
5. Select one action, state the trade-off and name the information that could change the choice.

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 impact/effort to bypass non-negotiable duties or treat people's wellbeing as a discretionary benefit.

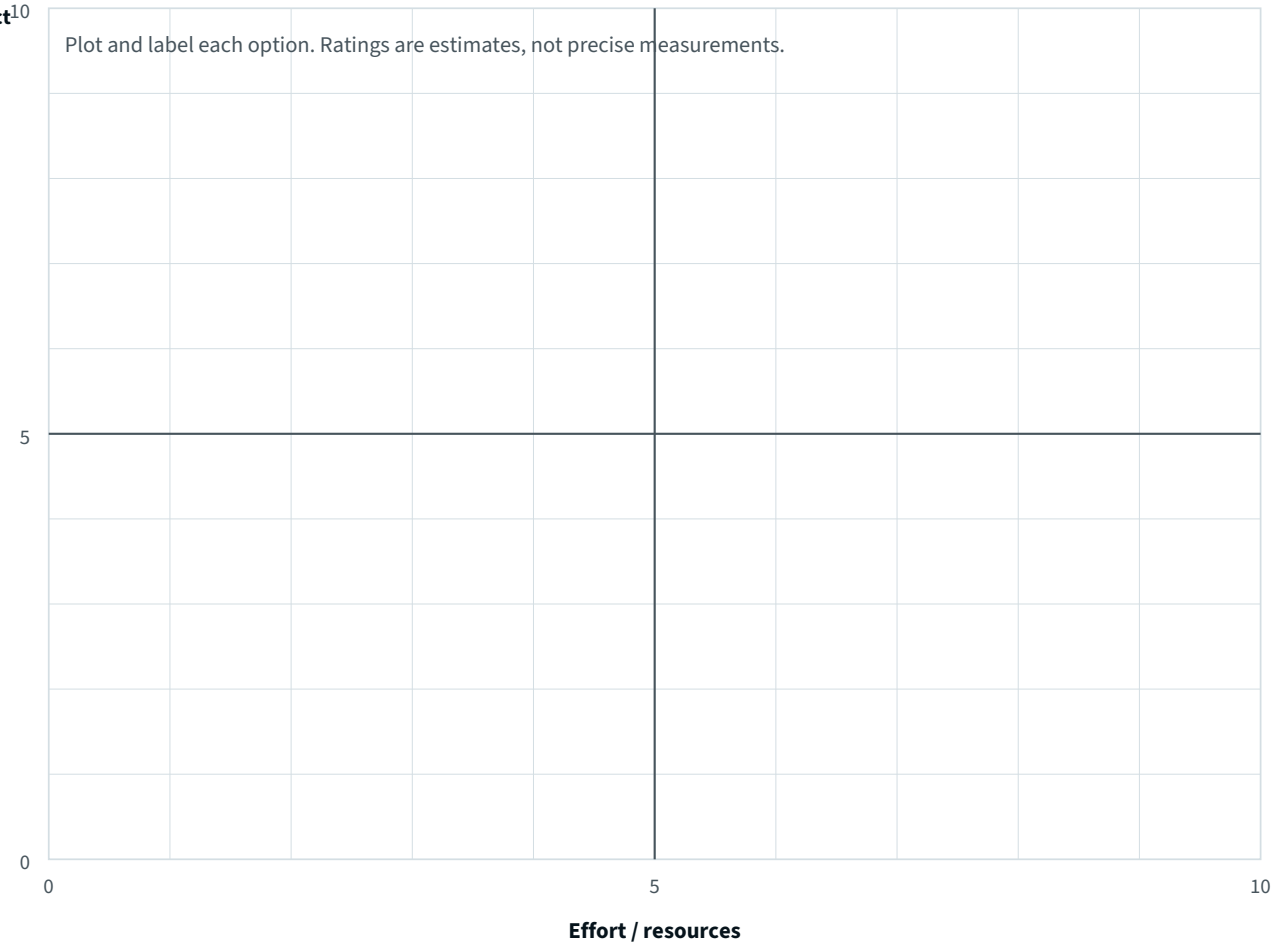
Choose actions by impact and effort

APPLY • 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: _____



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

Choose actions by impact and effort

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The coordinates are estimates, not measurement precision.

A low-effort action is not automatically worthwhile if it does not serve the chosen outcome.

Safety, fairness and mandatory obligations can override the matrix.

DEBRIEF QUESTIONS

01 What does impact mean in this decision?

02 Which estimate rests on the weakest evidence?

03 What apparently easy action has a hidden cost?

04 Which option could be redesigned rather than rejected?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A service director prioritises clarifying an approval rule over buying a new reporting tool because the rule change is more likely to remove the observed delay.

A NEXT-STEP EXPERIMENT

Take one selected action and compare its actual effort and contribution with your estimates.

My conclusion from this activity

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

Research basis: R03 R19 • Conceptual support; this original activity is not independently validated.

Inventory references: T01, E35, Q02

Put the important work into the calendar

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

The familiar big-rocks metaphor becomes useful only when translated into actual capacity decisions. Here the client identifies a few important commitments, allocates them first and explicitly negotiates the smaller work around them. The exercise reveals workload conflicts rather than pretending that everything can fit.

FACILITATION SEQUENCE

1. Choose three important commitments for the next fortnight and define the time and conditions each needs.
2. Record fixed obligations, travel and necessary recovery before allocating discretionary time.
3. Place the important commitments into the calendar with preparation and follow-through included.
4. Fit smaller tasks around these blocks, batching only where appropriate.
5. Where the plan does not fit, remove, delegate or renegotiate work and record the conversation required.

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

Include rest and essential personal commitments without requiring the client to disclose private details.

Put the important work into the calendar

APPLY • 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: _____

Mon	Tue	Wed	Thu	Fri	Sat	Sun

Protect capacity, dependencies, preparation and recovery. Adapt to your working week.

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

Put the important work into the calendar

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The exercise exposes capacity limits; it does not create extra hours.

Calendar protection depends on authority, relationships and workload agreements.

Repeated displacement is information about the system, not merely a failure of discipline.

DEBRIEF QUESTIONS

01 What important work currently receives only leftover time?

02 What is the true duration including preparation?

03 Which commitment cannot fit without a trade-off?

04 How will you protect this allocation respectfully?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A finance leader schedules two decision-preparation blocks and agrees a deputy for routine requests rather than relying on late evenings before the board meeting.

A NEXT-STEP EXPERIMENT

Protect one important block this week and log what enabled or displaced it.

My conclusion from this activity

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

Research basis: R04 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: T02, E34, Q03

See where attention really goes

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A short time-and-attention audit replaces vague impressions with a sample of actual work. It distinguishes necessary activity, avoidable friction and work that is valuable but poorly timed. The client owns the record; this is not an employee-surveillance instrument.

FACILITATION SEQUENCE

1. Choose two representative working days and record activities in manageable blocks rather than every minute.
2. For each block, note duration, purpose, interruptions and your own attention quality.
3. Classify the activity as useful delivery, necessary coordination, avoidable friction or recovery; revise categories to fit the role.
4. Compare the observed allocation with the responsibilities that matter most.
5. Choose one process change and one personal adjustment, then repeat a small sample.

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 names and confidential case details out of the log; do not use it as covert performance monitoring.

See where attention really goes

APPLY • 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: _____

Date / situation	What happened	Evidence / learning

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

See where attention really goes

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Two days are a sample, not a definitive account of the job.

Low attention may reflect task conditions, fatigue or timing; do not infer a personal deficit.

Avoid converting every human interaction into a productivity cost.

DEBRIEF QUESTIONS

01 What surprised you about the observed pattern?

02 Which apparent waste was actually necessary coordination?

03 Where does the system repeatedly create rework?

04 What small change would free the most useful attention?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An operations executive discovers that repeated clarification of incomplete requests takes more time than planned meetings. She changes the request template and ownership rule.

A NEXT-STEP EXPERIMENT

Sample the same type of day after the change and compare the pattern, not just the total hours.

My conclusion from this activity

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

Research basis: R14 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: T03, E33, Q16

Reduce interruptions without becoming unavailable

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This exercise distinguishes interruptions that protect the organisation from those created by unclear access rules or preventable dependency. The executive designs a more deliberate availability system while keeping genuine urgent routes open.

FACILITATION SEQUENCE

1. Log recent interruptions, their source, purpose, timing and consequence.
2. Separate time-critical escalation from clarification, reassurance and routine approval.
3. Identify the underlying cause of the most repeated interruption type.
4. Design an access agreement: focus periods, check-in windows, delegated decisions and a genuine emergency route.
5. Test the agreement with affected colleagues and review whether responsiveness and focused work both improve.

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 block essential safeguarding, safety or urgent operational communication.

Reduce interruptions without becoming unavailable

APPLY • 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: _____

Input / request	→	Owner / decision	→	Handover	→	Check / response

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

Reduce interruptions without becoming unavailable

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The aim is reliable availability, not maximal isolation.

A reduction in messages can hide unmet needs; ask colleagues about the effect.

Repeated reassurance requests may indicate unclear authority or fear of mistakes.

DEBRIEF QUESTIONS

01 Which interruptions prevent harm or delay?

02 What do colleagues need that your current system does not provide?

03 Where have you become an unnecessary decision bottleneck?

04 How will you know the new boundary is fair?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A department head replaces constant approval messages with a daily decision clinic and a clear delegated-spend rule, while retaining an immediate route for safety issues.

A NEXT-STEP EXPERIMENT

Trial the agreement for five working days and gather one colleague's experience of the change.

My conclusion from this activity

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

Research basis: R14 R12 • Conceptual support; this original activity is not independently validated.

Inventory references: T05, E36, Q18

One weekly plan, one daily next step

APPLY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This task planner connects a short weekly outcome list with daily execution. It is deliberately smaller than a complete project-management system. It helps a client see the next useful action, dependencies and the point at which unfinished work must be reconsidered.

FACILITATION SEQUENCE

1. Write the week's intended outcomes and the fixed deadlines that genuinely matter.
2. Break each outcome into visible next actions, each beginning with a verb.
3. Identify actions waiting for another person or a decision and assign a follow-up date.
4. Select a feasible daily set, leaving capacity for known variability.
5. At day end, mark completed, renegotiated or carried forward with a reason; do not automatically roll everything over.

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 an approved secure system for business-sensitive tasks rather than recording confidential information on shared sheets.

One weekly plan, one daily next step

APPLY • 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: _____

Mon	Tue	Wed	Thu	Fri	Sat	Sun

Protect capacity, dependencies, preparation and recovery. Adapt to your working week.

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

One weekly plan, one daily next step

APPLY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Completion counts are less important than contribution to the intended outcome.

A waiting item needs a follow-up agreement, not repeated mental checking.

Persistent carry-forward is a signal to change priority, design or ownership.

DEBRIEF QUESTIONS

01 Which entry is still a project rather than an action?

02 What are you waiting for and who knows?

03 Which unfinished item should be renegotiated rather than copied forward?

04 What would make tomorrow's list more credible?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director turns "improve succession planning" into three next actions: agree critical roles, confirm evidence sources and schedule the first calibration meeting.

A NEXT-STEP EXPERIMENT

Use the planner for one working week and remove one recurring source of carry-forward.

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: T06, Q28

Choose what to stop, reduce or refuse

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A stop-doing list releases capacity only when the consequences are understood and the change is communicated. This activity helps an executive distinguish unnecessary work from work that needs a different owner or a better standard.

FACILITATION SEQUENCE

1. List recurring activities that consume time without a clear current purpose.
2. For each, identify the beneficiary, obligation and likely consequence of stopping.
3. Sort into stop, reduce, simplify, delegate or retain with a reason.
4. Choose one change and agree it with the people who rely on the activity.
5. Set a review point and an explicit signal that would require reinstating or revising the work.

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 mandatory, contractual and safety requirements before removing work.

Choose what to stop, reduce or refuse

APPLY • 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: _____

Keep / continue	Change / simplify	Stop / resolve

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

Choose what to stop, reduce or refuse

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

An unpopular task can still be necessary.

Stopping work is a governance decision when others rely on its output.

Simplification may be safer and more useful than elimination.

DEBRIEF QUESTIONS

01 Who would notice if this activity stopped?

02 What valid need might be hidden inside an inefficient process?

03 Which standard is higher than the situation requires?

04 How will you avoid merely passing the burden to someone else?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A business-unit head replaces a weekly narrative report with a short exception update after agreeing the essential information with its recipients.

A NEXT-STEP EXPERIMENT

Stop or simplify one agreed activity for two cycles and check the consequences with its users.

My conclusion from this activity

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

Research basis: R14 R03 • Conceptual support; this original activity is not independently validated.

Inventory references: T07

Distinguish urgency from importance

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

The urgent–important matrix is used here as a conversation about consequences and timing. It helps a client protect significant work before it becomes a crisis and identify tasks whose urgency belongs elsewhere. The quadrant is a starting point for judgement, not a universal instruction.

FACILITATION SEQUENCE

1. Define importance in relation to responsibilities, values and consequences.
2. List current tasks and record the real deadline or time sensitivity for each.
3. Place each task in the four-quadrant matrix and question uncertain placements.
4. For important non-urgent work, schedule preparation before the critical date; for other work, clarify ownership or necessity.
5. Choose one change that prevents repeated urgency rather than only processing it faster.

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 dismiss a colleague's issue as unimportant without understanding its consequences.

Distinguish urgency from importance

APPLY • 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: _____

Important / not urgent

Important / urgent

Less important / not urgent

Less important / urgent

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

Distinguish urgency from importance

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Urgency and importance are context-dependent; review them when circumstances change.

Delegation is appropriate only with capability, authority and capacity.

The matrix cannot settle conflicts between two legitimate priorities without further discussion.

DEBRIEF QUESTIONS

01 Which deadline is assumed rather than agreed?

02 What important work becomes urgent because it is repeatedly postponed?

03 Whose authority is needed to change ownership?

04 What would prevent this crisis from recurring?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader schedules early stakeholder consultation for a strategic decision rather than waiting until the approval deadline makes consultation superficial.

A NEXT-STEP EXPERIMENT

Protect one important non-urgent action and review whether it reduces later pressure.

My conclusion from this activity

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

Research basis: R03 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: T08, E32, Q26

Delegate a result, not a vague task

APPLY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This delegation canvas helps an executive transfer a defined result with the authority, support and review arrangements needed for success. It distinguishes delegation from dumping unwanted work and from retaining control while pretending to hand it over.

FACILITATION SEQUENCE

1. Choose a responsibility suitable for delegation and define the required result and boundaries.
2. Discuss the recipient's capability, capacity, interest and development needs rather than assuming readiness.
3. Agree decision authority: what they may decide, what requires consultation and what must be escalated.
4. Provide resources, context and proportionate checkpoints, including what good evidence looks like.
5. Rehearse the handover, invite the recipient to explain the agreement in their own words and set a 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

Check role, legal and professional limits before delegating regulated or high-risk decisions.

Delegate a result, not a vague task

APPLY • 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: _____

Result and quality boundary

Decision authority

Support and capacity

Checkpoints and escalation

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

Delegate a result, not a vague task

APPLY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The delegating leader retains relevant accountability while transferring agreed work and authority.

A capable person may still lack capacity or organisational access.

Checkpoints should match risk, not the leader's discomfort with letting go.

DEBRIEF QUESTIONS

01 What result are you genuinely willing to let someone else own?

02 Where might your behaviour undermine the handover?

03 What support would make the delegation developmental?

04 How will you respond to a different but acceptable approach?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director delegates a supplier review, agreeing selection criteria and escalation limits while allowing the manager to design the process and present the recommendation.

A NEXT-STEP EXPERIMENT

Complete one explicit handover and ask the recipient what remained unclear after the first week.

My conclusion from this activity

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

Research basis: R05 R12 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: E20, Q15

H

Energy, balance and relationships

ASSESS / APPLY

Improve sustainable performance without making the individual responsible for every system failure.

19 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.

The whole-life balance wheel

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

PURPOSE AND INTRODUCTION

The wheel opens a discussion about how life is experienced across several areas. It is not a diagnostic test and a perfectly round wheel is not the objective. The client defines the areas, their meaning and the amount of attention each deserves in this season of life.

FACILITATION SEQUENCE

1. Agree eight relevant areas; suggested starting labels are work, health routines, close relationships, community, learning, finances, recreation and home environment.
2. Define what a personally satisfactory situation would look like in each area.
3. Rate current satisfaction from 0 to 10, where 0 means not at all satisfied and 10 means fully satisfied by your own definition; use N/A where appropriate.
4. Plot the ratings and mark one or two areas you choose to discuss, considering their importance and interdependence.
5. Identify a manageable change and a review date; the client decides what remains private.

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 pressure disclosure about money, health, family or relationships; specialist advice may be more appropriate for some concerns.

The whole-life balance wheel

ASSESS / APPLY • 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: _____



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 whole-life balance wheel

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

INTERPRET THE RESULT CAREFULLY

Do not average the spokes or interpret the area of the polygon as a wellbeing score.

Ratings are personal and contextual; comparison between people is not meaningful.

A low score is an invitation to inquire, not proof of a problem the coach should solve.

DEBRIEF QUESTIONS

01 What does the shape help you notice, without judging it?

02 Which area matters most in this particular season?

03 Where could one change help more than one area?

04 What would a small worthwhile improvement look like?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An expatriate executive chooses to strengthen local friendships rather than increase work achievement, recognising that support outside work is the more meaningful current priority.

A NEXT-STEP EXPERIMENT

Take one chosen action for two weeks and revisit the same area definition before re-rating.

My conclusion from this activity

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

Research basis: R01 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: W20, B08, S09, E42, FE14, SP09, IG07

Say no while protecting the relationship

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

PURPOSE AND INTRODUCTION

Boundary-setting requires clarity about responsibilities and consequences, not simply a more assertive phrase. This activity helps a client decide when to accept, negotiate or decline a request and practise a response that is respectful, specific and credible.

FACILITATION SEQUENCE

1. Describe a real request, who is making it and the consequences of accepting or declining.
2. Clarify your responsibility, capacity and any power or cultural considerations.
3. Choose a response: accept with a clear agreement, negotiate scope or timing, or decline with a concise reason.
4. Practise the response: acknowledge the request, state the boundary, offer a feasible alternative where appropriate and confirm the next step.
5. Rehearse likely pushback and decide when to repeat the boundary, involve a manager or seek support.

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 where there is risk of retaliation or abuse; plan appropriate support.

Say no while protecting the relationship

ASSESS / APPLY • 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

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

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

Say no while protecting the relationship

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

INTERPRET THE RESULT CAREFULLY

A boundary is an agreement about behaviour or access, not a judgement of another person.

Power differences may change what is safe and feasible.

A thoughtful yes with changed scope can be a stronger boundary than an unrealistic no.

DEBRIEF QUESTIONS

01 What are you protecting with this boundary?

02 What responsibility is genuinely yours?

03 Where are you offering an alternative you cannot sustain?

04 How could the response be both clearer and more respectful?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A programme lead says, “I can complete the analysis by Thursday, or provide the headline figures tomorrow. I cannot responsibly complete the full review by tomorrow.”

A NEXT-STEP EXPERIMENT

Use one rehearsed response and reflect on the outcome and the relationship effect.

My conclusion from this activity

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

Research basis: R01 R14 R20 • Conceptual support; this original activity is not independently validated.

Inventory references: B01

Review relationship patterns without labelling people

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

PURPOSE AND INTRODUCTION

This relationship review replaces labels such as toxic with observable patterns, effects and choices. It helps the client identify nourishing relationships, difficult interactions and boundaries or support that might be needed. The focus is on the client's experience and agency, not diagnosing another person.

FACILITATION SEQUENCE

1. Choose a small set of relationships relevant to the coaching purpose, using initials if recorded.
2. Describe recent helpful and difficult interactions using observable behaviour.
3. Note the effect on energy, trust and ability to act, and acknowledge your contribution where relevant.
4. Choose whether to appreciate, clarify expectations, change a pattern, set a boundary or seek specialist support.
5. Prepare one proportionate conversation or action and consider safety and likely consequences.

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

When coercion, harassment, violence or serious abuse is disclosed, prioritise appropriate support and safeguarding rather than relationship repair exercises.

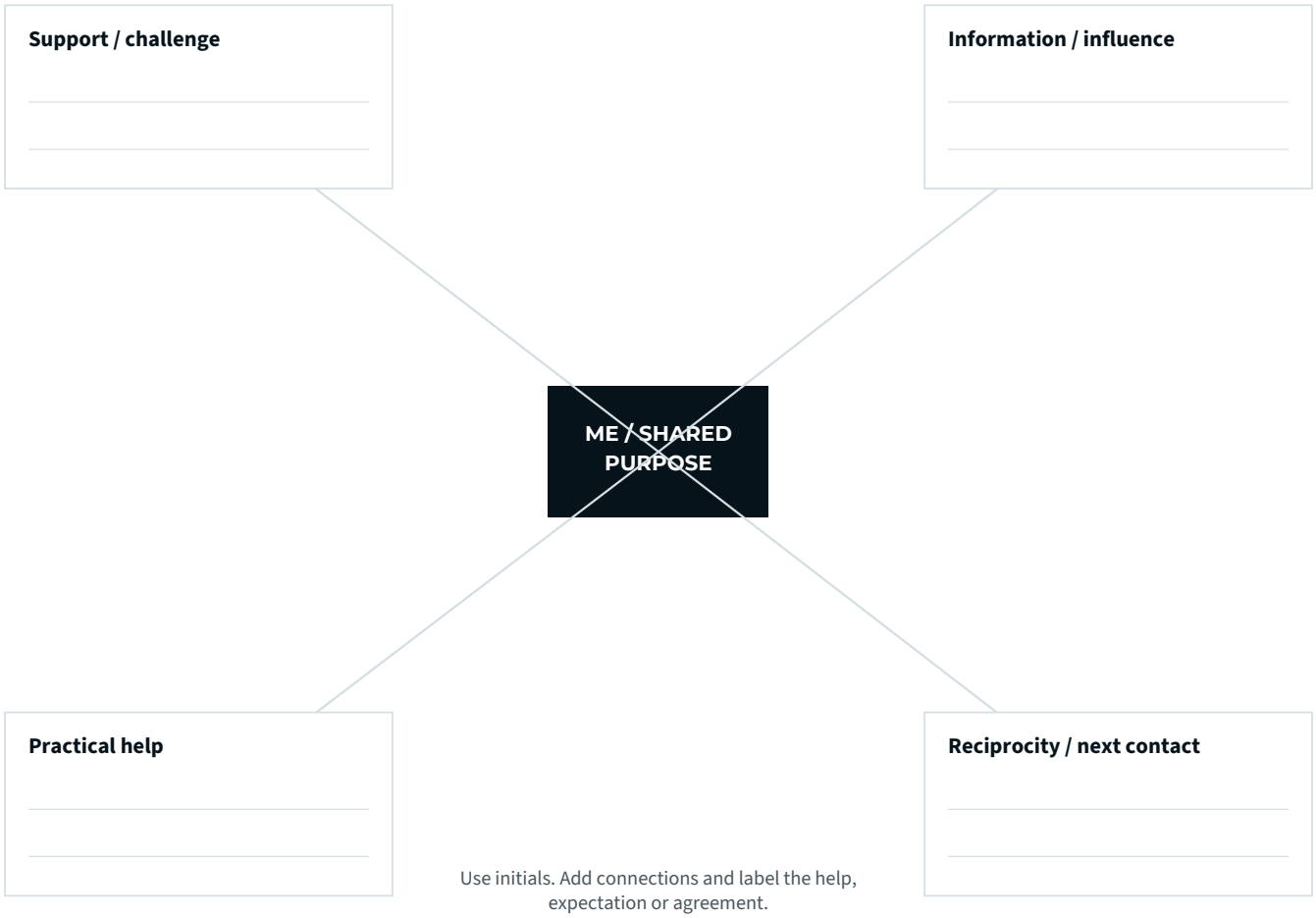
Review relationship patterns without labelling people

ASSESS / APPLY • 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: _____



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

Review relationship patterns without labelling people

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

INTERPRET THE RESULT CAREFULLY

A single difficult exchange does not define a person or relationship.

The client's account is important but does not establish the other person's motives.

Safety and dignity take priority over preserving a relationship at any cost.

DEBRIEF QUESTIONS

01 What behaviour are you reacting to rather than what label have you assigned?

02 What explanation remains uncertain?

03 Where could a clearer agreement improve the pattern?

04 Which situation requires support rather than a coaching experiment?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader identifies that late changes from a colleague are creating rework. She asks for an agreed cut-off and escalation process rather than describing the colleague as toxic.

A NEXT-STEP EXPERIMENT

Try one safe, specific change and record the behaviour observed afterwards.

My conclusion from this activity

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

Research basis: R01 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: B03, S03, R05

Identify what drains and restores energy

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

PURPOSE AND INTRODUCTION

An energy map reveals patterns across tasks, interactions and working conditions. It does not measure a medical condition. The client observes what depletes attention or enthusiasm and distinguishes changes they can make from workload or organisational issues requiring a wider response.

FACILITATION SEQUENCE

1. List recent activities and situations that left you depleted or more able to engage.
2. For each, record the context, duration and what specifically affected you.
3. Sort drains into reduce, redesign, recover after, or raise with someone who can change the conditions.
4. Identify a small source of restoration that is feasible and personally meaningful.
5. Select one drain to address and one restorative practice to test, then review the pattern.

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

Persistent or concerning fatigue, distress or physical symptoms may require healthcare or occupational-health support.

Identify what drains and restores energy

ASSESS / APPLY • 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: _____

Drains / demanding conditions

Restores / supportive conditions

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

Identify what drains and restores energy

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

INTERPRET THE RESULT CAREFULLY

Self-reported energy varies with context and is not a clinical score.

A recovery practice does not compensate indefinitely for harmful workload.

Look for repeated conditions rather than drawing conclusions from one difficult day.

DEBRIEF QUESTIONS

01 Which drain is unavoidable and which is unnecessarily repeated?

02 What part of the situation has the greatest effect?

03 What restores you without becoming another obligation?

04 Who can change the conditions you cannot change alone?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader changes a sequence of back-to-back conflict meetings, adds preparation time and asks for clearer decision ownership rather than relying only on evening relaxation.

A NEXT-STEP EXPERIMENT

Change one draining condition and note your experience over several comparable occasions.

My conclusion from this activity

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

Research basis: R10 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: B04, S04, E44, R06

Turn unmet needs into practical requests

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

PURPOSE AND INTRODUCTION

This needs review helps an executive move from a general feeling of depletion to specific conditions that would support sustainable functioning. Needs may concern recovery, autonomy, connection, clarity or practical help. The client chooses language that fits their experience rather than accepting a prescribed hierarchy.

FACILITATION SEQUENCE

1. Consider what currently supports and undermines your ability to function well.
2. Name up to five needs in plain language and describe what meeting each would look like.
3. Distinguish what you can provide yourself from what requires agreement or support.
4. Choose one need and formulate a specific, feasible request or routine.
5. Agree a review point and how you will know the change is helping.

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 health and family disclosures optional; refer beyond coaching where the need requires specialist support.

Turn unmet needs into practical requests

ASSESS / APPLY • 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: _____

Need in my words	What I can do	What I will request

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

Turn unmet needs into practical requests

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

INTERPRET THE RESULT CAREFULLY

Needs are not weaknesses or entitlements to any particular solution.

A request is more actionable when it describes the condition required.

Unmet organisational needs should not automatically become private self-care tasks.

DEBRIEF QUESTIONS

01 What do you need rather than what do you think you should need?

02 Which need has been disguised as irritation or overwork?

03 What request would another person be able to understand and act on?

04 What can be improved without waiting for everything to change?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A newly promoted manager identifies a need for role clarity and requests a fortnightly priorities conversation rather than treating uncertainty as a confidence problem.

A NEXT-STEP EXPERIMENT

Make one specific request or establish one chosen routine and review its effect after two weeks.

My conclusion from this activity

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

Research basis: R05 R10 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: B06, E43

A sustainable self-care practices review

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

PURPOSE AND INTRODUCTION

This original reflective questionnaire reviews everyday practices that may support sustainable work and life. It is a conversation aid, not a validated wellbeing, burnout or mental-health assessment. The aim is to identify one useful improvement without prescribing a single lifestyle.

FACILITATION SEQUENCE

1. Choose a recent two-week period and read the twelve items, marking N/A where a statement is not applicable.
2. Rate how often each statement described your experience: 0 never, 1 rarely, 2 sometimes, 3 often, 4 consistently.
3. Group the items under recovery, support, boundaries and practical care; calculate a domain mean only when at least two of its three items are answered.
4. Discuss the examples behind the ratings, especially differences between importance and opportunity.
5. Choose one feasible practice or organisational request and review it using the same reference 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

This questionnaire must not screen for illness or be used in employment decisions. Distress or health concerns require appropriate professional support.

A sustainable self-care practices review

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

Client code: _____ Date: _____

Over the past two weeks: 0 = never; 1 = rarely; 2 = sometimes; 3 = often; 4 = consistently. Use N/A where appropriate. Rate opportunity and experience honestly, not an ideal lifestyle.

NO.	STATEMENT / QUESTION	RATING
SC01	I had a realistic opportunity to pause after demanding work.	
SC02	I spent some time on an activity I found restorative.	
SC03	I could disengage from work for a period that suited my circumstances.	
SC04	I could ask someone for practical help when needed.	
SC05	I had a conversation in which I felt heard.	
SC06	I maintained contact with people who matter to me.	
SC07	I made my available capacity clear when taking on work.	
SC08	I protected at least one personally important commitment.	
SC09	I renegotiated an expectation that had become unrealistic.	
SC10	I made space for everyday routines that support me.	
SC11	I attended to an avoidable problem in my immediate environment.	
SC12	I arranged appropriate support for a practical need rather than indefinitely postponing it.	

Recovery	Support	Boundaries	Practical care
Mean: ____ n: ____	Mean: ____ n: ____	Mean: ____ n: ____	Mean: ____ n: ____

What I notice / context behind my responses

One useful next step or question to discuss

A sustainable self-care practices review

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

INTERPRET THE RESULT CAREFULLY

Do not compute a total score or apply high/low wellbeing categories.

A two-item domain mean is provisional; with fewer than two responses leave it unscored.

Higher frequency is not automatically better in every context; discuss the client's needs and constraints.

DEBRIEF QUESTIONS

01 Which response best reflects a condition you would like to change?

02 What gets in the way of a practice you already value?

03 Which improvement requires organisational support?

04 What would make the next step kind and realistic rather than another demand?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive reports low boundary-practice ratings during a major transition. The agreed action is a team escalation rota, not simply a personal commitment to switch off.

A NEXT-STEP EXPERIMENT

Test one chosen practice or support arrangement for two weeks and discuss what changed.

My conclusion from this activity

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

Research basis: R10 R14 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: B07

Map the people who help you move forward

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

PURPOSE AND INTRODUCTION

A support-network map helps an executive distinguish different kinds of help rather than expecting one person to provide everything. It includes challenge, practical support, perspective, sponsorship and companionship. The aim is a reciprocal network, not a list of people to extract value from.

FACILITATION SEQUENCE

1. Place yourself at the centre and identify people or communities who offer useful forms of support.
2. Label each connection by the support it provides and what you contribute in return.
3. Notice gaps, over-reliance on one relationship and support you have not asked for clearly.
4. Choose one existing relationship to appreciate and one connection to strengthen or develop.
5. Make a specific respectful request, with room for the other person to decline.

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

Protect other people's privacy and do not share the network map without consent.

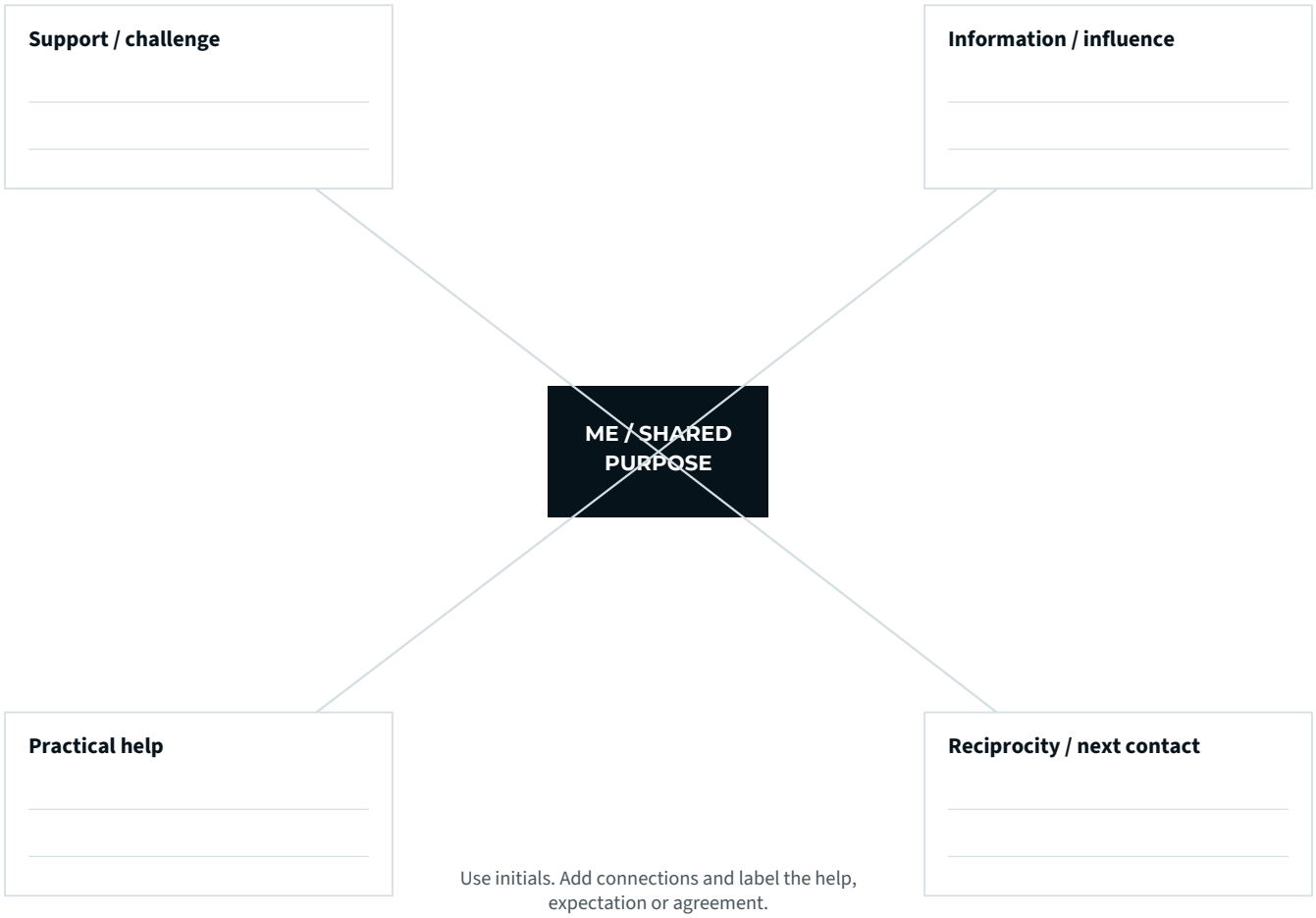
Map the people who help you move forward

ASSESS / APPLY • 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: _____



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 the people who help you move forward

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

INTERPRET THE RESULT CAREFULLY

A larger network is not necessarily a more supportive one.

Different needs may require different people and professional services.

Support quality should be judged through experience, not job title or status.

DEBRIEF QUESTIONS

01 Who challenges you constructively rather than only reassuring you?

02 Where are you expecting too much from one relationship?

03 What support have you not asked for explicitly?

04 How can this network remain reciprocal?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A country manager separates technical mentoring, peer challenge and friendship rather than expecting her line manager to meet all three needs.

A NEXT-STEP EXPERIMENT

Appreciate one helpful connection and make one clearly bounded request this fortnight.

My conclusion from this activity

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

Research basis: R05 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: L03, E48, R07

Redesign the work you enjoy and endure

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

PURPOSE AND INTRODUCTION

The enjoyment–contribution map distinguishes tasks that are energising, useful, both or neither. It helps an executive explore job design without assuming that all disliked work should disappear. The exercise also checks whether an enjoyable activity is taking disproportionate space.

FACILITATION SEQUENCE

1. List recurring activities from a representative working week.
2. Rate personal engagement and contribution to the role on separate 0–10 scales, explaining the basis for each.
3. Plot the activities and notice clusters rather than calculating a total.
4. For low-engagement essential work, consider simplification, collaboration, skill development or better timing.
5. Choose one redesign and one activity to protect, checking workload and fairness for others.

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

Consider role requirements, fairness and team capacity before reallocating work.

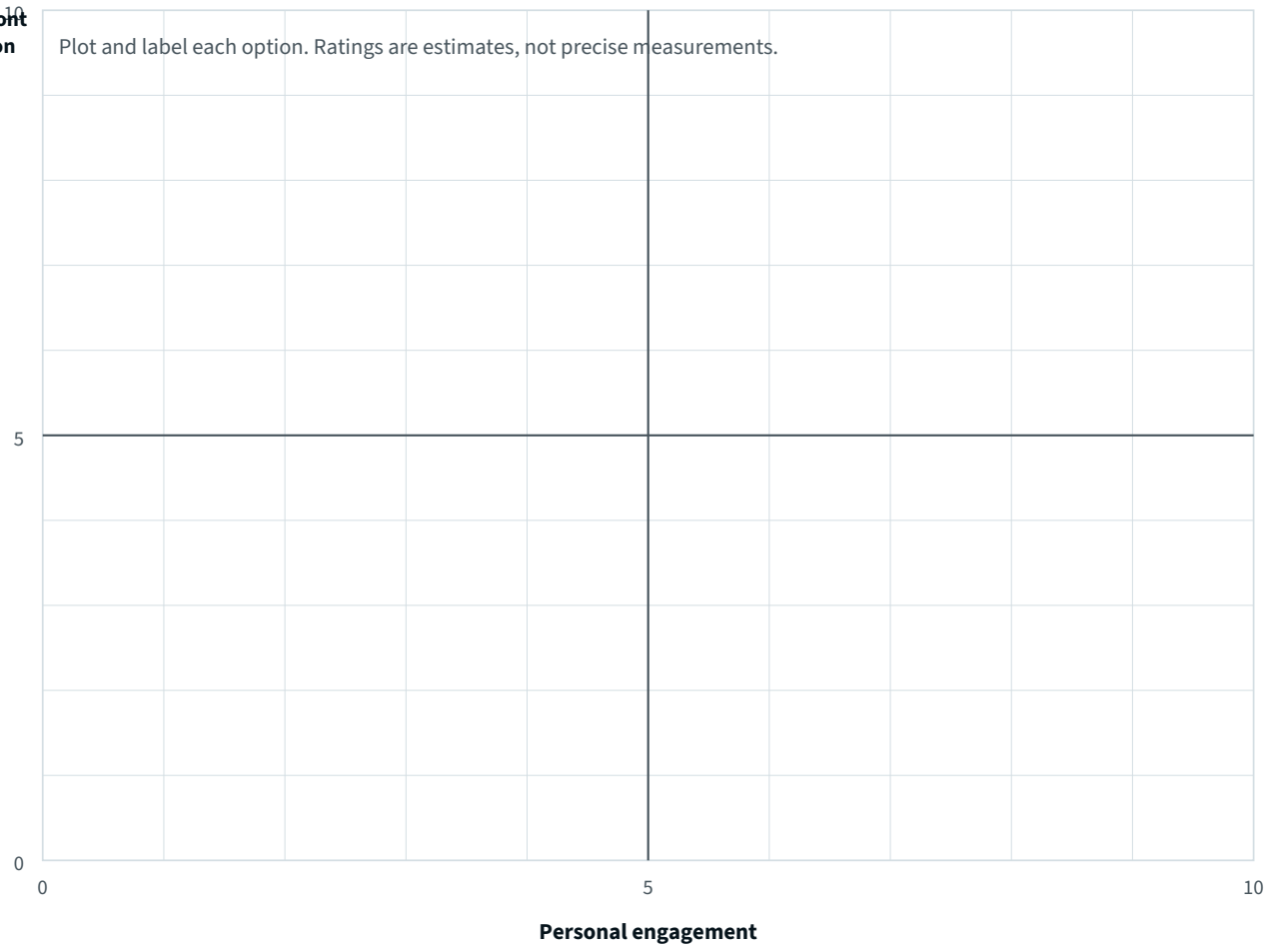
Redesign the work you enjoy and endure

ASSESS / APPLY • 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: _____



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

Redesign the work you enjoy and endure

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

INTERPRET THE RESULT CAREFULLY

Enjoyment and contribution are separate dimensions.

A low-engagement task may remain a legitimate responsibility.

The map generates job-design hypotheses, not a recommendation to abandon the role.

DEBRIEF QUESTIONS

01 Which useful activity do you enjoy less because of how it is organised?

02 What enjoyable work may be crowding out a responsibility?

03 Where could a change in method matter more than a change in task?

04 How will you avoid transferring only unpleasant work to others?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader dislikes lengthy reporting but values the decisions it supports. She co-designs a shorter dashboard and retains a focused interpretation meeting.

A NEXT-STEP EXPERIMENT

Test one task redesign for two cycles and review both engagement and contribution.

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: L04

Build a wheel for the question you actually have

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

PURPOSE AND INTRODUCTION

A custom wheel allows the coach and client to define relevant dimensions instead of forcing a standard life or leadership model onto every situation. It can organise discussion of a transition, partnership or role. The quality of the definitions matters more than the visual shape.

FACILITATION SEQUENCE

1. Write the question the wheel should help you explore.
2. Agree six to eight non-overlapping dimensions that make sense to the client.
3. Define the scale anchors and the evidence considered for each dimension; avoid mixing satisfaction and competence on the same wheel.
4. Rate, plot and discuss the pattern, leaving missing dimensions blank rather than guessing.
5. Choose one dimension to explore and identify a concrete next action or evidence-gathering 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

Do not present a bespoke wheel as an assessment with established reliability, validity or norms.

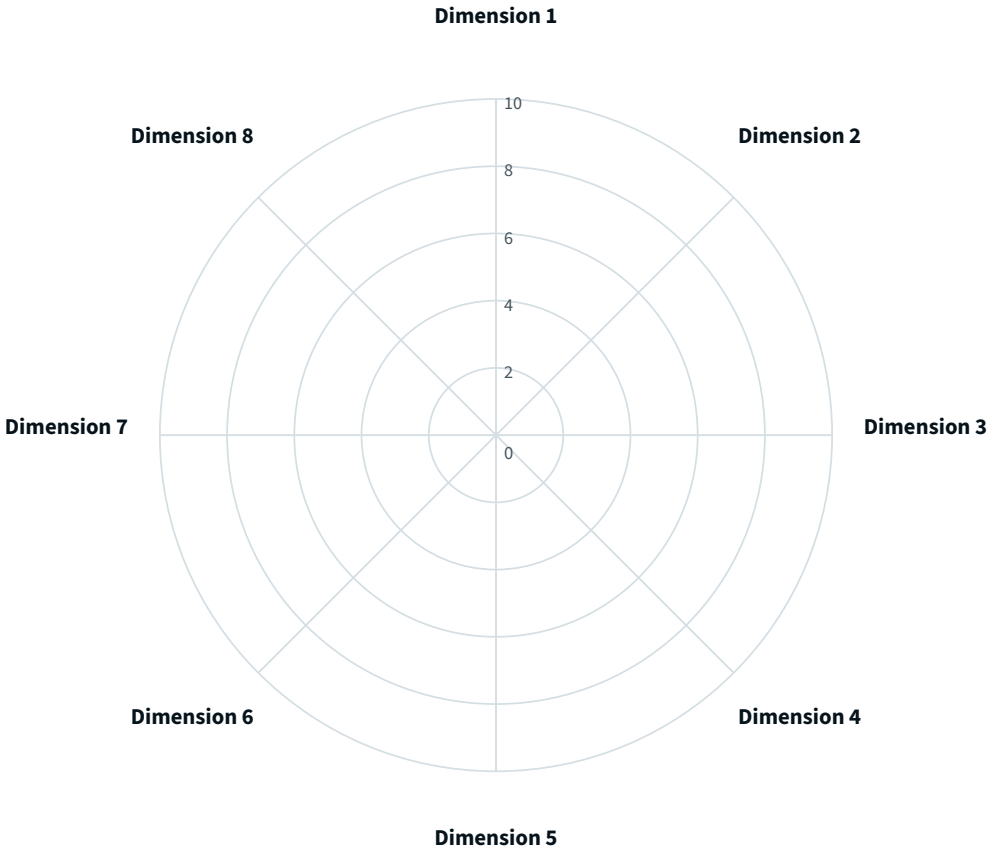
Build a wheel for the question you actually have

ASSESS / APPLY • 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: _____



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

Build a wheel for the question you actually have

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

INTERPRET THE RESULT CAREFULLY

This is a locally designed reflective aid, not a validated scale.

Do not compare scores between differently defined wheels.

Changes in definitions prevent straightforward before-and-after comparisons.

DEBRIEF QUESTIONS

01 What important dimension is missing?

02 Are two spokes describing the same thing?

03 What does a particular rating mean in observable terms?

04 What can the wheel not tell us?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader preparing for a regional role builds a wheel around stakeholder access, decision rights, market knowledge and team readiness rather than using a generic confidence score.

A NEXT-STEP EXPERIMENT

Collect evidence for one uncertain spoke and revise the rating only after revisiting the definition.

My conclusion from this activity

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

Research basis: R01 R19 • Conceptual support; this original activity is not independently validated.

Inventory references: L09, FE04

A diary of what was worth noticing

ASSESS / APPLY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This optional gratitude practice invites the client to notice specific helpful experiences and their sources. It is not a demand to feel positive. The activity works best when small observations are connected to meaning and, where appropriate, an expression of appreciation.

FACILITATION SEQUENCE

1. Choose a brief daily or several-times-weekly reflection period that does not feel burdensome.
2. Record one to three specific experiences you appreciated and what made them meaningful.
3. Notice the people, conditions or your own actions that contributed.
4. Decide whether to express appreciation or create conditions for a similar experience.
5. At the end of the week, review patterns while also acknowledging unresolved difficulties.

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 gratitude to silence complaints, grief or legitimate dissatisfaction.

A diary of what was worth noticing

ASSESS / APPLY • ABOUT 15 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: _____

Date and experience

Why it mattered

Who or what contributed

My contribution

Appreciation to express

Pattern across the week

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

A diary of what was worth noticing

ASSESS / APPLY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

No quota of positive feeling is required.

An entry is useful when it is personally meaningful, not impressive.

Gratitude does not remove the need to address harm or unfairness.

DEBRIEF QUESTIONS

01 What did you notice that might otherwise have passed unnoticed?

02 What made this experience meaningful to you?

03 Where could appreciation be expressed specifically?

04 What difficult reality still needs attention alongside this reflection?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A senior manager notices that a colleague challenged a weak assumption respectfully and sends a specific message explaining why that contribution improved the decision.

A NEXT-STEP EXPERIMENT

Try three short entries over a week and decide whether the practice is useful enough to continue.

My conclusion from this activity

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

Research basis: R09 • Conceptual support; this original activity is not independently validated.

Inventory references: D02, IG11

Make room for what brings you alive

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

PURPOSE AND INTRODUCTION

This exploration identifies activities, conditions and relationships that create genuine interest or enjoyment. It is useful when an executive's life has become dominated by obligation. The output is a small, practical allocation of attention, not an instruction to pursue passion at any cost.

FACILITATION SEQUENCE

1. Recall recent or earlier moments when you felt interested, absorbed or quietly content.
2. Describe what you were doing, who was present and which conditions mattered.
3. Identify recurring ingredients such as learning, making, movement, contribution or connection.
4. Choose one ingredient that can realistically be included in the next fortnight.
5. Plan a small experiment and notice its effect without requiring a dramatic transformation.

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 promise that an enjoyable activity will resolve persistent low mood or other health concerns.

Make room for what brings you alive

ASSESS / APPLY • 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: _____

Drains / demanding conditions

Restores / supportive conditions

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

Make room for what brings you alive

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

INTERPRET THE RESULT CAREFULLY

Enjoyment is personal and may change over time.

A small activity can be worthwhile without becoming a career or income source.

Lack of interest that is persistent or concerning may need a conversation beyond coaching.

DEBRIEF QUESTIONS

01 What kind of enjoyment are you missing rather than what should you enjoy?

02 Which ingredient could fit into ordinary life?

03 What have you dismissed because it seems unproductive?

04 How could you protect this without creating another performance target?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive rediscovers enjoyment in teaching and volunteers for one internal mentoring conversation rather than immediately making a major career change.

A NEXT-STEP EXPERIMENT

Schedule one manageable experience and record what you actually noticed.

My conclusion from this activity

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

Research basis: R05 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: D08, E47, R10, IG03

Create opportunities for genuine friendship

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

PURPOSE AND INTRODUCTION

Friendship can become difficult to sustain through relocation, seniority and demanding work. This activity helps the client create repeated, low-pressure opportunities for connection. It does not treat friendship as a networking target or assume that every person wants a large social circle.

FACILITATION SEQUENCE

1. Describe the kind of social connection you would value and what currently makes it difficult.
2. Identify interests, settings or existing relationships where repeated contact is feasible.
3. Choose one low-pressure invitation or community activity that fits your preferences.
4. Plan how to show interest and follow up without assuming reciprocity.
5. Review the experience and adjust the approach, recognising that closeness develops by mutual choice.

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

Consider cultural norms, personal safety and workplace power dynamics; avoid pressuring colleagues into personal relationships.

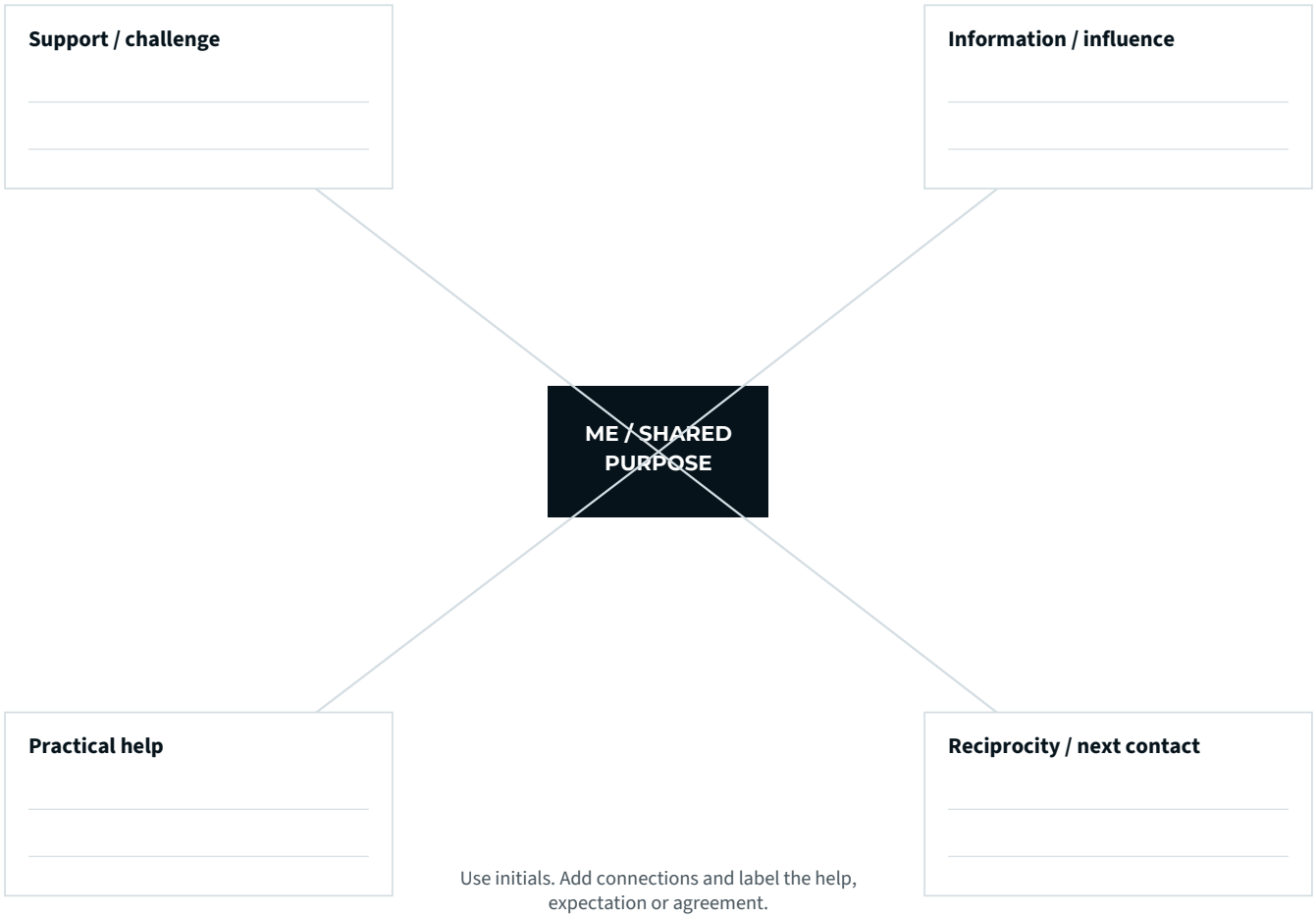
Create opportunities for genuine friendship

ASSESS / APPLY • 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: _____



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

Create opportunities for genuine friendship

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

INTERPRET THE RESULT CAREFULLY

Connection quality matters more than the number of contacts.

A declined invitation is not a reliable judgement of personal worth.

Professional power relationships can complicate friendship and require care.

DEBRIEF QUESTIONS

01 What sort of company feels comfortable and meaningful to you?

02 Where could repeated contact happen naturally?

03 What expectation could make the first step unnecessarily difficult?

04 How will you respect another person's choice not to engage?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A recently relocated executive joins a regular walking group and invites one acquaintance for coffee without treating the meeting as a business-development opportunity.

A NEXT-STEP EXPERIMENT

Make one appropriate invitation or attend one recurring activity, then reflect on fit rather than success or failure.

My conclusion from this activity

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

Research basis: R05 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M08

Strengthen a working relationship deliberately

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

PURPOSE AND INTRODUCTION

This work-relationship inventory examines a small number of relationships that matter to an executive's effectiveness. It distinguishes trust, expectation clarity, information flow and constructive challenge. The aim is a specific improvement conversation, not a ranking of colleagues.

FACILITATION SEQUENCE

1. Choose up to six working relationships relevant to a current goal.
2. For each, record an example of what works and what creates friction.
3. Consider clarity of expectations, reliability of commitments, access to information and ability to disagree constructively.
4. Select one relationship where a practical change could improve the work.
5. Prepare a conversation that asks for the other person's perspective and ends with a mutual agreement.

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 inventory to diagnose personality or create secret labels for colleagues.

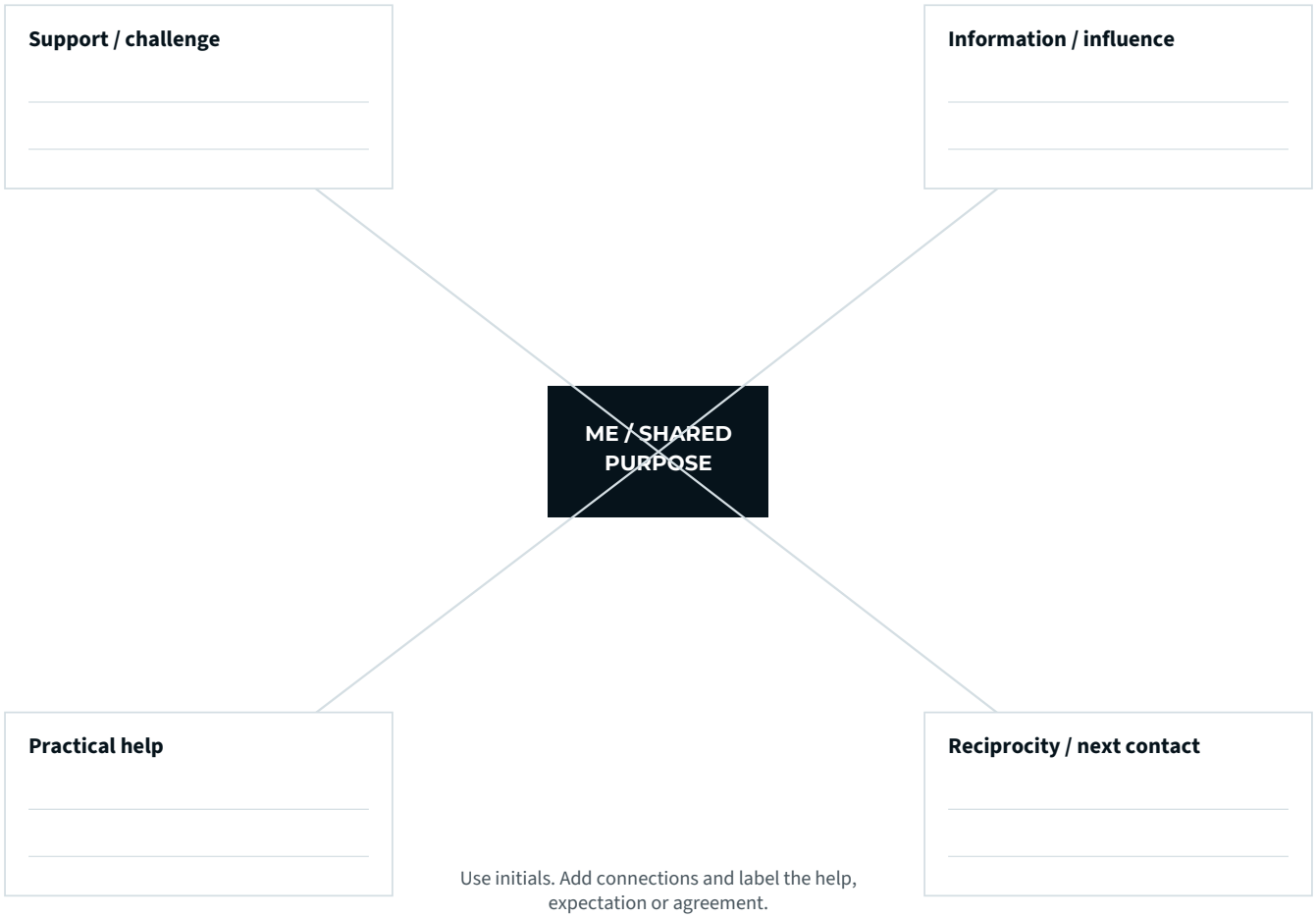
Strengthen a working relationship deliberately

ASSESS / APPLY • 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: _____



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

Strengthen a working relationship deliberately

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

INTERPRET THE RESULT CAREFULLY

The inventory records one perspective and should be tested through conversation.

Trust is not a single trait; reliability and openness may differ by situation.

A relationship improvement should benefit the shared work, not just the client's convenience.

DEBRIEF QUESTIONS

01 What might this person say about working with you?

02 Which expectation has never been made explicit?

03 What evidence supports your view of the relationship?

04 What small reciprocal agreement could improve the work?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

Two functional directors agree when to consult before decisions after discovering that each interpreted the other's speed as disregard for their responsibilities.

A NEXT-STEP EXPERIMENT

Hold one relationship conversation and review the agreed behaviour after two relevant interactions.

My conclusion from this activity

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

Research basis: R12 R11 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: E31

Restore useful energy at work

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

PURPOSE AND INTRODUCTION

This work-focused version of the energy review examines how task design, autonomy, clarity and recovery affect engagement during the working day. It moves beyond general self-care to identify a practical change in the work system.

FACILITATION SEQUENCE

1. Choose a representative week and identify periods of useful engagement and depletion.
2. Record the task, people, decision conditions and breaks around those periods.
3. Look for patterns in demands, control, support, role clarity and unnecessary rework.
4. Choose one change within your authority and one request requiring agreement.
5. Review the change against work quality and your experience, not only the amount completed.

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

Persistent exhaustion or concerning symptoms should prompt appropriate professional support.

Restore useful energy at work

ASSESS / APPLY • 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: _____

Drains / demanding conditions

Restores / supportive conditions

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

Restore useful energy at work

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

INTERPRET THE RESULT CAREFULLY

Energy ratings are descriptive, not medical indicators.

A work-design problem should not be reframed solely as individual resilience.

Consider whether improved energy coincides with better judgement and sustainable delivery.

DEBRIEF QUESTIONS

01 What work condition makes the largest difference to your engagement?

02 Where is avoidable uncertainty consuming effort?

03 What recovery opportunity is realistic during the day?

04 Which change would help the team as well as you?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director moves complex decisions away from the end of an overloaded meeting sequence and introduces clearer pre-reading and decision questions.

A NEXT-STEP EXPERIMENT

Test one change across three comparable work occasions and note the pattern.

My conclusion from this activity

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

Research basis: R14 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: E40, Q25

Add one source of brightness to an ordinary week

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

PURPOSE AND INTRODUCTION

This activity identifies a small improvement to the immediate experience of life or work. It is deliberately modest: a helpful environment, a meaningful connection or an activity that restores interest. It can be used early in a renewal programme to create a feasible first experiment.

FACILITATION SEQUENCE

1. Notice three parts of an ordinary week that feel flat, cluttered or disconnected.
2. For each, imagine a small improvement that does not depend on major life change.
3. Choose one idea that fits your budget, access needs and available time.
4. Specify when and how you will try it, including any permission or support required.
5. Review whether the experience was worthwhile and decide to keep, adapt or stop it.

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 minimising grief, distress or harmful conditions with a demand to brighten up.

Add one source of brightness to an ordinary week

ASSESS / APPLY • 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: _____

Ordinary moment to improve

Small idea

Why it matters

Time and resources

Trial arrangement

Keep, adapt or stop

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

Add one source of brightness to an ordinary week

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

INTERPRET THE RESULT CAREFULLY

Small improvements can be valuable without solving the larger problem.

The client decides what counts as worthwhile.

A modest action should not distract from a serious unresolved issue.

DEBRIEF QUESTIONS

01 What would make an ordinary day slightly more satisfying?

02 Which idea is genuinely yours rather than a social expectation?

03 How can the first experiment stay small?

04 What did the experience teach you about what matters?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader arranges a short weekly lunch with a trusted peer to create a reliable moment of connection during an isolating assignment.

A NEXT-STEP EXPERIMENT

Try one small change twice and decide whether to continue it.

My conclusion from this activity

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

Research basis: R19 R05 • Conceptual support; this original activity is not independently validated.

Inventory references: R01, IG03

Kindness as a series of chosen actions

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

PURPOSE AND INTRODUCTION

The kindness grid turns a broad intention into specific, low-pressure actions. It is not a competition and completion of a line is optional. In executive coaching, the focus is respectful attention, useful help and fair behaviour rather than conspicuous generosity.

FACILITATION SEQUENCE

1. Review the nine action prompts and adapt any that do not fit your context.
2. Choose two or three actions that are welcome, proportionate and within your role.
3. Complete them over a week without expecting recognition or reciprocal benefit.
4. Record what you did and what you actually observed, avoiding assumptions about the recipient's feelings.
5. Reflect on which behaviours you would like to make part of ordinary leadership practice.

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

Protect confidentiality and avoid gifts or favours that create conflicts of interest.

Kindness as a series of chosen actions

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

Client code: _____ Date: _____

Choose or adapt the prompts with your coach. Completion is not a score. Record what you actually observe and respect other people's choices.

01

Thank someone for a specific contribution.

02

Ask what support would be useful before offering it.

03

Make space for a quieter voice in a discussion.

04

Remove a small avoidable obstacle for someone.

05

Give clear credit for another person's work.

06

Listen without immediately advising.

07

Clarify an expectation that has caused uncertainty.

08

Make a fair boundary explicit.

09

Follow through on a small promise.

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

Evidence, next step and review

Kindness as a series of chosen actions

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

INTERPRET THE RESULT CAREFULLY

Kindness is not measured by the number of boxes completed.

Unrequested help can be intrusive; consider the recipient's agency.

A respectful difficult conversation may be kinder than avoiding necessary feedback.

DEBRIEF QUESTIONS

01 Which action required attention rather than money or status?

02 How did you check that the help was welcome?

03 Where could kindness include a clear boundary or fair decision?

04 What would make this ordinary practice rather than a special event?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader makes time to understand a colleague's workload before offering help and then removes an unnecessary approval step rather than sending generic encouragement.

A NEXT-STEP EXPERIMENT

Choose two actions and record their actual effects without seeking praise.

My conclusion from this activity

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

Research basis: R05 R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FE01, IG02

Plan a season you will be glad to have lived

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

PURPOSE AND INTRODUCTION

This seasonal planner can be used for summer, a leave period or any personally meaningful season. It helps the client choose a few experiences and responsibilities deliberately rather than reach the end feeling that the period disappeared. It does not assume school holidays, travel or a particular climate.

FACILITATION SEQUENCE

1. Define the dates and real constraints of the season, including work and family commitments.
2. Choose three experiences or outcomes that would make the period meaningful.
3. Identify one thing to protect, one thing to reduce and one practical arrangement to make early.
4. Place the commitments on a simple calendar with realistic cost and access considerations.
5. At the end, review what mattered and what you would plan differently next time.

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

Consider local conditions, accessibility and family preferences without making cultural assumptions.

Plan a season you will be glad to have lived

ASSESS / APPLY • 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: _____

Week 1	**Week 2**	**Week 3**	**Week 4**
Week 5	**Week 6**	**Week 7**	**Week 8**
Week 9	**Week 10**	**Week 11**	**Week 12**

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

Plan a season you will be glad to have lived

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

INTERPRET THE RESULT CAREFULLY

A meaningful season does not require travel or high expenditure.

The plan should reflect the client's own priorities, not an idealised lifestyle.

Changed circumstances may justify changing the plan.

DEBRIEF QUESTIONS

01 What would you be pleased to remember about this period?

02 What expectation does not fit your circumstances?

03 Which arrangement needs to be made early?

04 How can the plan leave room for rest and spontaneity?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive planning a hot Gulf summer chooses early-morning activity, family time and one learning project rather than an unrealistic list of outdoor commitments.

A NEXT-STEP EXPERIMENT

Make one practical arrangement this week and place one meaningful experience in the calendar.

My conclusion from this activity

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

Research basis: R03 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: FE02

Notice strain and choose the right response

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

PURPOSE AND INTRODUCTION

This awareness poster and conversation guide helps a client notice changes in their own functioning and connect them to support or work-design action. It is not a stress diagnosis or a clinical screening test. Use the client's own observations and distinguish immediate support needs from longer-term prevention.

FACILITATION SEQUENCE

1. Invite the client to describe changes they have noticed in thinking, feelings, physical comfort or behaviour, without requiring disclosure.
2. Ask when the changes occur and what work or life conditions may be contributing.
3. Consider the work-design areas of demands, control, support, relationships, role and change.
4. Agree an appropriate response: practical adjustment, a conversation with the organisation, occupational health or healthcare support.
5. Record a follow-up date and what would prompt earlier help; stop the exercise if the person needs immediate support.

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 immediate danger, severe symptoms or risk of self-harm, prioritise local emergency or crisis support and the agreed safeguarding procedure.

Notice strain and choose the right response

ASSESS / APPLY • 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: _____

What I have noticed

Context and demands

Appropriate support

Next step / earlier-help signal

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

Notice strain and choose the right response

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

INTERPRET THE RESULT CAREFULLY

Common signs can have many causes and do not establish a diagnosis.

A coach should not interpret physical symptoms or recommend treatment.

Workload and organisational conditions deserve attention alongside individual coping.

DEBRIEF QUESTIONS

01 What change in your usual functioning is most important to notice?

02 What condition could be changed rather than endured?

03 Who is appropriately placed to support you?

04 What would tell you not to wait for the next coaching session?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader notices persistent difficulty switching off and asks for occupational-health support while renegotiating an unsustainable escalation rota with the organisation.

A NEXT-STEP EXPERIMENT

Agree one immediate support step and one work-design conversation, with the client's consent.

My conclusion from this activity

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

Research basis: R14 R13 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FE07, FW03

Five specific things to appreciate

ASSESS / APPLY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This brief gratitude reflection is suitable at the end of a session or a demanding period when the client chooses it. It asks for five concrete observations rather than broad claims that everything is positive. The client may name fewer or decline the exercise.

FACILITATION SEQUENCE

1. Invite the client to consider the recent period and choose whether this reflection is useful today.
2. Record up to five specific experiences, contributions or resources they appreciate.
3. For each, add why it mattered and avoid turning the entry into an obligation.
4. Choose one appreciation to express or one helpful condition to protect.
5. Close by acknowledging anything difficult that still needs attention.

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 activity to avoid discussing loss, injustice or distress.

Five specific things to appreciate

ASSESS / APPLY • ABOUT 15 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: _____

Experience or contribution

Why it mattered

Who or what helped

Appreciation to express

Condition to protect

Difficulty still to address

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

Five specific things to appreciate

ASSESS / APPLY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Five is a prompt, not a required score or completion standard.

Appreciation and dissatisfaction can coexist.

The value lies in attention and meaning, not in comparing lists.

DEBRIEF QUESTIONS

01 Which observation feels most genuine rather than expected?

02 What resource did you already have that you had not noticed?

03 What appreciation could be communicated specifically?

04 What still deserves attention despite these helpful experiences?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

After a demanding project, a director recognises reliable teamwork, a useful challenge, practical family support, an improved process and one moment of genuine rest.

A NEXT-STEP EXPERIMENT

Express one specific appreciation and retain one helpful condition next week.

My conclusion from this activity

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

Research basis: R09 • Conceptual support; this original activity is not independently validated.

Inventory references: FE08, IG11

Review, renewal and closure

ASSURE

Evaluate what changed, retain what works and close the engagement well.

06 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.

Review progress without performing success

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A monthly review should make coaching more useful, not require the client to present a favourable story. This review compares agreed outcomes with observable changes, explores what has not shifted and invites feedback on the coaching relationship. The client controls what, if anything, is shared with a sponsor.

FACILITATION SEQUENCE

1. Revisit the agreed outcomes, baseline examples and actions from the previous period.
2. Record what happened, including partial progress, setbacks and unintended effects.
3. Separate changes plausibly connected with coaching from changes driven by other circumstances.
4. Ask what has been useful or unhelpful about the coaching and agree any adjustment.
5. Select the next priority and confirm the content of any agreed sponsor 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

BOUNDARY AND CARE

Keep sponsor reporting within the explicit confidentiality agreement; do not share private worksheet content by default.

Review progress without performing success

ASSURE • 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: _____

Date / situation	What happened	Evidence / learning

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

Review progress without performing success

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Progress can include a better decision to stop or change a goal.

Client satisfaction is distinct from evidence of behaviour or organisational impact.

Do not attribute all improvement to coaching without considering other causes.

DEBRIEF QUESTIONS

01 What is genuinely different rather than simply discussed more often?

02 What has been less useful than you hoped?

03 What explains the lack of movement on one priority?

04 What should we change about the way we work together?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director reports clearer delegation but no reduction in workload because a new project was added. The review retains the delegation practice and addresses the changed capacity problem.

A NEXT-STEP EXPERIMENT

Agree one adjustment to the coaching process and one next behavioural experiment.

My conclusion from this activity

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

Research basis: R01 R02 R03 • Conceptual support; this original activity is not independently validated.

Inventory references: W05, E04, Q13, R11, SP05, IG09

Close one year and choose the next

ASSURE • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This annual review provides an undated replacement for seasonal year-end worksheets. It combines evidence of contribution, learning, costs and unfinished business before setting future intentions. It is designed to avoid both self-congratulation without evidence and a relentless focus on deficits.

FACILITATION SEQUENCE

1. Define the period and collect a few concrete examples of work, relationships and personal experience.
2. Identify achievements and contributions, then ask what enabled them.
3. Review difficulties, costs and disappointments without turning them into character judgements.
4. Decide what to carry forward, change, release or resolve.
5. Choose a small number of priorities for the next period and link each to a lesson from the 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

Allow the client to omit personal events and avoid imposing a celebratory tone after a difficult year.

Close one year and choose the next

ASSURE • 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: _____

Earlier / context

Recent evidence



Turning point

Now / implication

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

Close one year and choose the next

ASSURE • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The review is not an objective performance rating.

Achievements and wellbeing costs should be considered together.

A priority is stronger when it follows from an explicit lesson or choice.

DEBRIEF QUESTIONS

01 What contribution are you overlooking because it became routine?

02 What did success cost that you do not want to repeat?

03 Which lesson should change an actual choice next year?

04 What unfinished matter needs closure rather than another goal?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader values a successful transformation but recognises the cost of personally resolving every escalation. The next-year priority becomes stronger team decision ownership.

A NEXT-STEP EXPERIMENT

Turn one annual lesson into a concrete decision within the next month.

My conclusion from this activity

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

Research basis: R03 R19 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: V07

A fresh-start review of commitments and conditions

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This reset summary combines several strands of reflection into a manageable change plan. It can be used after a break, at a transition or when the client feels burdened by accumulated commitments. The aim is selective renewal, not a dramatic reinvention.

FACILITATION SEQUENCE

1. Review current commitments, relationship patterns, energy drains and unfinished decisions using the relevant activities already completed.
2. Name what is working and should be protected before identifying what to change.
3. Sort possible changes into continue, simplify, stop, resolve and begin.
4. Choose at most three changes and check that they fit available capacity.
5. Create a short sequence with dates, support and a review of the combined 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

Avoid framing the person as needing a complete overhaul; focus on chosen conditions and behaviours.

A fresh-start review of commitments and conditions

ASSURE • 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: _____

Keep / continue	Change / simplify	Stop / resolve

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

A fresh-start review of commitments and conditions

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

This is a synthesis, not a requirement to complete every preceding worksheet.

A smaller coherent set of changes is more useful than a long improvement list.

Review the combined workload of the changes themselves.

DEBRIEF QUESTIONS

01 What should not be lost in the enthusiasm for a fresh start?

02 Which change would make the others easier?

03 What are you trying to change all at once?

04 How will you recognise a useful reset rather than a temporary burst of activity?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A senior manager protects a helpful mentoring relationship, stops one duplicate report and creates a clearer weekly planning routine rather than adopting ten new habits.

A NEXT-STEP EXPERIMENT

Implement the first change, then review before adding the next.

My conclusion from this activity

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

Research basis: R04 R06 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: S08

Make the learning visible at the end of a programme

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

The programme highlights sheet consolidates useful learning without reducing the engagement to a list of favourite sessions. It connects insights with behaviour, evidence and remaining work. It can support a client-owned closing summary or an agreed sponsor conversation.

FACILITATION SEQUENCE

1. Review the original outcomes and select the most meaningful changes across the programme.
2. For each change, record an example of what you now do differently and what effect you observed.
3. Identify the tools or conversations that helped, without assuming they alone caused the change.
4. Record unfinished priorities, risks to maintenance and support that remains useful.
5. Write a short client-owned summary and decide who may receive it.

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

Obtain consent before sharing summaries, quotations or examples; do not turn programme feedback into marketing by default.

Make the learning visible at the end of a programme

ASSURE • 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: _____

Date / situation	What happened	Evidence / learning

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

Make the learning visible at the end of a programme

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A highlight should connect to a specific example rather than a slogan.

Not every valuable change is immediately visible in business metrics.

The client's narrative and sponsor evidence may differ and should be discussed carefully.

DEBRIEF QUESTIONS

01 What learning has become part of how you work?

02 Which change has the clearest evidence?

03 What remains unfinished and deserves an honest place in the summary?

04 What will help you use the learning without the regular coaching appointment?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader summarises improved decision preparation, more explicit delegation and a better boundary conversation, each supported by a recent example rather than a general claim of transformation.

A NEXT-STEP EXPERIMENT

Choose one practice to maintain and one person who can provide useful feedback after the programme.

My conclusion from this activity

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

Research basis: R01 R02 R11 • Conceptual support; this original activity is not independently validated.

Inventory references: R13

Close the engagement and transfer ownership

ASSURE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

Closure makes the end of coaching explicit and supports the client's continuing agency. This activity reviews progress, remaining needs, support arrangements and the practical ending of the relationship. It avoids manufacturing dependency or treating further coaching as the default answer.

FACILITATION SEQUENCE

1. Revisit the purpose of the engagement and discuss what has and has not been achieved.
2. Ask the client to describe the practices, questions and relationships they will continue using.
3. Identify likely future challenges and agree a self-review or support plan.
4. Confirm any final sponsor communication, records arrangements and outstanding administrative matters.
5. Invite honest feedback and mark the ending in a way that is comfortable for the client.

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

Follow the agreed records and confidentiality arrangements; do not promise deletion or retention periods that have not been established.

Close the engagement and transfer ownership

ASSURE • 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: _____

Retain independently	Support if needed	Close explicitly

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

Close the engagement and transfer ownership

ASSURE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Closure can be appropriate even when some goals remain unfinished.

Further support may come from peers, managers or specialists rather than another coaching package.

Feedback should be invited without pressure to be positive.

DEBRIEF QUESTIONS

01 What are you now better able to do without the coach?

02 What early sign will tell you to seek support?

03 What would you like to say about the way we have worked together?

04 What makes this a useful ending rather than simply the last appointment?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director leaves coaching with a quarterly self-review, an agreed peer challenge conversation and clarity about when to seek specialist advice rather than an automatic renewal.

A NEXT-STEP EXPERIMENT

Schedule one independent review and specify the evidence you will consider.

My conclusion from this activity

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

Research basis: R01 R02 • Conceptual support; this original activity is not independently validated.

Inventory references: R14, FE15, FQ04

Recognise your contribution with evidence

ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This celebration exercise helps a client acknowledge effort, contribution and learning that they might otherwise dismiss. It does not require public recognition or exaggerated affirmations. The client chooses a meaningful way to mark progress while keeping the account grounded in evidence.

FACILITATION SEQUENCE

1. Choose a period or accomplishment you would like to recognise.
2. List specific actions you took, difficulties you navigated and contributions from others.
3. Identify what the experience says about a capability or value you want to retain.
4. Choose an appropriate way to acknowledge the progress, privately or with others.
5. Connect the recognition with a future intention rather than immediately moving to a higher target.

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 pressure the client into public disclosure, spending money or a celebratory mood.

Recognise your contribution with evidence

ASSURE • 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: _____

Progress to recognise

My specific contribution

Help from others

Capability or value expressed

How to mark the progress

What to carry forward

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

Recognise your contribution with evidence

ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Recognition does not require exceptional achievement.

Specific evidence is more credible than global claims of greatness.

Acknowledging others and acknowledging yourself are compatible.

DEBRIEF QUESTIONS

01 What have you minimised that deserves a fairer account?

02 What was your contribution without claiming all the credit?

03 How would you prefer to mark this progress?

04 What do you want to remember when a future challenge arises?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader recognises that she handled a difficult consultation with patience and clarity, thanks the colleagues who helped and keeps a short evidence note for future challenging conversations.

A NEXT-STEP EXPERIMENT

Mark one piece of progress in a way that feels genuine and record the capability you want to reuse.

My conclusion from this activity

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

Research basis: R08 R16 • Conceptual support; this original activity is not independently validated.

Inventory references: N05, IG12

J

Workshop activities

ACROSS THE 6A JOURNEY

Create safe participation, useful dialogue and visible commitments.

22 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.

A future worth introducing

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This opening activity lets participants introduce a professional hope rather than recite their job description. It works with four to twenty-four participants and can be completed in pairs before brief group sharing. Participants choose the level of disclosure.

FACILITATION SEQUENCE

1. Explain that each person may share a work-related hope, a learning intention or pass.
2. Give two minutes to complete the sentence: “By the end of this period, I would like to be more able to…” and add why it matters.
3. In pairs, allow each person two minutes to speak while the partner listens without advice.
4. Invite each person to introduce their own hope to the group in one sentence; do not require partners to disclose each other’s material.
5. Capture common learning themes without names and connect them to the session purpose.

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 professional rather than intimate prompts in groups with power differences.

A future worth introducing

ACROSS THE 6A JOURNEY • ABOUT 15 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: _____

My professional hope

Why it matters

What I am comfortable sharing

What I heard in my partner

Shared learning theme

My session intention

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

A future worth introducing

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The hopes are starting points, not contractual promises of workshop outcomes.

A participant who passes is still participating legitimately.

Common themes should guide facilitation without erasing different needs.

DEBRIEF QUESTIONS

01 What made an introduction feel useful rather than performative?

02 What did you learn by listening without advising?

03 Which shared theme could help the group learn together?

04 What would help you participate at the level you choose?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive cohort identifies a shared wish to challenge peers more constructively, which becomes a theme for later listening and feedback practice.

A NEXT-STEP EXPERIMENT

Revisit your opening intention at the end of the session and name one useful change in understanding.

My conclusion from this activity

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

Research basis: R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X01

An animal metaphor, chosen rather than assigned

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original metaphor icebreaker invites participants to choose an animal image for a behaviour they want to bring to the session. It does not assign traits by birth year, culture or zodiac sign. The metaphor is authored by the participant and is used lightly, not as personality assessment.

FACILITATION SEQUENCE

1. Offer a simple set of optional animal words: owl, dolphin, elephant, ant, tortoise, eagle, cat and horse; participants may choose another or no metaphor.
2. Ask each person to choose an image for a useful behaviour they would like to practise today.
3. Give them a minute to explain the meaning in their own words, without facilitator interpretation.
4. Invite a partner to ask how that behaviour would be visible in the session.
5. Close by converting the metaphor into one observable participation intention.

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 infer personality from animals, birth dates or cultural symbolism; offer a plain-language alternative.

An animal metaphor, chosen rather than assigned

ACROSS THE 6A JOURNEY • ABOUT 15 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

What I need to check or understand better

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

An animal metaphor, chosen rather than assigned

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Metaphors are personal prompts, not evidence of stable traits.

The same animal can mean different things to different people.

The useful output is a behavioural intention, not the image itself.

DEBRIEF QUESTIONS

01 What meaning did you choose rather than receive from someone else?

02 How does the image translate into behaviour?

03 What stereotype should we avoid attaching to the metaphor?

04 What would make the activity comfortable for everyone?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A participant chooses a tortoise to represent pausing before responding, while another chooses the same animal to represent steady follow-through.

A NEXT-STEP EXPERIMENT

Try the chosen behaviour once during the workshop and review what happened.

My conclusion from this activity

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

Research basis: R12 R19 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X02

An unexpected professional detail

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This introduction invites a small surprising detail that broadens how participants see one another. It is suitable for groups whose members are known mainly through their organisational roles. The prompt remains optional and professionally appropriate.

FACILITATION SEQUENCE

1. Invite participants to choose one safe fact about a skill, interest or experience that colleagues may not know.
2. Allow quiet preparation and make clear that ordinary details are welcome.
3. In groups of three, each person shares the detail and why it matters to them.
4. Listeners ask one curious, non-intrusive question rather than trying to outperform the story.
5. Invite a brief reflection on assumptions and how colleagues' wider experience could be appreciated.

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 reward the most intimate or dramatic disclosure.

An unexpected professional detail

ACROSS THE 6A JOURNEY • ABOUT 15 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: _____

Detail I choose to share

Why it matters

Boundary on further questions

What I learned about another person

Assumption challenged

Workplace implication

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 unexpected professional detail

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Surprise is not the objective at the expense of comfort.

Sharing a personal detail does not create permission for later disclosure.

The activity can broaden perspective but does not establish trust by itself.

DEBRIEF QUESTIONS

01 What assumption about a colleague became less certain?

02 What made curiosity respectful rather than intrusive?

03 How might wider experience contribute to the work?

04 What can remain private without reducing someone's value to the group?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A finance leader shares experience of community theatre, prompting a discussion about rehearsal and listening rather than a judgement about personality.

A NEXT-STEP EXPERIMENT

Ask one colleague about a relevant experience beyond their current role, with permission.

My conclusion from this activity

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

Research basis: R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X03

The contribution others can actually see

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This appreciative feedback activity helps participants hear specific examples of their useful behaviour. It works best where people have enough shared experience to comment credibly. For newly formed groups, use observed workshop behaviour rather than invented character descriptions.

FACILITATION SEQUENCE

1. Explain that feedback must describe a behaviour and its helpful effect, not a personality label.
2. Give each participant a card headed “A contribution I have observed”.
3. In pairs or small groups, offer one example using: “When you…, it helped…”; the recipient may ask a clarifying question.
4. The recipient records the feedback and identifies what feels accurate, surprising or uncertain.
5. Choose one behaviour to retain and, where appropriate, seek another example later.

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 force public feedback in unsafe relationships or substitute this exercise for a formal 360 assessment.

The contribution others can actually see

ACROSS THE 6A JOURNEY • 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: _____

Observed behaviour

Situation

Helpful effect

What I recognise

What I want to clarify

Behaviour to retain

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

The contribution others can actually see

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Positive feedback is still one person's perspective.

Specific examples are more useful than global praise.

Do not infer a competency score from a short workshop exchange.

DEBRIEF QUESTIONS

01 What evidence made the feedback credible?

02 What contribution do you tend not to notice in yourself?

03 Where does the feedback differ from your own view?

04 How could you use the information without turning it into a fixed identity?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A participant learns that her concise summaries help the team see decisions, rather than simply receiving the label "good communicator".

A NEXT-STEP EXPERIMENT

Deliberately use the identified behaviour in one relevant meeting and observe its effect.

My conclusion from this activity

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

Research basis: R11 R22 R12 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X04

Coordinate without the usual channel

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This communication exercise explores how a group creates shared meaning under a temporary constraint. Participants arrange themselves or their name cards in an agreed order without speaking. It is a learning experiment, not a test of intelligence or teamwork competence.

FACILITATION SEQUENCE

1. Choose an accessible ordering task, such as alphabetical order of first names or months of joining the organisation; avoid age, pay or other sensitive information.
2. Agree a no-speaking rule for two minutes, while allowing writing, gesture or a digital board as appropriate.
3. Ask the group to create the order and note how clarification, leadership and checking occur.
4. Remove the constraint and allow the group to verify and correct the result.
5. Debrief the process, especially assumptions and inclusive ways of making information visible.

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

Offer a seated or digital version and do not require movement, hearing, speech or disclosure that excludes participants.

Coordinate without the usual channel

ACROSS THE 6A JOURNEY • ABOUT 15 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: _____

Input / request	→	Owner / decision	→	Handover	→	Check / response

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

Coordinate without the usual channel

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The constraint is artificial and should not be over-generalised to workplace ability.

Success depends on the chosen task and access conditions.

The most useful learning concerns clarification and inclusion.

DEBRIEF QUESTIONS

01 How did the group establish shared understanding?

02 What information was assumed rather than checked?

03 Whose participation was made easier or harder by the rule?

04 What checking habit would be useful in real coordination?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A project team notices that two people were left out of the checking process and agrees to verify decisions with every affected workstream.

A NEXT-STEP EXPERIMENT

Use an explicit check-back in the next coordination meeting.

My conclusion from this activity

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

Research basis: R12 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X05

A nine-square connection search

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This structured conversation grid helps participants find shared experiences and useful differences. It is suitable for a new cohort and can be run seated, in breakout rooms or through a shared document. The aim is conversation, not racing to complete a card.

FACILITATION SEQUENCE

1. Provide the nine prompts and invite participants to replace any that do not suit the group.
2. Ask people to speak with several colleagues and record a first name only with permission when a prompt applies.
3. Require a brief conversation about the experience rather than simply collecting signatures.
4. Stop after a set period whether or not anyone has completed a line.
5. Debrief one useful connection, one difference and a question worth continuing.

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 non-sensitive prompts and offer a small-group alternative to free movement.

A nine-square connection search

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Choose or adapt the prompts with your coach. Completion is not a score. Record what you actually observe and respect other people's choices.

01 Has learned a useful skill from a colleague.	**02** Has worked across more than one function.	**03** Has changed their mind after feedback.
04 Has a practical way to prepare for a difficult meeting.	**05** Has helped someone settle into a new role.	**06** Has simplified an unnecessary process.
07 Has worked with a geographically dispersed team.	**08** Has tried a new way of learning recently.	**09** Has a question they hope this workshop will help answer.

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

Evidence, next step and review

A nine-square connection search

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Completion is not a measure of sociability or success.

Participants can respond to a prompt in different legitimate ways.

Names and notes should not be collected for marketing or unrelated use.

DEBRIEF QUESTIONS

01 Which conversation went beyond finding a match?

02 What difference was useful to understand?

03 How did you avoid making assumptions about someone's experience?

04 Which connection could support learning after today?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

Two leaders discover experience of remote team transitions and agree to compare one practical lesson after the workshop.

A NEXT-STEP EXPERIMENT

Continue one mutually useful conversation after the session.

My conclusion from this activity

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

Research basis: R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X06, FW05

The experience behind an unusual fact

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This version of an unusual-fact exercise moves beyond novelty to explore learning from a chosen experience. It can be used after initial introductions to encourage curiosity while preserving privacy. The facilitator does not interpret the fact as evidence of personality.

FACILITATION SEQUENCE

1. Ask each person to choose a safe, unusual professional or learning experience they are comfortable discussing.
2. In pairs, one person describes the experience briefly and the other asks what they learned.
3. The listener reflects back the learning rather than judging how unusual the story was.
4. Swap roles and invite each person to identify a possible connection to current work.
5. Share only the learning the speaker agrees to make public.

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

No participant should be asked to reveal trauma, confidential incidents or protected personal information.

The experience behind an unusual fact

ACROSS THE 6A JOURNEY • ABOUT 20 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: _____

Earlier / context

Recent evidence



Turning point

Now / implication

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

The experience behind an unusual fact

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The learning belongs to the speaker; the listener checks rather than interprets.

Ordinary experience may contain equally valuable learning.

A memorable story is not proof of a general capability.

DEBRIEF QUESTIONS

01 What learning became clearer when someone reflected it back?

02 What did you notice about your own curiosity?

03 How can unusual experience become useful rather than merely entertaining?

04 What boundary helped the conversation stay comfortable?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader describes organising a volunteer event and identifies a transferable lesson about clarifying ownership before enthusiasm turns into duplication.

A NEXT-STEP EXPERIMENT

Apply one lesson from the experience to a current work situation.

My conclusion from this activity

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

Research basis: R17 R12 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X07

A message from your considered judgement

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This reflective writing activity invites participants to hear their own considered perspective beneath immediate noise. It is not a claim that unconscious messages contain privileged truth. The writing is treated as material for inquiry and tested against evidence.

FACILITATION SEQUENCE

1. Invite each participant to choose a current professional question and write it privately.
2. Allow three quiet minutes to complete: “What I may need to acknowledge is…” without editing for presentation.
3. Ask participants to underline one sentence that feels worth examining.
4. For that sentence, identify supporting evidence, uncertainty and a practical implication.
5. Share only by choice, then convert the reflection into one question or action to test.

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 automatic writing as diagnosis or push for personal disclosure in a group.

A message from your considered judgement

ACROSS THE 6A JOURNEY • ABOUT 20 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: _____

Professional question

Unedited reflection

Sentence to examine

Evidence and uncertainty

Question to test

Next action

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

A message from your considered judgement

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Free writing can surface a perspective but does not validate it.

The participant may keep the entire page private.

A strong emotional response is a reason for care, not proof of accuracy.

DEBRIEF QUESTIONS

01 What did writing make easier to acknowledge?

02 Which sentence is an interpretation rather than a fact?

03 What evidence would help you evaluate it?

04 What small action follows without treating the reflection as unquestionable truth?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader writes that she is avoiding an unclear accountability conversation, then checks the evidence and prepares a specific question rather than assuming she knows the other person's motives.

A NEXT-STEP EXPERIMENT

Test one practical implication in a low-risk way.

My conclusion from this activity

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

Research basis: R19 R15 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X08

Facts, guesses and the confidence of our assumptions

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This light introduction uses true and invented professional statements to examine how quickly people infer from limited evidence. It should remain low stakes. The debrief focuses on the reasoning used rather than the ability to deceive.

FACILITATION SEQUENCE

1. Ask each participant to prepare two true, safe statements about professional or learning experience and one invented statement.
2. In groups of three or four, one person reads the statements without requiring theatrical delivery.
3. Others identify which they think is invented and state the clue they used.
4. The speaker reveals the answer and corrects any assumptions they do not want left standing.
5. Debrief how appearance, role or familiarity influenced judgement and where checking would be wiser.

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 safe, voluntary statements and avoid sensitive identity, health, family or confidential business content.

Facts, guesses and the confidence of our assumptions

ACROSS THE 6A JOURNEY • ABOUT 20 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: _____

Three safe statements	My initial judgement	Clue or assumption used

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

Facts, guesses and the confidence of our assumptions

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The exercise demonstrates uncertainty, not an ability to detect dishonesty.

Correct guesses can occur by chance.

Never generalise performance in the game to integrity or credibility.

DEBRIEF QUESTIONS

01 What clue did you rely on and how reliable was it?

02 Which assumption came from the person's role or appearance?

03 How quickly did confidence exceed evidence?

04 Where at work should you ask rather than guess?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A group realises it assumed a quiet colleague had never led a large event and discusses how role expectations can narrow curiosity.

A NEXT-STEP EXPERIMENT

Ask one clarifying question before making a similar workplace assumption.

My conclusion from this activity

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

Research basis: R12 R15 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X09

Test the statement before taking a position

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This second true-or-false variant uses workplace propositions rather than personal facts. It encourages participants to distinguish an absolute claim, a context-dependent judgement and an evidence question. There is no hidden answer key for complex management questions.

FACILITATION SEQUENCE

1. Present the four original propositions and allow silent individual responses: agree, disagree or it depends.
2. Ask participants to identify the conditions under which each statement might hold.
3. In small groups, distinguish evidence, experience and assumption in the discussion.
4. Rewrite one overgeneralised statement as a more precise, testable proposition.
5. Agree what information would be needed to make a real organisational decision.

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

Facilitate disagreement without evaluating participants' worth or intelligence.

Test the statement before taking a position

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

01	More feedback always improves performance.
02	A confident leader is necessarily a competent leader.
03	Delegating a task always saves the leader time immediately.
04	A clear goal is enough to ensure action.

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

Evidence, next step and review

Test the statement before taking a position

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

It depends is useful only when the relevant conditions are specified.

The activity does not establish a universal management rule.

Changing a view after considering evidence is a learning outcome, not a loss.

DEBRIEF QUESTIONS

01 Which statement tempted you into an absolute answer?

02 What condition changed your view?

03 How did you distinguish experience from general evidence?

04 What would a more testable version of the claim look like?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A group rewrites “More feedback always improves performance” as a question about specific, timely and usable feedback in a defined task context.

A NEXT-STEP EXPERIMENT

Rewrite one absolute claim used in your team as a conditional, evidence-seeking question.

My conclusion from this activity

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

Research basis: R22 R12 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X10

Seven words, then the meaning behind them

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This concise reflection asks participants to express a learning intention or professional contribution in exactly seven words, then explore what compression reveals and conceals. The word limit is a creative constraint, not a test of language ability.

FACILITATION SEQUENCE

1. Choose a prompt: “The contribution I want to make” or “What I want to learn today”.
2. Allow three minutes to draft seven words, with an unrestricted prose alternative for anyone who prefers it.
3. In pairs, ask each person to explain the meaning and identify one word that matters most.
4. Invite the listener to ask what is missing or ambiguous in the statement.
5. Translate the chosen word into one observable behaviour during the session.

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

Offer additional preparation time and a no-word-limit alternative, especially in multilingual groups.

Seven words, then the meaning behind them

ACROSS THE 6A JOURNEY • ABOUT 15 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: _____

1	2	3	4	5	6	7

Meaning behind the words / what the short statement leaves out

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

Seven words, then the meaning behind them

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A memorable phrase is not a complete strategy or assessment of purpose.

Language fluency should not determine participation value.

The useful outcome is the explanation and behavioural connection.

DEBRIEF QUESTIONS

01 What became clearer when you had to choose words carefully?

02 What important nuance did the short statement lose?

03 Which word needs to become a behaviour?

04 How can concise communication remain accurate?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A participant writes “Create clarity so others can act confidently” and identifies confirming decision rights as the behaviour she will practise.

A NEXT-STEP EXPERIMENT

Use the chosen behaviour once and revisit whether the seven words still fit.

My conclusion from this activity

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

Research basis: R12 R03 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X11

Turn familiar phrases into clear meaning

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original phrase-awareness activity helps a group notice management language that can obscure decisions. A bingo-style grid creates lightness, but the purpose is clarification rather than ridicule. Participants translate vague expressions into specific actions, owners or evidence.

FACILITATION SEQUENCE

1. Agree that the exercise critiques language, not people, and choose nine phrases the group genuinely encounters.
2. Use the supplied phrases as a starting point, replacing any that are not relevant.
3. During a discussion or a short fictional meeting, mark a phrase when heard and write what it might mean.
4. Pause to translate selected phrases into a clear decision, action, owner or question.
5. Agree one language habit that would improve the group's actual meetings.

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 sarcastic scoring or targeting a particular person's speech.

Turn familiar phrases into clear meaning

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Choose or adapt the prompts with your coach. Completion is not a score. Record what you actually observe and respect other people's choices.

01

We need alignment.

02

Let us take this offline.

03

We should be more strategic.

04

We need ownership.

05

Let us circle back.

06

We need a quick win.

07

This is a priority.

08

We need better communication.

09

Let us be more proactive.

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

Evidence, next step and review

Turn familiar phrases into clear meaning

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The presence of a phrase does not prove poor thinking.

Context and shared understanding determine whether shorthand works.

Do not use the grid to embarrass colleagues or police accents and language fluency.

DEBRIEF QUESTIONS

01 Which phrase concealed more than it explained?

02 What respectful question clarified the meaning?

03 When is shorthand helpful rather than evasive?

04 What would more precise language change in your meetings?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

“We need alignment” becomes “The two directors need to agree the decision owner and approval date before Friday.”

A NEXT-STEP EXPERIMENT

Ask one respectful meaning-check question in the next meeting.

My conclusion from this activity

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

Research basis: R12 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X12

Keep the commitments moving

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This coordination simulation represents commitments with paper tokens rather than requiring balloons or physical agility. It explores work in progress, handovers and the effect of adding demands. A balloon option is possible only where safe and accessible; the learning does not depend on it.

FACILITATION SEQUENCE

1. Give each small group six labelled paper tokens representing work items and agree that each must pass through three named roles.
2. Run a one-minute round with no planning, recording completed items, waiting items and unclear handovers.
3. Add two new items or one changed requirement and repeat briefly.
4. Allow the group to redesign its process, including ownership, work-in-progress limits and checking.
5. Run a final round and compare the process and experience rather than ranking teams.

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 seated or digital tokens by default; avoid latex, physical contact, speed pressure or activities that exclude participants.

Keep the commitments moving

ACROSS THE 6A JOURNEY • 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: _____

Input / request	→	Owner / decision	→	Handover	→	Check / response

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

Keep the commitments moving

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The simulation is not a validated measure of team performance.

An apparent improvement may reflect familiarity as well as the redesign.

The debrief should focus on mechanisms the group can observe.

DEBRIEF QUESTIONS

01 Where did the group lose track of ownership?

02 What happened when demand increased?

03 Which process change mattered more than individual speed?

04 What limit or handover agreement would help real work?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leadership team notices that starting every item creates queues and agrees to limit simultaneous initiatives until owners and dependencies are clear.

A NEXT-STEP EXPERIMENT

Clarify one real handover or work-in-progress limit in the coming week.

My conclusion from this activity

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

Research basis: R12 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X13

Replace a label with observable evidence

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This labelling exercise uses fictional workplace descriptions to examine how labels narrow interpretation. It does not attach labels to participants or ask them to act out stereotypes. The group practises replacing a judgement with observation, uncertainty and a fair question.

FACILITATION SEQUENCE

1. Present the four fictional labels and ask participants what evidence would be needed before accepting them.
2. Give each group a label and ask them to generate at least two alternative explanations for the behaviour it might describe.
3. Rewrite the label as a specific observation with context and effect.
4. Prepare a respectful question that checks understanding with the person concerned.
5. Debrief how labels influence opportunity, feedback and everyday decisions.

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 protected characteristics, degrading stereotypes or real confidential employee cases.

Replace a label with observable evidence

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

01	Resistant to change
02	Not committed
03	Too quiet to lead
04	Difficult to work with

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

Evidence, next step and review

Replace a label with observable evidence

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A neutral description still requires accurate observation.

Avoiding labels does not mean avoiding accountability for harmful behaviour.

The activity does not diagnose bias in individual participants.

DEBRIEF QUESTIONS

01 What information disappears when we use a label?

02 Which alternative explanation deserves checking?

03 How could the label influence someone's opportunities?

04 What wording would make feedback fairer and more useful?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

"Not committed" becomes "Missed two agreed deadlines without an update", followed by a question about workload, expectations and the reasons for the missed communication.

A NEXT-STEP EXPERIMENT

Rewrite one label in your own thinking as an observation and a question.

My conclusion from this activity

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

Research basis: R15 R12 R22 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X14

See the decision from another role

ACROSS THE 6A JOURNEY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

Perspective-taking helps participants consider what a decision may look like from another stakeholder's position. It does not claim access to that person's thoughts. The exercise separates reasonable hypotheses from information that must be obtained through real dialogue.

FACILITATION SEQUENCE

1. Choose a non-confidential decision with at least three affected roles.
2. Assign or let participants choose a role and provide only known facts about its responsibilities and constraints.
3. Ask each person to identify possible priorities, concerns and information needs from that role.
4. Mark each statement as known, plausible or unknown, then compare perspectives.
5. Prepare questions for the real stakeholders and revise the decision process to include their input.

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 acting out cultural, gender or other identity stereotypes; focus on responsibilities and known context.

See the decision from another role

ACROSS THE 6A JOURNEY • 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: _____

Decision and stakeholder role

Known responsibilities

Possible priorities

Possible concerns

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

See the decision from another role

ACROSS THE 6A JOURNEY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Perspective-taking produces hypotheses, not mind-reading.

People in the same role may have different views.

The strongest next step is often better consultation rather than a more elaborate imagined perspective.

DEBRIEF QUESTIONS

01 What became visible from another role's responsibilities?

02 Which assumption are you most tempted to treat as fact?

03 What would you need to ask the actual stakeholder?

04 How should the decision process change as a result?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leadership team considers a scheduling change from service, employee and customer perspectives, then tests the assumptions with representatives before deciding.

A NEXT-STEP EXPERIMENT

Ask one real stakeholder a question generated by the exercise.

My conclusion from this activity

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

Research basis: R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X15

Take a position, then examine the conditions

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This opinion-continuum activity makes different views visible while allowing participants to change their position. It is useful for exploring a working principle or a design choice, not for forcing public disclosure on sensitive topics.

FACILITATION SEQUENCE

1. Choose a professionally relevant proposition, such as “This team should delegate more decisions”.
2. Offer a physical line, seated number card or private digital response from strongly disagree to strongly agree, including an uncertain option.
3. Invite volunteers from different positions to explain the conditions and evidence behind their view.
4. Ask what new information or condition would move their position, then allow a second private or public response.
5. Summarise the decision questions that remain rather than declaring a winning side.

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 anonymous or private responses where hierarchy makes public positioning unsafe.

Take a position, then examine the conditions

ACROSS THE 6A JOURNEY • 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: _____

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

Current position



Preferred workable position



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

Take a position, then examine the conditions

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Visible agreement can reflect conformity or power as well as genuine belief.

A changed position may indicate learning rather than inconsistency.

The continuum is a discussion aid, not a vote unless that is explicitly agreed.

DEBRIEF QUESTIONS

01 What did you learn from a position different from your own?

02 Which condition mattered more than the headline statement?

03 What made it easier or harder to change your mind?

04 What decision needs more evidence before agreement?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A team discovers that disagreement about delegation concerns different risk thresholds, then defines which decisions require consultation rather than debating delegation in the abstract.

A NEXT-STEP EXPERIMENT

Clarify one disputed condition before the team's next decision.

My conclusion from this activity

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

Research basis: R12 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X16

Write the future story with evidence

ACROSS THE 6A JOURNEY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

A group future-news exercise creates a shared picture of a worthwhile outcome, then tests the story against actions and evidence. It is not a prediction or a substitute for strategy. The group must include stakeholders, trade-offs and what would make the headline credible.

FACILITATION SEQUENCE

1. Choose a realistic future date and the organisational issue the story will address.
2. In small groups, draft a headline, a short opening paragraph and three pieces of evidence that would support the story.
3. Add a stakeholder voice, clearly marked as imagined, and a paragraph about the challenge that had to be addressed.
4. Compare the stories and identify common outcomes, differences and assumptions.
5. Work backwards to one early action and one assumption to test now.

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 circulate fictional future claims or quotations as actual organisational achievements.

Write the future story with evidence

ACROSS THE 6A JOURNEY • 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: _____

FUTURE STORY: headline, evidence and an explicitly imagined perspective.

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

Write the future story with evidence

ACROSS THE 6A JOURNEY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

All future quotations and outcomes are fictional until observed.

A shared story can conceal disagreement; make differing assumptions visible.

The useful output is a clearer direction and a testable next step.

DEBRIEF QUESTIONS

01 What makes the story more than an attractive slogan?

02 Whose experience is missing from the headline?

03 What difficult choice would have been necessary?

04 What can we test now to make the future more credible?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive team writes a future story about faster service decisions, including evidence of reduced rework and clearer accountability rather than simply claiming a more agile culture.

A NEXT-STEP EXPERIMENT

Test one central assumption before committing to the full vision.

My conclusion from this activity

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

Research basis: R03 R21 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X17

Listen, reflect and check

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This listening practice gives participants a disciplined alternative to immediate advice. It uses short rounds so that the speaker can experience being understood and the listener can practise checking rather than assuming. It is not a therapy exercise.

FACILITATION SEQUENCE

1. Form pairs and invite each speaker to choose a manageable professional issue, not a crisis or highly personal concern.
2. The speaker talks for three minutes while the listener attends without interrupting or preparing a solution.
3. The listener summarises the situation, what seems important and any uncertainty, then asks whether the summary is accurate.
4. The speaker corrects the summary and names what was helpful or missed.
5. Swap roles and debrief one listening behaviour to use at work.

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

Participants may stop or choose a less sensitive topic; keep shared material confidential.

Listen, reflect and check

ACROSS THE 6A JOURNEY • 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: _____

Situation / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

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

Listen, reflect and check

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

An accurate summary is checked by the speaker, not judged by the listener alone.

Listening does not require agreement with every interpretation.

The practice develops a behaviour; it does not certify counselling competence.

DEBRIEF QUESTIONS

01 What did you notice when you delayed giving advice?

02 Where did your summary add an assumption?

03 What made the speaker feel accurately understood?

04 How could you use this skill in a time-limited meeting?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager discovers that a colleague wanted help clarifying a decision, not reassurance or an immediate list of solutions.

A NEXT-STEP EXPERIMENT

Use one checked summary before offering advice in the next relevant conversation.

My conclusion from this activity

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

Research basis: R18 R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X18

Generate options before the group commits

ACROSS THE 6A JOURNEY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This group action-brainstorming exercise separates idea generation from evaluation and makes space for quieter contributors. It is useful after the group has agreed the problem or desired outcome. The final choice remains subject to resources, authority and risk.

FACILITATION SEQUENCE

1. Write a specific outcome and clarify the boundaries for possible action.
2. Allow three minutes of silent individual idea generation before discussion.
3. Share ideas in rounds without immediate evaluation, grouping duplicates only with the contributor's agreement.
4. Evaluate shortlisted options against contribution, feasibility, risk and fairness.
5. Choose one or two actions with owners, evidence and a review point; preserve useful unselected ideas.

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

Clarify who has authority to commit resources and do not imply that workshop agreement alone authorises implementation.

Generate options before the group commits

ACROSS THE 6A JOURNEY • 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: _____

Agreed outcome

Individual ideas

Grouped options

Evaluation criteria

Selected action and owner

Evidence and review

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

Generate options before the group commits

ACROSS THE 6A JOURNEY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The number of ideas is not the measure of quality.

Voting can inform preference but does not replace decision authority or risk review.

Keep rejected ideas available when conditions change.

DEBRIEF QUESTIONS

01 What changed when ideas were generated silently first?

02 Which option was nearly lost because it sounded unusual?

03 What criterion most influenced the choice?

04 What would make the selected action a useful experiment rather than a vague commitment?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A team generates ways to reduce handover errors and chooses a small checklist trial with a named owner rather than launching several uncoordinated initiatives.

A NEXT-STEP EXPERIMENT

Run the selected trial and review evidence before expanding it.

My conclusion from this activity

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

Research basis: R12 R19 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X19, FW01, FW06

Look back at the process as well as the result

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This closing review examines what the group did, how it worked and what should transfer to practice. It can be used after a workshop, simulation or project milestone. The tone is learning-focused rather than a search for someone to blame.

FACILITATION SEQUENCE

1. Restate the purpose of the activity and the result the group intended.
2. Ask participants to record what happened, using observations rather than general impressions.
3. Identify what helped, what hindered and what was within the group's influence.
4. Choose one practice to retain and one change to test next time.
5. Record the learning with an owner or a specific future occasion for use.

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 a learning debrief to bypass a necessary formal investigation of serious incidents.

Look back at the process as well as the result

ACROSS THE 6A JOURNEY • ABOUT 20 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: _____

Date / situation	What happened	Evidence / learning

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

Look back at the process as well as the result

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A useful debrief distinguishes process, result and context.

A disappointing result can still yield valuable learning.

The review is stronger when it changes a future action.

DEBRIEF QUESTIONS

01 What difference between intention and outcome deserves attention?

02 Which helpful behaviour can we repeat deliberately?

03 What explanation are we accepting without evidence?

04 What should change at the next comparable event?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A team recognises that early clarification helped but decision ownership remained vague, so it retains the opening check and adds an explicit decision-owner step.

A NEXT-STEP EXPERIMENT

Use the chosen process change at the next comparable meeting or project milestone.

My conclusion from this activity

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

Research basis: R12 R22 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X20

Name the learning and its first use

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This brief closing activity asks each participant to identify a meaningful learning point and its practical application. It avoids the vague ritual of saying the workshop was useful without specifying what will be different.

FACILITATION SEQUENCE

1. Give each participant two quiet minutes to complete: “The most useful thing I learned was…” and “The first place I will use it is…”.
2. Ask them to add a behaviour another person could observe.
3. In pairs, invite a question that makes the application more specific.
4. Allow voluntary one-sentence sharing with the group.
5. Record a personal review date and any support needed to apply the learning.

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 require public promises that participants lack authority or capacity to fulfil.

Name the learning and its first use

ACROSS THE 6A JOURNEY • ABOUT 15 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: _____

Starting point

Next useful step

Evidence / milestone

Review / decision

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

Name the learning and its first use

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A memorable idea is not yet a changed practice.

The participant chooses the application; the facilitator should not assign one to make the event look effective.

A small specific use is preferable to a broad promise.

DEBRIEF QUESTIONS

01 What makes this learning useful in your actual role?

02 What will you do rather than simply remember?

03 Where might the application be harder than expected?

04 Who could help you notice whether it is working?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader chooses to check decision ownership at the start of the next steering meeting rather than commit vaguely to better communication.

A NEXT-STEP EXPERIMENT

Apply the learning once within a week and record the result.

My conclusion from this activity

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

Research basis: R04 R03 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X21

A note to your future working self

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This closing letter captures a client's own reminder about a chosen change and the conditions that support it. It can be retained privately or returned at an agreed date. The facilitator must not assume permission to store or email personal content.

FACILITATION SEQUENCE

1. Invite each participant to write a short note to themselves at a realistic future date.
2. Include what matters, what they intend to practise, a likely obstacle and a constructive response.
3. Ask them to name one piece of evidence they will look for at the review date.
4. Let them choose whether to keep the note, set a private reminder or consent to an agreed return method.
5. Close by checking that the commitment remains feasible and personally chosen.

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

Obtain explicit consent for storage or later delivery and avoid recording sensitive information unnecessarily.

A note to your future working self

ACROSS THE 6A JOURNEY • ABOUT 20 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: _____

Dear future me

What matters

Practice to continue

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

A note to your future working self

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The note is a cue for reflection, not a guarantee of behaviour change.

A changed context may justify revising the commitment.

Private ownership can be more appropriate than facilitator follow-up.

DEBRIEF QUESTIONS

01 What will you most need to remember when work becomes busy?

02 What obstacle deserves a practical response now?

03 How can the note be supportive rather than accusatory?

04 What evidence will help your future self judge progress fairly?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A participant writes a reminder to ask one clarifying question before solving a colleague's problem and schedules a private calendar prompt three weeks later.

A NEXT-STEP EXPERIMENT

Read the note on the chosen date and record what you learned, whether or not the action occurred.

My conclusion from this activity

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

Research basis: R04 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: M01, X22

M

Grounding and guided imagery

ASSESS / ACTIVATE

Offer optional attention practices and realistic rehearsal, not treatment or promises of healing.

05 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.

Choose an attention practice safely

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This orientation helps the coach offer a brief attention practice without implying that it is necessary, therapeutic or suitable for everyone. The client remains in control of participation, posture, eye position and stopping. An external-focus alternative is always available.

FACILITATION SEQUENCE

1. Explain the purpose as a short opportunity to settle attention before reflection, with no required feeling or outcome.
2. Ask whether the client would prefer quiet, an ordinary pause, external observation or no exercise.
3. Agree a comfortable seated or standing position, eyes open or closed by choice, and normal unforced breathing.
4. Explain that they may stop, move, look around or speak at any time; do not use the practice while driving or operating equipment.
5. Afterwards, ask what they noticed and whether this approach is useful to retain, adapt or avoid.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Stop if discomfort, panic, disorientation or distress occurs. Reorient to the room and seek appropriate support where needed; do not intensify the exercise.

Choose an attention practice safely

ASSESS / ACTIVATE • ABOUT 10 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: _____

What I have noticed

Context and demands

Appropriate support

Next step / earlier-help signal

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

Choose an attention practice safely

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Not feeling calmer is not a failure.

A brief practice is not a treatment and should not be used to manage serious distress without appropriate support.

The client's preference determines whether it is repeated.

DEBRIEF QUESTIONS

01 What made the invitation feel genuinely optional?

02 What helped you remain in control of the experience?

03 What did you notice without judging it as good or bad?

04 Would a different way of preparing for coaching suit you better?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client finds eyes-closed imagery uncomfortable and chooses to look at objects in the room for a minute before beginning the coaching conversation.

A NEXT-STEP EXPERIMENT

Choose one comfortable preparation method for the next session and review whether it helps.

My conclusion from this activity

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

Research basis: R13 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: MD02, MD07, P08

Choose an attention practice safely

Read or adapt the text below within the agreed purpose and professional boundaries.

You do not need to relax or reach a particular state. This is simply an optional pause before we begin. You may keep your eyes open, change position or stop at any time. Let your breathing remain ordinary. You could notice the chair or floor supporting you, or choose an object in the room and observe its shape. There is no need to search inside yourself. Take the time that is comfortable. When you are ready, look around and tell me whether you would like to begin, pause longer or do something different.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A brief pause beside falling water

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original water-image practice offers a short external scene as an optional focus for attention. The image does not wash away emotions or promise healing. A client who dislikes water imagery can use an ordinary sound or a visible object instead.

FACILITATION SEQUENCE

1. Use the safety invitation in ACE-M01 and confirm that a water image is comfortable.
2. Read the short script slowly, allowing approximately 60–90 seconds including pauses rather than forcing an exact duration.
3. Keep the voice natural and avoid commands about how the person must feel.
4. Invite the client to return attention to the room and move as they wish.
5. Capture the experience briefly and decide whether to use, adapt or omit the practice in future.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

No hypnosis, breath holding or implied healing is used; stop and reorient if uncomfortable.

A brief pause beside falling water

ASSESS / ACTIVATE • ABOUT 10 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: _____

Practice choice

Attention before, in my words

What I noticed

Comfort or discomfort

Attention afterwards

Preference for future use

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

A brief pause beside falling water

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The experience is subjective and no calmness score is required.

A wandering mind is ordinary and does not indicate failure.

A neutral or unhelpful response is a valid reason not to repeat the practice.

DEBRIEF QUESTIONS

01 What part of the scene was easy or difficult to imagine?

02 Where did your attention go when it wandered?

03 Was the practice useful, neutral or unhelpful today?

04 What would you change about it?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader uses the sound-image for a brief transition between meetings, then notes that a simple silent pause would work just as well on another day.

A NEXT-STEP EXPERIMENT

Try only the version you find comfortable, at a safe time, and observe its usefulness.

My conclusion from this activity

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

Research basis: R13 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: MD01, MD03, P08

A brief pause beside falling water

Read or adapt the text below within the agreed purpose and professional boundaries.

With your eyes open or closed as you choose, imagine that you are standing at a comfortable distance from a small fall of water. You are on firm ground. You do not need to approach it. Notice the idea of a steady sound, or simply notice an ordinary sound in this room. [Pause 10 seconds.] There is nothing you have to remove from your mind. Thoughts may be present while the sound remains in the background. [Pause 15 seconds.] Notice the support beneath your feet or your seat. Let your breathing remain unforced. [Pause 10 seconds.] Now allow the image to fade. Look around the room, notice where you are and move in any way that feels comfortable. Take a moment to decide what you would like to bring into our conversation.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

Pause at the shoreline

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original guided scene uses a shoreline to practise noticing movement without having to follow every thought. It is an attention exercise, not an instruction to empty the mind. The client can use an actual room object instead of imagery at any point.

FACILITATION SEQUENCE

1. Confirm consent, comfort with the scene and a preference for eyes open or closed.
2. Read the script in a natural voice, leaving the stated quiet periods; allow around three minutes in total.
3. Avoid interpreting the client's posture or silence as evidence of relaxation.
4. At the end, reorient to the actual room before moving into discussion.
5. Ask the client to record one observation and whether the practice supported the intended transition.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Avoid water imagery for a client who finds it distressing; offer an external-focus or no-exercise alternative.

Pause at the shoreline

ASSESS / ACTIVATE • ABOUT 10 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: _____

Chosen focus

What drew my attention

What I allowed to remain

Room-based grounding cue

Observation afterwards

Usefulness for today

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

Pause at the shoreline

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Imagery vividness is not a measure of skill or benefit.

The practice may be useful as a transition but does not establish improved executive performance.

Do not infer meaning from the details of the imagined scene.

DEBRIEF QUESTIONS

01 What did you notice about attention coming and going?

02 Was it helpful to leave thoughts present rather than push them away?

03 What real-world cue helped you return to the room?

04 How could this experience inform a brief pause during work?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client notices that she can allow a planning thought to remain without immediately acting on it, then chooses to write the concern down before the next meeting.

A NEXT-STEP EXPERIMENT

Use a brief chosen pause before one non-urgent response and notice whether it supports a more considered decision.

My conclusion from this activity

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

Research basis: R13 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: MD01, MD04, P08

Pause at the shoreline

Read or adapt the text below within the agreed purpose and professional boundaries.

Imagine a place beside the sea where you would feel comfortable observing from firm ground. You may be seated well away from the water. Or keep your eyes open and choose a quiet object in the room instead. Notice a shape, a colour or a sound without needing to make the scene detailed. [Pause 20 seconds.] In the imagined distance, the water moves towards the shore and away again. You do not need to match your breathing to it. Your breathing can remain ordinary. [Pause 25 seconds.] A thought may arrive about what happened earlier or what you need to do later. You can notice that a thought is present without solving it during this pause. [Pause 25 seconds.] If the scene is not useful, return to the contact between your feet and the floor, or look at a familiar object. You remain free to move or stop. [Pause 20 seconds.] Consider the question you would like to bring to the coaching conversation. You do not need an answer yet. [Pause 15 seconds.] Let the scene fade. Look around, notice the room and take the time you need before speaking.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

Observe the current without entering it

ASSESS / ACTIVATE • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This longer original river metaphor supports a distinction between noticing pressure and immediately responding to it. The client remains on a stable bank rather than being carried by a river. The practice is optional and is not a treatment for anxiety or other health conditions.

FACILITATION SEQUENCE

1. Confirm consent and explain the seven-minute structure, including quiet intervals and freedom to stop.
2. Read one script segment at the start of each minute, leaving the remaining time quiet unless the client asks otherwise.
3. During quiet intervals, remain attentive without imposing interpretation or insisting on silence.
4. In the final minute, invite orientation to the room and a deliberate choice about the next conversation.
5. Debrief the metaphor as a reflection aid and identify any practical implication separately from the experience itself.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Do not use imagery to encourage endurance of harmful conditions. Stop if the client becomes uncomfortable or disconnected from the room.

Observe the current without entering it

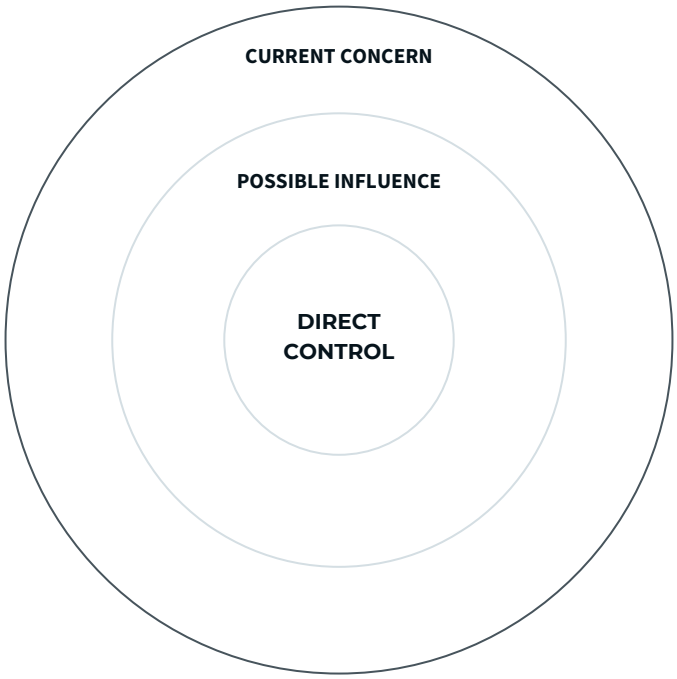
ASSESS / ACTIVATE • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

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

Observe the current without entering it

ASSESS / ACTIVATE • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Observing pressure does not remove its practical causes.

The metaphor should lead back to realistic choices and support.

Do not use a calm appearance as evidence that a serious problem is resolved.

DEBRIEF QUESTIONS

01 What did the distinction between observing and entering the current mean to you?

02 Which pressure still requires action rather than simply acceptance?

03 What choice became clearer during the pause?

04 What would make the practice more comfortable or useful?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive notices an urge to answer every message immediately and chooses to clarify the genuine escalation threshold with the team rather than simply trying to tolerate more pressure.

A NEXT-STEP EXPERIMENT

Pause before one non-urgent demand, then decide whether to act, schedule, delegate or clarify it.

My conclusion from this activity

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

Research basis: R13 R14 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: MD01, MD05, P08

Observe the current without entering it

Read or adapt the text below within the agreed purpose and professional boundaries.

MINUTE 1 — ARRIVE. Notice the room and the support beneath you. You may keep your eyes open. Imagine a river only if that image is comfortable. You are observing from a secure place on the bank, not in the water. Let the remaining minute be quiet, or look at a real object instead.

MINUTE 2 — OBSERVE. In the imagined river, water is moving at its own pace. Notice that movement without needing to control it. Your body is here in this room. Let your breathing stay ordinary.

MINUTE 3 — NAME. A current demand may come to mind. You can name it briefly: a deadline, a conversation, an uncertainty. There is no need to solve it during this minute. You can write it down later.

MINUTE 4 — DISTINGUISH. Some parts of the situation are outside your immediate control. Other parts involve a choice you can make, a question you can ask or support you can seek. You do not need to decide all of that now.

MINUTE 5 — ALLOW SPACE. Notice whether there is an urge to act immediately. You can acknowledge the urge while remaining in the room. Where a matter is not urgent, a pause may be available. Where it is urgent, appropriate action can follow this exercise.

MINUTE 6 — CHOOSE A QUESTION. Consider one useful question: What needs my action, what needs agreement, and what can wait? Keep only the part of that question that is relevant to you.

MINUTE 7 — RETURN. Let the river image fade. Look around and notice a few ordinary details of the room. Move your hands or feet as you choose. We can now talk, take another ordinary pause or stop the exercise. You decide what is useful.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A restorative pause and a realistic next step

ASSESS / ACTIVATE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This twelve-minute original practice alternates optional gentle river imagery with external grounding and practical reflection. The title deliberately avoids a claim of healing. Its purpose is to create space for attention and a chosen next step, not to induce a particular state or process trauma.

FACILITATION SEQUENCE

1. Use the orientation in ACE-M01 and agree whether twelve minutes of guided and quiet time is comfortable.
2. Read one numbered segment each minute; the remainder of each minute is optional quiet time, not compulsory stillness.
3. Offer external observation instead of imagery throughout and check in if the client appears uncomfortable.
4. Use the final two minutes to return attention fully to the room and identify a practical choice.
5. Debrief the experience without analysing symbols or promising continuing benefits.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Not a healthcare intervention. Avoid trauma-processing, breath manipulation, subliminal suggestions or any promise of healing.

A restorative pause and a realistic next step

ASSESS / ACTIVATE • ABOUT 20 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: _____

Practice preference

Supportive detail I noticed

What I do not need to solve now

Need or support to acknowledge

Realistic next step

Keep, adapt or avoid

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

A restorative pause and a realistic next step

ASSESS / ACTIVATE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A long practice is not inherently more effective than a short one.

The client may stop at any stage and still have used the activity appropriately.

A supportive experience should be distinguished from evidence of clinical or lasting change.

DEBRIEF QUESTIONS

01 What part of the pause was genuinely supportive?

02 What did you prefer to keep outside the exercise?

03 What practical need deserves attention after the pause?

04 Would a shorter or different preparation method suit you better?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client finds the quiet intervals helpful but chooses a four-minute version for future sessions and identifies a practical need to reduce meeting overload.

A NEXT-STEP EXPERIMENT

Choose one realistic support action after the session; repeat only the parts of the practice that were comfortable.

My conclusion from this activity

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

Research basis: R13 R01 R10 • Conceptual support; this original activity is not independently validated.

Inventory references: MD01, MD06, P08

A restorative pause and a realistic next step

Read or adapt the text below within the agreed purpose and professional boundaries.

1 — Begin by noticing where you are. You are free to keep your eyes open, move, speak or stop. Let the first minute be an ordinary arrival, with no demand to relax.

2 — Notice a point of physical support: the chair, the floor or another comfortable contact. Or choose a visible object and observe its shape. There is no correct sensation to find.

3 — If you wish, imagine a slow river viewed from a place you consider comfortable. You are not entering the water. A room-based focus is equally suitable.

4 — Notice one ordinary detail in the scene or room: a line, a colour, a sound. Let that be enough. You do not have to build a vivid image.

5 — Thoughts about work or life may be present. You do not need to push them away. Notice that thinking is happening, and return to a chosen detail when you wish.

6 — Consider whether there is anything you are trying to solve in this pause that can safely wait until the conversation. If something needs immediate attention, you can stop and attend to it.

7 — Notice what support is already present, however modest: a practical resource, a person, a skill or the time set aside for this conversation. You do not need to feel grateful or positive.

8 — Consider one condition that would help you function more sustainably. It might involve clarity, a boundary, rest, connection or practical assistance. Choose your own words.

9 — You do not have to meet that need alone. Notice whether a question, request or professional support would be useful. No commitment is required during this minute.

10 — Consider one small next step that fits your circumstances. It may be an action, a conversation, a deliberate pause or a decision to gather more information.

11 — Let any imagined scene fade. Look around the actual room and notice several ordinary details. Move as you wish and allow your attention to return fully to the present setting.

12 — Take this final minute in the way that is useful to you. We can talk about what you noticed, begin the planned coaching topic or choose a different direction. You decide what to share.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

N

Practice forms and communication

ALIGN / AGREE / ASSURE

Support the coaching relationship with clear, proportionate administration.

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.

A clear invitation to an introductory coaching conversation

ALIGN / AGREE / ASSURE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This voucher-style invitation provides a transparent way to offer an introductory conversation. It states the purpose, duration, eligibility and booking route without implying guaranteed outcomes or using pressure. It is a practice communication template, not a transferable financial instrument.

FACILITATION SEQUENCE

1. Define the purpose and duration of the introductory conversation and whether there is any charge.
2. Complete the recipient, provider, booking route, validity period and any genuine eligibility conditions.
3. State what the conversation includes and does not include, including that there is no obligation to continue.
4. Review the wording for accuracy, accessibility and any organisational approval requirements.
5. After the conversation, record whether the person wishes to explore coaching, seek another service or take no further action.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Check local consumer, advertising and organisational requirements before commercial use.

A clear invitation to an introductory coaching conversation

ALIGN / AGREE / ASSURE • ABOUT 20 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: _____

Recipient or audience

Provider and contact

Purpose and duration

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

A clear invitation to an introductory coaching conversation

ALIGN / AGREE / ASSURE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

The invitation is not evidence that coaching is appropriate for every recipient.

A useful introductory outcome can be referral or no further engagement.

Only record the minimum contact information needed.

DEBRIEF QUESTIONS

01 Is the offer understandable without additional explanation?

02 Could any wording imply a result you cannot promise?

03 Is declining further coaching genuinely easy?

04 What information does the recipient need before booking?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

HR Delivery offers a 30-minute introductory conversation to discuss goals, coaching boundaries and fit, with no obligation to purchase a programme.

A NEXT-STEP EXPERIMENT

Test the wording with a colleague unfamiliar with the offer and correct any ambiguity.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W12, FW02, FA04, SP13

A clear invitation to an introductory coaching conversation

Read or adapt the text below within the agreed purpose and professional boundaries.

INTRODUCTORY COACHING CONVERSATION

For: [recipient or eligible audience]

Provided by: HR Delivery / [named coach]

Duration and format: [minutes; online or in person]

Purpose: A conversation about your objectives, how coaching works and whether this service is a suitable next step.

Fee: [state clearly, including “no charge” where accurate]

Booking: [contact or approved booking link]

Valid until: [date, if applicable]

Conditions: [only genuine, clearly stated conditions]

There is no obligation to continue. This conversation is not a clinical assessment, legal consultation or guarantee of a particular outcome.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

Build a referral network through genuine usefulness

ALIGN / AGREE / ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This practice-development map organises up to fifty potential professional connections without treating people as sales targets. It focuses on relevance, trust, mutual usefulness and consent. The number fifty is a capacity for the register, not a required achievement.

FACILITATION SEQUENCE

1. Define the coaching work you are qualified to provide and the people it is appropriate for.
2. Identify existing and potential connections in five groups: trusted peers, complementary professionals, organisational contacts, professional communities and former contacts who have consented to further communication.
3. For each, record the relationship context, mutual relevance and a respectful next step.
4. Choose a few relationships to strengthen through useful conversation rather than sending a mass request.
5. Review outcomes, preferences and conflicts of interest; remove people who do not wish to be contacted.

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

Protect client confidentiality and disclose any relevant financial interests in referrals.

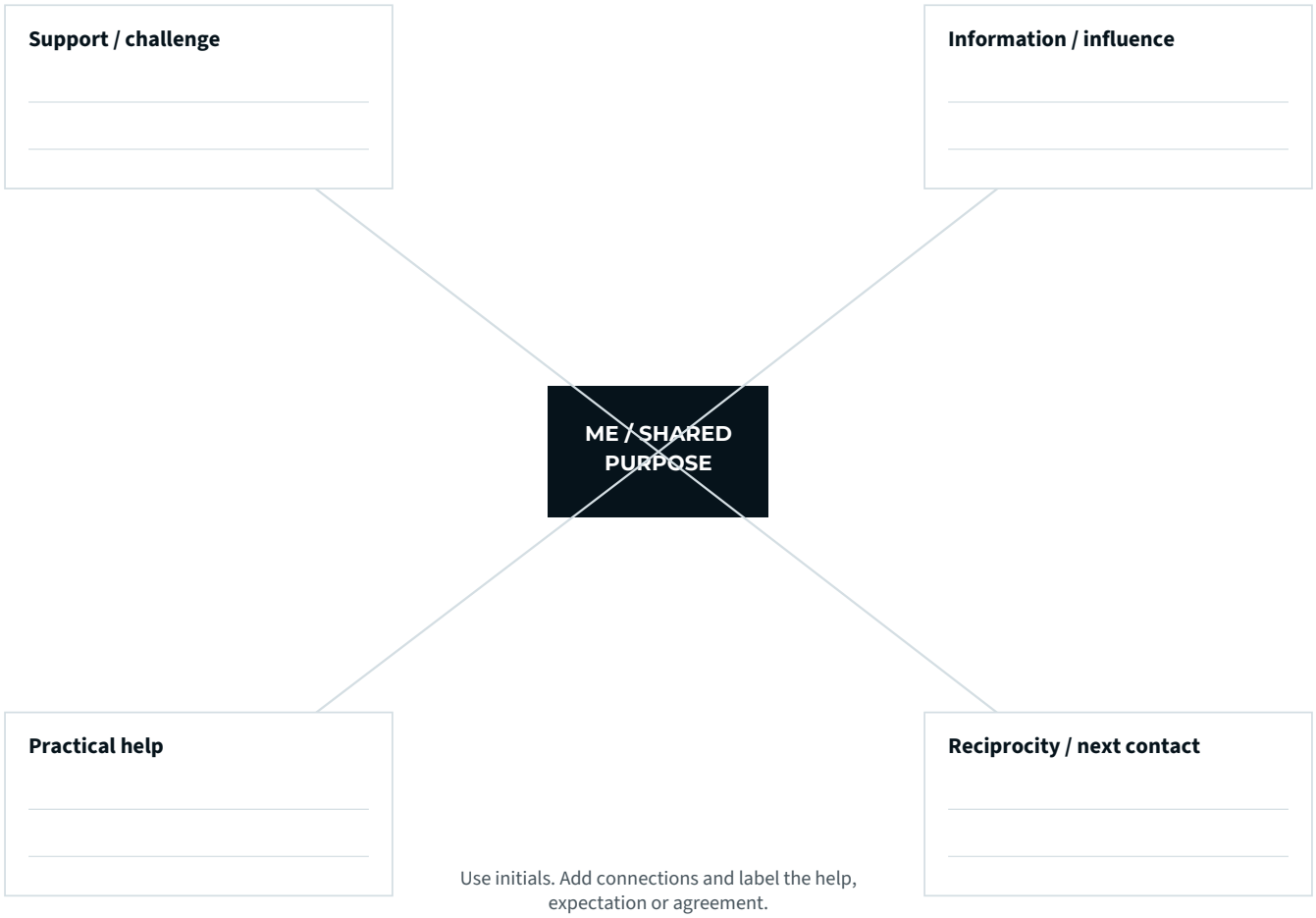
Build a referral network through genuine usefulness

ALIGN / AGREE / ASSURE • 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: _____



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

Build a referral network through genuine usefulness

ALIGN / AGREE / ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A referral network should not be judged only by volume.

Referral fees or incentives require transparent handling and appropriate review.

Do not infer consent from a public profile or a past client relationship.

DEBRIEF QUESTIONS

01 Why would this connection be useful to both people?

02 What competence or scope boundary should be clear?

03 Where could a referral create a conflict of interest?

04 What would respectful non-response or refusal look like?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A coach develops a reciprocal relationship with an occupational-health professional, clearly distinguishing coaching from clinical care and avoiding promises of mutual referrals.

A NEXT-STEP EXPERIMENT

Have one useful, non-pressured professional conversation and record the agreed follow-up.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W13, FE06, FA05

A transparent coaching invoice

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This invoice template supports clear administration by separating the service description, fee, applicable tax treatment and payment details. It is a document structure, not accounting or tax advice. The provider must verify required fields and treatment for the relevant jurisdiction.

FACILITATION SEQUENCE

1. Confirm the contracting parties, authorised billing recipient and agreed service terms.
2. Complete a unique invoice number, issue date, service period and accurate description.
3. Show quantity, rate, subtotal, any verified tax and the total due; do not assume that a particular tax rate applies.
4. Add payment instructions, due date and a contact for queries, checking bank details independently.
5. Reconcile the invoice to the agreement and record payment status securely.

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

Obtain accounting or legal advice on required invoice fields, taxes and cross-border transactions.

A transparent coaching invoice

ALIGN / AGREE / ASSURE • 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: _____

Provider / authorised recipient

Reference / date / currency

Service / invoice reference	Quantity	Rate	Amount

Verified tax treatment / total / balance (as applicable)

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

A transparent coaching invoice

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

An invoice records a payment request, not proof of payment.

The service description should be sufficient for billing without exposing confidential session content.

Tax and currency treatment must be verified for the actual transaction.

DEBRIEF QUESTIONS

01 Can the recipient understand exactly what is being charged?

02 Does the invoice match the agreed service and rate?

03 Which fields or tax treatment need professional verification?

04 How will a payment query be resolved without sharing coaching content?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An invoice describes “Executive coaching sessions, agreed programme, September” rather than disclosing the client’s personal development topics.

A NEXT-STEP EXPERIMENT

Check the invoice against the signed commercial agreement before issue.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W14, FA06, SP14

A receipt that confirms what was received

ALIGN / AGREE / ASSURE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This receipt template provides a concise record of payment received. It is distinct from an invoice and should identify the transaction it settles. It avoids recording unnecessary personal or coaching information.

FACILITATION SEQUENCE

1. Confirm that the payment has actually been received and reconciled.
2. Enter the receipt number, date, payer, amount and currency.
3. Reference the invoice or agreed service and describe the payment method without exposing full financial credentials.
4. Record any remaining balance or clearly state that the referenced amount is settled.
5. Send the receipt to the authorised recipient and retain it according to the agreed records policy.

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 local financial-record requirements and use secure, verified payment information.

A receipt that confirms what was received

ALIGN / AGREE / ASSURE • ABOUT 20 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: _____

Provider / authorised recipient

Reference / date / currency

Payment reference	Date	Method	Amount received

Verified tax treatment / total / balance (as applicable)

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

A receipt that confirms what was received

ALIGN / AGREE / ASSURE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A receipt must reflect an actual received payment.

A partial payment should not be described as full settlement.

Financial records and coaching notes should be kept appropriately separate.

DEBRIEF QUESTIONS

01 What evidence confirms that the payment was received?

02 Is the receipt clearly linked to the correct invoice?

03 Could any unnecessary financial or coaching information be removed?

04 Who is authorised to receive and retain it?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A receipt confirms the amount and invoice reference while omitting session topics and masking unnecessary transaction details.

A NEXT-STEP EXPERIMENT

Reconcile one sample receipt to its invoice and payment record before using the template routinely.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W16, FA08, SP15

A welcome letter that prepares the client

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This welcome letter makes the first stage of coaching clear and reassuring. It explains practical arrangements, preparation, confidentiality boundaries and how the client can raise questions. It should match the actual coaching agreement rather than introduce new terms casually.

FACILITATION SEQUENCE

1. Complete the coach, client, programme purpose and first-session details.
2. Explain what preparation is useful and make clear that sensitive written disclosure is optional.
3. Summarise confidentiality by referring to the agreed terms, including any sponsor arrangements.
4. State contact, cancellation and accessibility arrangements accurately.
5. Invite questions and ask the client to confirm that the arrangements are understood.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Use only approved secure contact and meeting arrangements.

A welcome letter that prepares the client

ALIGN / AGREE / ASSURE • 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: _____

Client and coach

Purpose and first appointment

Optional preparation

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

A welcome letter that prepares the client

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A warm welcome should not promise unconditional confidentiality where exceptions apply.

The letter supports but does not replace informed contracting.

Accessibility needs should be invited without requiring diagnosis disclosure.

DEBRIEF QUESTIONS

01 What uncertainty might a new client still have after reading this?

02 Does the letter match the actual agreement?

03 Is the preparation proportionate and optional where appropriate?

04 How can the client raise a concern without embarrassment?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client receives clear joining details, a short optional reflection prompt and a direct invitation to discuss access preferences before the first meeting.

A NEXT-STEP EXPERIMENT

Review the letter from a first-time coaching client's perspective and remove unexplained jargon.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W19, FA09, SP16

A welcome letter that prepares the client

Read or adapt the text below within the agreed purpose and professional boundaries.

Dear [client name],

Welcome to your coaching work with HR Delivery. Our agreed purpose is [purpose in the client's words]. Our first meeting is [date, time, time zone, location or secure joining details].

Before we meet, you may find it useful to note one situation you would like to work on, why it matters and what would make the conversation useful. You do not need to send private background information in advance.

We will confirm our working agreement, including confidentiality, any sponsor communication, records and the limits of coaching. Please refer to [agreement reference] for the agreed terms.

For scheduling questions, use [contact]. Our agreed cancellation arrangements are [accurate summary]. Please let me know about any access or communication preference that would help you participate comfortably.

You are welcome to ask questions about the process or raise a concern at any stage.

With best wishes,

[named coach]

HR Delivery

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A proportionate client information record

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This intake record captures only information needed to organise and provide coaching responsibly. It separates contact and contracting details from sensitive reflective notes. The client should understand why information is requested and how it will be used.

FACILITATION SEQUENCE

1. Identify the minimum information needed for the engagement and remove fields with no clear purpose.
2. Record preferred name, contact route, time zone, role context and authorised sponsor or billing contact where relevant.
3. Invite access and communication preferences without requiring unnecessary health details.
4. Record agreement dates, permissions, emergency or safeguarding arrangements where appropriate and the records-policy reference.
5. Ask the client to check accuracy and explain how they can request corrections.

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

Verify applicable privacy and records requirements; do not treat this template as jurisdiction-specific compliance advice.

A proportionate client information record

ALIGN / AGREE / ASSURE • 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: _____

Preferred name and contact

Role context and time zone

Authorised sponsor or billing contact

Access and communication preferences

Agreements and permissions

Records policy and correction route

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

A proportionate client information record

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Completing a form does not itself establish informed consent.

A sponsor contact is not automatically authorised to receive session information.

Data minimisation should be designed before collection.

DEBRIEF QUESTIONS

01 Why is each field necessary for this engagement?

02 What information could be kept out of the administrative record?

03 Who genuinely needs access to this record?

04 How will the client correct or update it?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A coach records that a client prefers written agendas and captions without asking for a medical explanation.

A NEXT-STEP EXPERIMENT

Audit the record and remove one field that lacks a clear purpose.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FA02, SP12

An explicit newsletter choice

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This sign-up template separates optional marketing communication from participation in coaching or a workshop. It explains what will be sent, by whom and how to stop it. The design avoids pre-ticked consent and unnecessary personal data.

FACILITATION SEQUENCE

1. Define the newsletter topic, likely frequency and sender accurately.
2. Collect only the contact information needed and provide a concise privacy-information reference.
3. Present an unticked affirmative choice, separate from service terms or event attendance.
4. Record the consent wording, date and source in an approved system.
5. Provide a straightforward withdrawal route and honour preferences promptly under the applicable requirements.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Have privacy and electronic-marketing requirements reviewed for the relevant jurisdictions.

An explicit newsletter choice

ALIGN / AGREE / ASSURE • 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: _____

Newsletter purpose and frequency

Sender and contact

Email or preferred delivery route

Unticked consent statement

Date, wording version and source

Withdrawal and privacy-information route

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 explicit newsletter choice

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A business card or event registration is not automatically permission for all future marketing.

Consent and other lawful requirements depend on the actual context and jurisdiction.

A clear preference record is more useful than a long contact list of uncertain origin.

DEBRIEF QUESTIONS

01 Can someone attend or receive coaching without subscribing?

02 Is the communication frequency stated honestly?

03 What evidence records the person's actual choice?

04 How easy is it to stop receiving messages?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A workshop form offers a separate optional choice to receive a monthly coaching-practice note, leaving attendance unaffected by the decision.

A NEXT-STEP EXPERIMENT

Test the sign-up and withdrawal process before inviting real subscribers.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FW04, FA07

An explicit newsletter choice

Read or adapt the text below within the agreed purpose and professional boundaries.

OPTIONAL HR DELIVERY COACHING PRACTICE NOTE

What you will receive: [accurate topic and likely frequency].

Email: [blank field]

[ ] I choose to receive this communication from HR Delivery. I understand that this is optional and that I can stop it using [withdrawal route].

Privacy information: [approved notice or contact].

For the provider’s record: consent date [ ], wording version [ ], source [ ].

Do not pre-tick the box or make coaching, event participation or another service conditional on this choice.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A workshop readiness and delivery checklist

ALIGN / AGREE / ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This checklist helps a coach or facilitator prepare the conditions for a useful workshop. It combines purpose, participant needs, logistics, safety and follow-through. It is not enough to have slides and a room; the session must connect with an organisational need and a feasible next step.

FACILITATION SEQUENCE

1. Confirm the purpose, audience, sponsor expectations and what the workshop is not intended to achieve.
2. Check participant information, access needs, group size, confidentiality and any power-sensitive topics.
3. Prepare the agenda, materials, timing, technology, room or online arrangements and a contingency plan.
4. Before delivery, confirm consent arrangements for recording, photographs or data collection; default to no recording unless agreed.
5. After delivery, collect proportionate feedback, confirm actions and review the facilitation process.

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 appropriate risk assessment for the actual venue and activities; avoid physical exercises without access and safety review.

A workshop readiness and delivery checklist

ALIGN / AGREE / ASSURE • 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: _____

Purpose and success evidence

Audience and access needs

Agenda and materials

Logistics and contingency

Consent and safety checks

Follow-through and review

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

A workshop readiness and delivery checklist

ALIGN / AGREE / ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A smooth event is not the same as a useful learning outcome.

Readiness includes participant conditions as well as facilitator preparation.

Feedback and action ownership should be designed before the event.

DEBRIEF QUESTIONS

01 What must participants be able to do after the session?

02 Which access or hierarchy issue could reduce participation?

03 What would you change if time or technology failed?

04 Who owns the follow-through after the facilitator leaves?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A facilitator provides a seated alternative, private response route and clear action owner before a mixed-seniority leadership workshop.

A NEXT-STEP EXPERIMENT

Run a short rehearsal and test the most important contingency before delivery.

My conclusion from this activity

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

Research basis: R12 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FW07

Workshop feedback that leads to improvement

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This original feedback form separates relevance, facilitation, participation conditions and intended application. It is not a validated evaluation instrument and should not be reduced to a single satisfaction score. Open comments identify what to retain and change.

FACILITATION SEQUENCE

1. Explain why feedback is being collected, whether it is anonymous and who will see it.
2. Ask participants to rate the six items from 1 strongly disagree to 5 strongly agree, with N/A available.
3. Collect two open responses: what was most useful and what should change.
4. Summarise item distributions and comments without identifying people in small groups.
5. Choose a specific improvement and, where agreed, follow up later on actual application rather than immediate satisfaction alone.

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

Protect anonymity honestly; do not promise it when names, handwriting or small-group context may identify respondents.

Workshop feedback that leads to improvement

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Rate each statement: 1 = strongly disagree; 2 = disagree; 3 = neither agree nor disagree; 4 = agree; 5 = strongly agree. Use N/A where you cannot judge. Add what was useful and what should change.

NO.	STATEMENT / QUESTION	RATING
WF01	The purpose of the session was clear.	
WF02	The content was relevant to my work.	
WF03	The explanations and instructions were understandable.	
WF04	I had a suitable way to participate.	
WF05	The activities helped me identify a practical next step.	
WF06	The session respected different perspectives and boundaries.	

What I notice / context behind my responses

One useful next step or question to discuss

Workshop feedback that leads to improvement

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Do not compute a total quality score or claim validated cut-offs.

Report the number of responses and missing items alongside any item summaries.

Immediate intention to apply is not evidence that application occurred.

DEBRIEF QUESTIONS

01 Which feedback concerns relevance rather than facilitation style?

02 What can the ratings not tell us about later application?

03 Could a small group make a comment identifiable?

04 What change will you make because of the feedback?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

Feedback shows that participants valued the topic but lacked enough practice time, so the next workshop reduces presentation content and adds a second rehearsal.

A NEXT-STEP EXPERIMENT

Make one documented design change and check its effect in the next delivery.

My conclusion from this activity

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

Research basis: R12 R22 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FW08

A year of useful coaching conversations

ALIGN / AGREE / ASSURE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This content-planning activity turns monthly coaching themes into practical questions, reflection prompts and small experiments. It supports newsletters, learning groups or client resources without claiming that social-media engagement is evidence of coaching impact. The companion content bank contains original text, not copied quotations.

FACILITATION SEQUENCE

1. Choose an audience and a clear educational purpose for the year.
2. Use the twelve monthly learning cards, adapting timing and language to the audience rather than assuming a universal calendar.
3. For each month, select four questions, four journal prompts and four grounded intention statements linked to actual activities.
4. Add a clear invitation to reflect or practise, avoiding clinical claims, guaranteed outcomes and invented client stories.
5. Review accessibility, attribution, confidentiality and whether the content leads to a useful conversation or 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

Do not publish client material without specific permission or imply that generic prompts replace individual assessment or professional care.

A year of useful coaching conversations

ALIGN / AGREE / ASSURE • 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: _____

Jan	**Feb**	**Mar**	**Apr**
May	**Jun**	**Jul**	**Aug**
Sep	**Oct**	**Nov**	**Dec**

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

A year of useful coaching conversations

ALIGN / AGREE / ASSURE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Published content is educational and does not create a coaching relationship by itself.

Original reflection lines are not quotations from named experts.

Topic coverage is not equivalent to supplying every commercial graphic format.

DEBRIEF QUESTIONS

01 What should this content help the reader do?

02 Which claim needs evidence or more cautious wording?

03 How can the material respect people who do not want coaching?

04 What would count as usefulness beyond likes or clicks?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

HR Delivery uses a monthly theme on boundaries to share one practical question, a rehearsal prompt and an invitation to consider a feasible request rather than a motivational slogan.

A NEXT-STEP EXPERIMENT

Pilot one week of content with a small relevant audience and ask what was useful or unclear.

My conclusion from this activity

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

Research basis: R01 R03 R19 • Conceptual support; this original activity is not independently validated.

Inventory references: SC01, SC02, SC03, SC04, SC05, SC06, SC07, SC08, SC09, SC10, SC11, SC12, N04

Explain the value and limits of coaching

ALIGN / AGREE / ASSURE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This communication canvas helps a coach describe what coaching offers without claiming it is the answer to every problem. It can support a one-page information sheet, introductory conversation or educational graphic. The message should distinguish the process, possible benefits and the client's role.

FACILITATION SEQUENCE

1. Define the audience and the decisions they need to make about coaching.
2. Explain the process in plain language: agree a purpose, explore evidence and perspectives, choose actions and review learning.
3. Describe possible areas of value cautiously, linking them to the person's goals rather than guaranteed outcomes.
4. State the limits, including when therapy, specialist advice, training or organisational action may be more appropriate.
5. Invite questions and provide a clear, non-pressured next step.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Avoid overstated credentials, guaranteed transformations and unsubstantiated health or performance claims.

Explain the value and limits of coaching

ALIGN / AGREE / ASSURE • 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: _____

Purpose / need

Behaviour / action

Evidence / effect

Review / learning

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

Explain the value and limits of coaching

ALIGN / AGREE / ASSURE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Coaching evidence at programme level does not validate every method or guarantee individual results.

A clear explanation includes both benefits and limits.

The client's agency is central to the relationship.

DEBRIEF QUESTIONS

01 What might a first-time client misunderstand about coaching?

02 Which benefit is a possibility rather than a promise?

03 What alternative service may be more appropriate in some cases?

04 How can the message support an informed choice rather than a sale?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An information sheet explains that coaching can support reflection and deliberate practice while clarifying that the coach does not make the executive's decisions or provide clinical treatment.

A NEXT-STEP EXPERIMENT

Ask someone unfamiliar with coaching to explain the offer back to you and correct misunderstandings.

My conclusion from this activity

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

Research basis: R01 R02 • Conceptual support; this original activity is not independently validated.

Inventory references: WH01, WH02, WH03, WH04, WH05, WH06, WH07, WH08, P09, IG06, BND01

Explain the value and limits of coaching

Read or adapt the text below within the agreed purpose and professional boundaries.

COACHING: A STRUCTURED SPACE TO THINK AND ACT

We begin with a purpose that matters to you. Together we examine the situation, question assumptions, consider options and choose practical experiments. We review what happens and adjust the approach.

Coaching may support clearer decisions, more deliberate leadership behaviour and useful learning. Results depend on your circumstances, the quality of the work and the conditions around you; no particular outcome is guaranteed.

You remain responsible for your choices. The coach contributes a disciplined process, challenge, reflection and support within an agreed professional scope.

Coaching is not a substitute for therapy, medical care, legal or financial advice, or action the organisation itself needs to take.

A first conversation can help you decide whether coaching is an appropriate next step.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A transparent coaching partnership charter

ALIGN / AGREE / ASSURE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This charter expresses twelve commitments in an original HR Delivery voice. It replaces idealised claims about how a coach always feels with observable professional commitments that can be discussed and reviewed. It is an orientation resource, not a substitute for the working agreement.

FACILITATION SEQUENCE

1. Read the twelve commitments with the client and explain how each will be enacted in this engagement.
2. Ask which commitment matters most and whether any expectation needs clarification.
3. Connect confidentiality, challenge and accountability to the actual agreement rather than vague assurances.
4. Invite the client to describe their own participation preferences and responsibilities.
5. Revisit the charter when the relationship needs adjustment or at a scheduled 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

Do not promise unlimited availability, unconditional secrecy or expertise beyond the coach's competence.

A transparent coaching partnership charter

ALIGN / AGREE / ASSURE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

01	We will agree a purpose that matters to you.
02	You remain the decision-maker in your own life and work.
03	We will be clear about confidentiality and its limits.
04	I will listen carefully and check my understanding.
05	I will offer challenge respectfully and explain what I have noticed.
06	We will distinguish evidence from assumptions.
07	We will recognise strengths without ignoring difficulties.
08	You may question an exercise, decline it or suggest another approach.
09	We will turn useful insight into realistic experiments.
10	We will review progress honestly, including what has not worked.
11	I will work within my competence and discuss other support when appropriate.
12	We will adjust or end the engagement when that is the right decision.

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

A transparent coaching partnership charter

ALIGN / AGREE / ASSURE • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A charter is credible only when reflected in behaviour.

Warmth does not remove professional boundaries or necessary challenge.

The client may question or revise expectations within the agreed scope.

DEBRIEF QUESTIONS

01 Which commitment would make the greatest difference to your experience of coaching?

02 What does useful challenge look like for you?

03 How will you tell the coach when the approach is not helping?

04 What responsibility do you want to take for the work?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client and coach agree that challenge should begin with an observation and a question, rather than a forceful interpretation presented as truth.

A NEXT-STEP EXPERIMENT

Use the charter at the next review to identify one thing to retain and one thing to adjust.

My conclusion from this activity

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

Research basis: R01 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: CH01, CH02, CH03, CH04, CH05, CH06, CH07, CH08, CH09, CH10, CH11, CH12, CH13, CH14, P09, BND01, CHG

Business-owner coaching

ALIGN / ASSESS / APPLY

Keep business evidence, owner development and professional-advice boundaries distinct.

08 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.

The owner's annual business direction plan

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This business-owner version separates the owner's aspirations from the evidence of what the business needs. It links a small number of annual outcomes with customer value, operational capacity and responsible governance. It is a coaching decision aid, not a financial forecast or business valuation.

FACILITATION SEQUENCE

1. Clarify the owner's ambition and the business purpose, including who benefits and what must be protected.
2. Review available evidence about customers, operations, people and financial capacity with appropriate advisers where needed.
3. Choose a small number of annual outcomes and define indicators, assumptions and boundaries for each.
4. Sequence the outcomes by dependencies and resources, identifying decisions that need specialist advice or governance approval.
5. Translate the first quarter into experiments and review points rather than treating the annual plan as fixed.

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 provide investment, tax or legal recommendations through this coaching worksheet.

The owner’s annual business direction plan

ALIGN / ASSESS / APPLY • ABOUT 60 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: _____

Jan	**Feb**	**Mar**	**Apr**
May	**Jun**	**Jul**	**Aug**
Sep	**Oct**	**Nov**	**Dec**

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

The owner’s annual business direction plan

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

An attractive target is not evidence that the business can achieve it.

Financial, legal and regulatory assumptions require appropriate professional review.

The plan should remain revisable as evidence changes.

DEBRIEF QUESTIONS

01 Where do your personal preferences differ from what the business currently needs?

02 Which outcome has the strongest evidence of customer value?

03 What assumption could make the plan unworkable?

04 What must be protected while pursuing growth?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner prioritises reliable delivery and a stronger management layer before opening another location, after recognising that expansion would amplify existing capacity problems.

A NEXT-STEP EXPERIMENT

Test one first-quarter assumption before making an irreversible commitment.

My conclusion from this activity

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

Research basis: R03 R21 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: Q01, Q06, Q07

The business history and turning-point map

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This business-history map examines how the enterprise developed, which choices shaped it and what patterns may still influence the owner. It distinguishes business evidence from the founder's personal story while recognising that both can matter.

FACILITATION SEQUENCE

1. Draw a timeline from the business's beginning to the present and mark major decisions, customer shifts, people changes and external events.
2. For each turning point, record what was known then, what decision was made and what happened afterwards.
3. Identify recurring strengths, constraints and assumptions that persisted after conditions changed.
4. Ask which founder-era habits remain useful and which now limit the organisation.
5. Choose one historical lesson that should influence a current decision.

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 confidential commercial and personal information out of group versions unless authorised.

The business history and turning-point map

ALIGN / ASSESS / APPLY • 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: _____

Earlier / context

Recent evidence



Turning point

Now / implication

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

The business history and turning-point map

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

Hindsight can make past decisions appear more obvious than they were.

A successful outcome does not prove that every part of the decision was sound.

The map should distinguish business patterns from personal identity judgements.

DEBRIEF QUESTIONS

01 Which past success has become an unquestioned rule?

02 What external condition contributed to the result?

03 What did the business learn that is not yet embedded in a process?

04 Which founder habit may now need to change?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner recognises that personally approving every exception helped an early-stage business but now delays a larger team, prompting clearer delegated authority.

A NEXT-STEP EXPERIMENT

Use one historical lesson to revise a current operating or governance decision.

My conclusion from this activity

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

Research basis: R17 R19 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: Q08

Business SWOT with a decision attached

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This business-specific SWOT examines internal capabilities and limitations alongside external opportunities and threats. It requires evidence and a decision consequence for each entry. The goal is not a complete list but a better strategic choice.

FACILITATION SEQUENCE

1. Define the business decision and planning horizon before filling the four quadrants.
2. List internal strengths and weaknesses with evidence from customers, delivery, people or verified financial information.
3. List external opportunities and threats, distinguishing observed changes from assumptions.
4. Select the few interactions that matter most, such as a strength that could address an opportunity or a weakness that increases a threat.
5. Choose an action, an assumption to test and any specialist advice needed.

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 qualified advisers for financial, legal, regulatory and investment judgements.

Business SWOT with a decision attached

ALIGN / ASSESS / APPLY • 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

Weaknesses — internal

Opportunities — external

Threats — external

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

Business SWOT with a decision attached

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

SWOT is a structuring device, not a strategy by itself.

Financial and market assumptions require verification.

A long list can conceal the few issues that materially affect the decision.

DEBRIEF QUESTIONS

01 Which item is genuinely internal and which is external?

02 What evidence makes this more than the owner's opinion?

03 Which interaction between quadrants matters most?

04 What decision should change because of this analysis?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A specialist service business uses a strong client relationship base to test a new service, while addressing dependence on one delivery expert before wider expansion.

A NEXT-STEP EXPERIMENT

Test one opportunity with proportionate evidence before scaling the commitment.

My conclusion from this activity

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

Research basis: R03 R21 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: Q09

Turn a business strength into a repeatable capability

ALIGN / ASSESS / APPLY • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This activity distinguishes an apparent business strength from a capability that can be delivered reliably without depending entirely on the owner. It helps identify the process, people and conditions behind good outcomes.

FACILITATION SEQUENCE

1. Choose a business outcome that customers or other stakeholders consistently value.
2. Identify specific evidence of the strength and the people, processes and resources that create it.
3. Test whether the strength is repeatable across situations or depends on one person's exceptional effort.
4. Choose how to protect, document, develop or scale the capability without weakening quality.
5. Define an experiment and the evidence that would show whether the capability is more reliable.

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 infer commercial value or valuation from a qualitative strength description.

Turn a business strength into a repeatable capability

ALIGN / ASSESS / APPLY • 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: _____

Valued business outcome

Evidence of strength

People and process enablers

Dependency or fragility

Capability-building action

Reliability evidence

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

Turn a business strength into a repeatable capability

ALIGN / ASSESS / APPLY • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A founder's skill can be an asset and a dependency at the same time.

Customer praise is useful evidence but should be considered alongside consistency and outcomes.

Scaling a strength may require a different process, not simply more effort.

DEBRIEF QUESTIONS

01 What makes this a business capability rather than a personal talent?

02 Where is the strength vulnerable to absence or growth?

03 What must remain consistent as the business expands?

04 How can the capability be shared without losing its quality?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner turns excellent personal client onboarding into a documented process with trained colleagues and a quality review, reducing dependence on her availability.

A NEXT-STEP EXPERIMENT

Test the capability with another suitably supported person and review the result.

My conclusion from this activity

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

Research basis: R08 R03 R14 • Conceptual support; this original activity is not independently validated.

Inventory references: Q04

Manage a business weakness proportionately

ALIGN / ASSESS / APPLY • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This business-focused development-gap exercise assesses a limitation by its consequences, causes and available responses. It avoids treating every weakness as something the owner must personally master. Options include development, process redesign, recruitment, partnership or specialist advice.

FACILITATION SEQUENCE

1. Describe one business limitation through observable effects rather than a broad label.
2. Assess where it affects customers, delivery, people or governance and how urgent the consequences are.
3. Identify likely causes and the evidence still needed before choosing a response.
4. Compare develop, redesign, recruit, partner, outsource or accept with safeguards, considering cost and dependency.
5. Choose a proportionate next step with an owner, review point and risk 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

Escalate legal, financial, safety and regulatory issues to appropriately qualified professionals.

Manage a business weakness proportionately

ALIGN / ASSESS / APPLY • 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: _____

Develop

Redesign / obtain help

Accept with safeguards

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 business weakness proportionately

ALIGN / ASSESS / APPLY • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A weakness in one context may not matter in another.

Outsourcing transfers work but does not automatically remove accountability or dependency.

The response should match the consequence and business stage.

DEBRIEF QUESTIONS

01 What problem are you trying to solve rather than what label are you applying?

02 Which cause is supported by evidence?

03 What should the owner learn and what should the business obtain elsewhere?

04 What risk remains after the proposed response?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A small business owner obtains qualified accounting support and improves source records rather than attempting to become the organisation's tax expert.

A NEXT-STEP EXPERIMENT

Take one evidence-gathering or specialist-support step before committing to a major solution.

My conclusion from this activity

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

Research basis: R03 R14 R01 • Conceptual support; this original activity is not independently validated.

Inventory references: Q11

Turn a business vision into a tested route

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This route map connects a preferred business future with the assumptions and capabilities needed to reach it. It is especially useful when the owner has a persuasive vision but an unclear path. The first output is a sequence of tests, not a promise of success.

FACILITATION SEQUENCE

1. Describe the future business in terms of customers served, value provided, operating conditions and the owner's role.
2. Work backwards to identify the capabilities and milestones that would need to exist.
3. List the assumptions about demand, capacity, people and resources on which the route depends.
4. Choose the earliest useful test and define what would count as supportive or disconfirming evidence.
5. Agree the next decision gate and what advice or governance approval is required 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

Obtain appropriate advice before financial, legal or regulatory commitments.

Turn a business vision into a tested route

ALIGN / ASSESS / APPLY • 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: _____

Starting point	→	Next useful step	→	Evidence / milestone	→	Review / decision

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

Turn a business vision into a tested route

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

A route map is a hypothesis about development, not a forecast.

Disconfirming evidence can prevent expensive commitment.

A business milestone should not depend on the owner sustaining an unrealistic workload.

DEBRIEF QUESTIONS

01 Which part of the vision is a preference and which is supported by demand?

02 What capability must exist before the next milestone?

03 What evidence would make you change direction?

04 What is the smallest responsible test of the route?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner pilots a new service with a small number of appropriate customers and defined delivery limits before hiring a full team around the idea.

A NEXT-STEP EXPERIMENT

Run the first bounded test and review the evidence before the next commitment.

My conclusion from this activity

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

Research basis: R03 R21 R04 • Conceptual support; this original activity is not independently validated.

Inventory references: Q10

A business-owner discovery conversation

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

This intake conversation distinguishes the owner as a person, the business as a system and the coaching engagement as a bounded service. It identifies the decision or development need while clarifying where specialist advice or organisational work is required.

FACILITATION SEQUENCE

1. Ask the owner to describe the business, their role and the reason for seeking coaching now.
2. Explore the current challenge through customer, operational, people and governance evidence without conducting an unauthorised audit.
3. Ask how the challenge affects the owner and what they would like to do differently.
4. Clarify stakeholders, decision authority, confidentiality, conflicts and any existing professional advisers.
5. Agree a coaching purpose, success evidence and the boundaries of what the coach will and will not provide.

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

Clarify conflicts of interest and do not give legal, tax, investment or clinical advice outside competence.

A business-owner discovery conversation

ALIGN / ASSESS / APPLY • ABOUT 60 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: _____

Business and owner role

Reason for coaching now

Current evidence and challenge

Personal development need

Stakeholders and advisers

Agreed scope and evidence

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

A business-owner discovery conversation

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

An owner's account is a starting perspective, not a verified business diagnosis.

Business and personal goals may conflict and should be made explicit.

A coach should not imply expertise in every aspect of running a business.

DEBRIEF QUESTIONS

01 Is the central issue a coaching need, a business-system problem or a specialist-advice need?

02 What evidence would help us understand it more accurately?

03 Who else has authority or a legitimate stake in the decision?

04 What would a useful engagement enable you to do?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner's request for confidence coaching reveals unclear partner decision rights, leading to a bounded coaching goal alongside a separate governance-advice conversation.

A NEXT-STEP EXPERIMENT

Agree one coaching outcome and one information or specialist-support step before choosing further exercises.

My conclusion from this activity

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

Research basis: R01 R18 • Conceptual support; this original activity is not independently validated.

Inventory references: Q17

Three perspectives on the business you want to build

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

PURPOSE AND INTRODUCTION

These three original business-vision exercises explore the future through customer experience, operating reality and the owner's role. They are alternatives, not three tests to score. Use one or compare all three to reveal tensions that a single optimistic vision might hide.

FACILITATION SEQUENCE

1. Choose a realistic future date and explain that the three scenes are imagined, not predictions.
2. Complete the customer scene: describe a specific customer experience and the evidence that would make it valuable.
3. Complete the operating-day scene: describe how work, decisions and delivery would function on an ordinary day.
4. Complete the owner-role scene: describe what the owner does, no longer does and must learn or delegate.
5. Compare the scenes, identify inconsistencies and choose one assumption to test or capability to develop.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Keep imagined customer quotations and financial outcomes clearly fictional; verify business assumptions with appropriate evidence and advice.

Three perspectives on the business you want to build

ALIGN / ASSESS / APPLY • ABOUT 60 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: _____

Customer experience

Operating day

Owner's role

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

Three perspectives on the business you want to build

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

INTERPRET THE RESULT CAREFULLY

These are independently written function-based alternatives; the supplier's three unpublished business scripts were not obtained.

The scenes should expose constraints as well as possibilities.

No financial or commercial outcome is implied by a vivid vision.

DEBRIEF QUESTIONS

01 What does the customer scene require that the operating scene does not yet provide?

02 What is the owner still doing that would limit the future business?

03 Which part of the vision depends on an untested assumption?

04 What would make the three scenes coherent?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner sees that the promised fast customer response cannot coexist with personally approving every decision, prompting a delegation and service-standard experiment.

A NEXT-STEP EXPERIMENT

Test one inconsistency between the three scenes before developing a larger plan.

My conclusion from this activity

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

Research basis: R03 R21 R20 • Conceptual support; this original activity is not independently validated.

Inventory references: Q27

Three perspectives on the business you want to build

Read or adapt the text below within the agreed purpose and professional boundaries.

SCENE 1 — THE CUSTOMER'S EXPERIENCE. Imagine an ordinary customer using the business at the chosen future date. What need brought them here? What happens at each important contact? What would they actually receive, observe or be able to do? Write one plausible account without invented praise. Then list the evidence you would need to show that the experience is reliable.

SCENE 2 — AN ORDINARY OPERATING DAY. Imagine a typical working day, not a launch event or an exceptional success. Who makes which decisions? Where does work wait? How are mistakes noticed and addressed? What information do colleagues need? Describe the conditions that make delivery dependable and identify the capability most likely to be missing today.

SCENE 3 — THE OWNER'S ROLE. Imagine your own working week in that business. What are you responsible for? What have you stopped doing? Who has authority that you currently retain? What do you need to learn, and what expertise should come from someone else? Notice any conflict between the role you want and what the business would require.

COMPARE. Place the three scenes side by side. Identify one contradiction, one dependency and one early test. Treat the vision as a proposition to investigate, not a future already secured.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

Resources and reference

Click an entry in the master PDF to open the section or resource.

Tool selection and sequencing routes 506

Twelve original routes for selecting and combining activities.

Ninety-day coaching programme 510

Contracting meeting plus twelve weekly sessions and between-session work.

Working agreement drafting template 515

Original terms for discussion and appropriate local review.

Values and qualities cards 519

Choice cards to support values and qualities activities.

21 goal-quality questions 522

Expanded prompts for ACE-C10.

25 strengths questions 523

Expanded prompts for ACE-D09.

37 fresh-perspective questions 525

Expanded prompts for ACE-E12.

Resources and reference

Click an entry in the master PDF to open the section or resource.

Randomised participant questionnaires 527

Five fixed randomised versions, followed by item keys.

Scoring and feedback examples 535

Worked calculations, profile plotting and an aggregation sheet.

Business-owner adaptation notes 540

Specific adaptations for the shared business-tool variants.

Fifty-space connection register 544

A practical register for ACE-N02.

Twelve monthly learning cards 549

Original questions, journals, intentions and weekly routes.

One-week content set 561

Seven original educational prompts and print-card layouts.

Content and brand-use guide 564

Accuracy, accessibility, confidentiality and presentation.

Resources and reference

Click an entry in the master PDF to open the section or resource.

Programme communication materials 566

Poster, messages, description, thirteen reminders and fifteen posts.

549 original coaching questions 575

Activity-linked questions selected from the original debriefs.

499 original reflective lines 597

Original thought-starters and practice invitations.

Inventory crosswalk 619

All 421 references with coverage types and master page locations.

Research references 644

Twenty-two sources and explicit evidence limitations.

Implementation and production notes 652

Pilot, review, accessibility, records and version control.

Choose a sequence, not a pile of tools

These are original facilitation routes. Select and adapt them; the client does not need to complete every activity.

Welcome and contracting

Begin with purpose and consent. Use only the intake prompts relevant to the engagement; select a baseline example before any rating.

ACE-A01 → ACE-A02 → ACE-A06 → ACE-A03 → ACE-A04

Balance and self-care

Start with the client's chosen life areas. Check organisational demands before prescribing personal practices; end with one feasible request or experiment.

ACE-H01 → ACE-H05 → ACE-H06 → ACE-H04 → ACE-H02 → ACE-I01

Career development

Combine narrative, values and behavioural evidence. Obtain feedback consent separately. Move from possibilities to a role-relevant development route.

ACE-D10 → ACE-D01 → ACE-D03 → ACE-D07 → ACE-D11 → ACE-C13

Choose a sequence, not a pile of tools

These are original facilitation routes. Select and adapt them; the client does not need to complete every activity.

Vision and goal setting

Choose one long-view exercise, not all three by default. Explore ambition, test assumptions and define the first ninety days.

ACE-C03 → ACE-C06 → ACE-C07 → ACE-C08 → ACE-C09 → ACE-C10 → ACE-C05 → ACE-C02

Life coaching and action

Use a custom starting question. Select action tools only after understanding meaning, barriers and support; avoid turning all of life into a productivity project.

ACE-H09 → ACE-H08 → ACE-H07 → ACE-F04 → ACE-F05 → ACE-F03 → ACE-G02

Productivity and time

Begin with an observation sample. Change workload and decision systems as well as personal habits; verify effects on colleagues.

ACE-G05 → ACE-G09 → ACE-G03 → ACE-G04 → ACE-G06 → ACE-G10 → ACE-G02

Choose a sequence, not a pile of tools

These are original facilitation routes. Select and adapt them; the client does not need to complete every activity.

Self-discovery

Keep personal disclosure optional. Translate values and identity reflections into behaviour without treating metaphors as assessment evidence.

ACE-B01 → ACE-B02 → ACE-B03 → ACE-B05 → ACE-E04 → ACE-B06 → ACE-B07

Fresh-start reset

Review what should be protected before changing anything. Consolidate duplicated insights into no more than three coherent changes.

ACE-H01 → ACE-H04 → ACE-H03 → ACE-E03 → ACE-F06 → ACE-I03 → ACE-C02

Executive leadership

Define the role challenge, combine self-view with consented evidence, practise a visible behaviour and review its organisational effect.

ACE-A03 → ACE-D15 → ACE-D07 → ACE-D16 → ACE-H13 → ACE-G10 → ACE-C12 → ACE-I01

Choose a sequence, not a pile of tools

These are original facilitation routes. Select and adapt them; the client does not need to complete every activity.

Business-owner coaching

Separate the owner, the business and the coaching contract. Use specialist advisers for financial, legal, regulatory and clinical questions.

ACE-O07 → ACE-O02 → ACE-O03 → ACE-O04 → ACE-O05 → ACE-O08 → ACE-O06 → ACE-O01

Workshop design and delivery

Choose opening, practice and closing activities around a specific learning objective. Adapt for access, language, hierarchy and safe participation.

ACE-N08 → ACE-J01 → ACE-J18 → ACE-J19 → ACE-J20 → ACE-J21 → ACE-N09

Grounding and imagery

Always offer a no-exercise and external-focus alternative. Choose one practice of suitable length; the longer versions are not inherently better.

ACE-M01 → ACE-M02 → ACE-M03 → ACE-M04 → ACE-M05

Ninety days of deliberate change

One contracting meeting (session 0) plus twelve weekly sessions. Thirteen contacts; not thirteen weeks of compulsory exercises.

Suggested 60-minute session: 10 minutes check-in and consent; 10 minutes review of the previous experiment; 25 minutes chosen activity; 10 minutes debrief and next step; 5 minutes closure. Adapt for need, access and the work that emerges. There is no obligation to follow a fixed curriculum.

0 Contract and orient

Confirm purpose, scope, confidentiality and sponsor arrangements. Record a baseline example and agree what will count as useful evidence.

Selected resources: ACE-A02 · ACE-A06 · ACE-A03

Between sessions: Write one situation to explore and one question about the engagement.

1 See the whole situation

Define personally relevant life areas. Explore the rating context and choose a priority without averaging the wheel.

Selected resources: ACE-H01 · ACE-A07

Between sessions: Notice one recurring pattern during an ordinary week.

2 Clarify what matters

Identify values, tensions and a behaviour that would express a chosen value in the current situation.

Selected resources: ACE-B02 · ACE-B03

Between sessions: Record one moment when the value was easier or harder to enact.

Ninety days of deliberate change

One contracting meeting (session 0) plus twelve weekly sessions. Thirteen contacts; not thirteen weeks of compulsory exercises.

3 Choose the direction

Explore motivation, practical conditions and a realistic ninety-day outcome. Check ownership rather than persuading the client.

Selected resources: ACE-C02 · ACE-C10 · ACE-A04

Between sessions: Gather evidence for the most uncertain assumption.

4 Strengthen support

Map useful support and prepare one reciprocal working-relationship conversation.

Selected resources: ACE-H07 · ACE-H13

Between sessions: Make one appropriate request or appreciation.

5 Set workable boundaries

Practise an accept, negotiate or decline response that fits responsibility, authority and risk.

Selected resources: ACE-H02 · ACE-G01

Between sessions: Use one safe boundary conversation and record the effect.

Ninety days of deliberate change

One contracting meeting (session 0) plus twelve weekly sessions. Thirteen contacts; not thirteen weeks of compulsory exercises.

6 Review energy and conditions

Review the first month honestly and distinguish personal practices from work-design changes.

Selected resources: ACE-H04 · ACE-H05 · ACE-I01

Between sessions: Test one change in conditions and one suitable restorative practice.

7 Build a small repeatable action

Design a cue-based behaviour and a manageable task breakdown. Check that the action is worth repeating.

Selected resources: ACE-F03 · ACE-F04

Between sessions: Track opportunities and attempts without treating missed days as failure.

8 Work with the barrier

Understand avoidance, capability gaps and external constraints before choosing a barrier response.

Selected resources: ACE-F05 · ACE-F11 · ACE-E10

Between sessions: Try the revised action once and record what you learned.

Ninety days of deliberate change

One contracting meeting (session 0) plus twelve weekly sessions. Thirteen contacts; not thirteen weeks of compulsory exercises.

9 Practise in the real role

Choose a role-relevant behaviour, rehearse it and agree feedback from an appropriate person.

Selected resources: ACE-D16 · ACE-G10 · ACE-E08

Between sessions: Complete one real-world attempt and request specific observations.

10 Review and simplify

Examine progress and workload; retain, change or stop activities that no longer serve the purpose.

Selected resources: ACE-F06 · ACE-G08 · ACE-I01

Between sessions: Implement one simplification and check its effect on others.

11 Consolidate learning

Identify changes supported by evidence, useful practices to retain and a meaningful way to recognise progress.

Selected resources: ACE-I04 · ACE-H11 · ACE-I06

Between sessions: Draft a client-owned summary and a maintenance plan.

Ninety days of deliberate change

One contracting meeting (session 0) plus twelve weekly sessions. Thirteen contacts; not thirteen weeks of compulsory exercises.

12 Close and look ahead

Review the engagement, agree records and sponsor closure, and plan an independent next-period review.

Selected resources: ACE-I05 · ACE-C02

Between sessions: Use the maintenance plan and review at the chosen future date.

Make the working agreement explicit

Original practice-agreement drafting template. It is not a jurisdiction-ready legal contract. Obtain appropriate review of commercial, liability, privacy, confidentiality, termination and governing-law provisions before operational use; no governing law or tax treatment is assumed.

1. Parties, purpose and scope

This coaching engagement is between [client], [coach/provider] and, where relevant, [sponsor]. Its agreed purpose is [client-owned purpose]. Coaching supports reflection, learning and chosen action. It does not replace clinical care, legal or financial advice, or decisions that belong to the client or organisation. The coach will work within their competence and discuss other support where appropriate.

Engagement-specific terms / questions to resolve

2. Roles and participation

The client remains responsible for their choices and may question, decline or adapt an exercise. The coach will offer a professional process, respectful challenge and honest feedback. The sponsor’s role is [agreed role]. No particular personal or business outcome is guaranteed. Access and communication preferences are [agreed preferences].

Engagement-specific terms / questions to resolve

Make the working agreement explicit

Original practice-agreement drafting template. It is not a jurisdiction-ready legal contract. Obtain appropriate review of commercial, liability, privacy, confidentiality, termination and governing-law provisions before operational use; no governing law or tax treatment is assumed.

3. Meetings and practical arrangements

The agreed programme is [number, duration and frequency of sessions], delivered through [location/approved platform]. Between-session contact is limited to [agreed purpose, channel and response expectations]. Fees, billing, cancellations, rescheduling and expenses are specified in [commercial schedule]. Complete these terms before signature.

Engagement-specific terms / questions to resolve

4. Confidentiality and sponsor reporting

Session content and client worksheets will be treated as confidential within the agreed professional and legal limits. The only routine sponsor information to be shared is [specific information], with [approval process]. Exceptions and any disclosure obligations are [reviewed applicable terms]. Where appropriate and lawful, the coach will discuss a necessary disclosure with the client first. Do not promise absolute secrecy.

Engagement-specific terms / questions to resolve

Make the working agreement explicit

Original practice-agreement drafting template. It is not a jurisdiction-ready legal contract. Obtain appropriate review of commercial, liability, privacy, confidentiality, termination and governing-law provisions before operational use; no governing law or tax treatment is assumed.

5. Records, privacy and technology

The records collected are [types], for [purposes]. They are stored in [approved system], accessible to [roles], and retained or deleted under [reviewed policy and applicable requirements]. Recording, transcription or AI assistance will not be used without a separately explained and agreed arrangement covering purpose, providers, access and relevant risks. Do not upload identifiable client material to an unapproved tool.

Engagement-specific terms / questions to resolve

6. Feedback, concerns and professional boundaries

The client may raise concerns with [contact/route]. We will review the usefulness of the engagement at [interval]. The coach will disclose relevant conflicts of interest and discuss boundaries or another professional service when the work falls outside scope. Emergency and safeguarding arrangements are [locally appropriate procedure]. Coaching contact is not an emergency service.

Engagement-specific terms / questions to resolve

Make the working agreement explicit

Original practice-agreement drafting template. It is not a jurisdiction-ready legal contract. Obtain appropriate review of commercial, liability, privacy, confidentiality, termination and governing-law provisions before operational use; no governing law or tax treatment is assumed.

7. Review, change and ending

Either party may propose changes to purpose or process. Material changes to scope, fees, confidentiality or technology arrangements will be agreed explicitly. Ending, notice and any financial consequences are [reviewed terms]. At closure we will confirm any sponsor communication, outstanding obligations and records arrangements.

Engagement-specific terms / questions to resolve

8. Confirmation

We have discussed the purpose, roles, practical arrangements, confidentiality, records, limits and ending of this engagement. Questions still to resolve: [ ]. Client name/signature/date: [ ]. Coach name/signature/date: [ ]. Sponsor acknowledgement, where relevant and limited to their agreed role: [ ]. Do not sign with essential terms incomplete.

Engagement-specific terms / questions to resolve

A vocabulary for values

Choose, reject, rename or add words. The list is a prompt set, not a theory-based questionnaire or a complete account of values.

Achievement	**Adventure**	**Authenticity**
Autonomy	**Balance**	**Belonging**
Care	**Clarity**	**Collaboration**
Commitment	**Community**	**Compassion**
Competence	**Contribution**	**Courage**
Creativity	**Curiosity**	**Dignity**
Discipline	**Excellence**	**Fairness**
Family	**Flexibility**	**Freedom**
Friendship	**Growth**	**Health**
Honesty	**Humility**	**Inclusion**

My chosen words / what each means in observable behaviour

A vocabulary for values

Choose, reject, rename or add words. The list is a prompt set, not a theory-based questionnaire or a complete account of values.

Independence	**Innovation**	**Integrity**
Joy	**Justice**	**Kindness**
Learning	**Loyalty**	**Meaning**
Openness	**Order**	**Patience**
Peace	**Practicality**	**Reliability**
Respect	**Responsibility**	**Security**
Service	**Simplicity**	**Stability**
Stewardship	**Sustainability**	**Trust**
Understanding	**Variety**	**Wellbeing**
Wisdom	**Add your own: _____**	**Add your own: _____**

My chosen words / what each means in observable behaviour

Qualities for a chosen challenge

Select ten, then seven, five and three for the current challenge. Restore all the cards afterwards: priorities change; qualities are not taken away.

Attentive	**Brave**	**Calm**	**Clear**
Collaborative	**Considerate**	**Consistent**	**Constructive**
Creative	**Curious**	**Decisive**	**Dependable**
Determined	**Fair-minded**	**Flexible**	**Generous**
Honest	**Imaginative**	**Inclusive**	**Independent**
Methodical	**Open-minded**	**Patient**	**Practical**
Reflective	**Respectful**	**Resourceful**	**Responsible**
Steady	**Thoughtful**	**Willing to learn**	**Add your own**

What my choices reveal about this challenge / one quality to practise

21 questions for a well-chosen goal

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

01 What change do you actually want, in your own words?

02 Why does this matter to you now?

03 Whose goal is this, and what part do you personally choose?

04 What would be observably different if you made progress?

05 Who would benefit, and who might bear a cost?

06 What evidence describes the starting position?

07 Which part of the outcome is within your influence?

08 What important responsibility or value must be protected?

09 What would make the goal challenging but workable?

10 What capability will you need to develop?

11 What support or agreement is required from others?

12 What assumption about the situation needs checking?

13 What competing priority will you need to reduce or renegotiate?

14 What is the smallest useful milestone?

15 What obstacle is most likely to appear first?

16 When that obstacle appears, what response will you try?

17 What action can you take in the next seven days?

18 How will you distinguish activity from meaningful progress?

19 When will you review the goal and with what evidence?

20 What information would justify changing or stopping the goal?

21 What would make the pursuit of this goal worthwhile even if the final result differs from your expectation?

25 questions for strengths with evidence

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

01 When have you recently made a useful difference?

02 What did you actually do in that situation?

03 Which part of the result can reasonably be attributed to your contribution?

04 What would another person have observed?

05 What do colleagues repeatedly ask you to help with?

06 What difficult task has become easier through your practice?

07 When have you learned something faster than you expected?

08 What do you do reliably even when nobody is watching?

09 Which contribution do you dismiss because it feels ordinary to you?

10 What feedback have you received more than once?

11 What evidence supports that feedback?

12 In what situation does this strength work best?

13 What conditions help you express it?

14 Where does the same approach become less useful?

15 How might you overuse this strength under pressure?

16 What complementary capability would make it more effective?

17 Who models a more skilful version of this behaviour?

18 What could you learn from that person without copying their style?

19 Which strength is not fully used in your current role?

20 Where could it contribute to a real organisational need?

21 What would a small stretch application look like?

22 What support would make that stretch responsible?

23 How will you know whether the strength transferred to the new situation?

24 Who can give you specific feedback on the attempt?

25 questions for strengths with evidence

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

25 What do you now want to practise, protect or use differently?

37 questions that open a fresh view

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

01 What is the situation when described without a judgement?

02 What are you treating as certain that may still be an assumption?

03 What evidence would a neutral observer ask to see?

04 What part of the situation have you not yet asked about?

05 What would the other person say matters to them?

06 What alternative explanation deserves a fair hearing?

07 What are you predicting, and how likely is it really?

08 What would you do if the feared outcome occurred?

09 What has happened before that differs from the current story?

10 When is this problem less intense or less frequent?

11 What is different on those occasions?

12 What resource are you already using without noticing?

13 What part of the situation can you influence directly?

14 What requires agreement rather than more personal effort?

15 What lies outside your present authority?

16 What is the decision you have been postponing?

17 What useful discomfort might you be avoiding?

18 What legitimate boundary might you need to protect?

19 What would a fairer description of your contribution sound like?

20 What would you say to a respected colleague in the same position?

21 Which rule are you applying too rigidly?

22 When would that rule be useful, and when would it not?

23 What would change if you separated the person from the behaviour?

24 What are you trying to control that needs a different response?

37 questions that open a fresh view

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

25 What is the smallest responsible experiment available?

26 What would you try if the purpose were learning rather than proving yourself?

27 What would be enough progress for this week?

28 What could you stop doing to make space for that progress?

29 What request have you not made clearly?

30 Who could offer a perspective you do not currently have?

31 What practical support would make the next step possible?

32 What do you need to understand before choosing a solution?

33 What consequence should not be minimised?

34 What would tell you that specialist help is more appropriate?

35 What choice remains yours even if the circumstances do not improve immediately?

36 What evidence will you review after the next step?

37 What do you now see differently, and what will you do with that difference?

Motivation and readiness profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Rate each statement 0–10: 0 = not at all true of my current situation; 10 = fully true. Use N/A when you cannot answer. Think about the chosen goal now.

NO.	STATEMENT / QUESTION	RATING
01	This goal supports something that matters to me.	
02	I can explain why I personally choose this goal.	
03	I know where to obtain help with difficult parts.	
04	I can explain the cost of leaving the situation unchanged.	
05	I have room to influence how I pursue this goal.	
06	The likely benefit is worth the effort required.	
07	I would still value this change without external praise.	
08	I have enough practical time to take the next step.	
09	I have evidence that I can learn the required skill.	
10	I know the next behaviour I need to practise.	
11	I can obtain the resources needed for the next step.	
12	The people or systems involved make action possible.	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Life satisfaction conversation profile

ALIGN / AGREE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Rate current satisfaction 0–10: 0 = not at all satisfied; 10 = fully satisfied by your own definition. Use N/A where needed. Discuss what each area means to you.

NO.	STATEMENT / QUESTION	RATING
01	How satisfied are you with how your current life fits what matters to you?	
02	How satisfied are you with the quality of your important relationships?	
03	How satisfied are you with opportunities to learn and develop?	
04	How satisfied are you with your opportunity to recover from demands?	
05	How satisfied are you with the practical stability needed to manage daily life?	
06	How satisfied are you with the place of non-work activities in your life?	
07	How satisfied are you with the choices available to you?	
08	How satisfied are you with the contribution your work allows you to make?	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

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
01	Makes the decision and its owner clear.	
02	Delegates with clear boundaries and support.	
03	Invites relevant views before deciding.	
04	Uses feedback to make a visible adjustment.	
05	Listens without interrupting or dismissing concerns.	
06	Addresses difficulties respectfully and promptly.	
07	Follows through on agreed commitments.	
08	Explains the reasoning behind important changes.	

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

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

A sustainable self-care practices review

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

Client code: _____ Date: _____

Over the past two weeks: 0 = never; 1 = rarely; 2 = sometimes; 3 = often; 4 = consistently. Use N/A where appropriate. Rate opportunity and experience honestly, not an ideal lifestyle.

NO.	STATEMENT / QUESTION	RATING
01	I made space for everyday routines that support me.	
02	I had a realistic opportunity to pause after demanding work.	
03	I renegotiated an expectation that had become unrealistic.	
04	I protected at least one personally important commitment.	
05	I made my available capacity clear when taking on work.	
06	I could ask someone for practical help when needed.	
07	I maintained contact with people who matter to me.	
08	I could disengage from work for a period that suited my circumstances.	
09	I attended to an avoidable problem in my immediate environment.	
10	I arranged appropriate support for a practical need rather than indefinitely postponing it.	
11	I spent some time on an activity I found restorative.	
12	I had a conversation in which I felt heard.	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Workshop feedback that leads to improvement

ALIGN / AGREE / ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Rate each statement: 1 = strongly disagree; 2 = disagree; 3 = neither agree nor disagree; 4 = agree; 5 = strongly agree. Use N/A where you cannot judge. Add what was useful and what should change.

NO.	STATEMENT / QUESTION	RATING
01	The content was relevant to my work.	
02	The purpose of the session was clear.	
03	The activities helped me identify a practical next step.	
04	The session respected different perspectives and boundaries.	
05	I had a suitable way to participate.	
06	The explanations and instructions were understandable.	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Item order and interpretation key

Randomisation changes presentation order only. Use the original item identity when summarising responses.

ACE-A04 / Motivation and readiness profile

01 → MI1 | 02 → MO1 | 03 → MC3 | 04 → MI3 | 05 → MO2 | 06 → MI2 | 07 → MO3 | 08 → MS1 | 09 → MC2 | 10 → MC1 | 11 → MS3 | 12 → MS2

Ownership, Importance, Capability and Conditions each contain three items. Mean = sum of valid item responses / number answered. Score a domain only with at least two answers; a two-item mean is provisional. Do not calculate a total or apply cut-offs.

ACE-A07 / Life satisfaction conversation profile

01 → LS8 | 02 → LS2 | 03 → LS5 | 04 → LS3 | 05 → LS7 | 06 → LS6 | 07 → LS4 | 08 → LS1

Interpret each item separately. Do not average the items or label wellbeing levels. The overall-life-fit item is a separate reflection, not a total score. Repeated ratings require the same area definitions.

Item order and interpretation key

Randomisation changes presentation order only. Use the original item identity when summarising responses.

ACE-D07 / Developmental feedback from several perspectives

01 → FB1 | 02 → FB5 | 03 → FB3 | 04 → FB8 | 05 → FB4 | 06 → FB7 | 07 → FB6 | 08 → FB2

Keep self-ratings separate from others. For each item, show an others' mean only when at least three valid other ratings exist; otherwise use consented examples without a numerical aggregate. Report n and range. This rule reduces overinterpretation; it does not guarantee anonymity or validate the instrument. No total score.

ACE-H06 / A sustainable self-care practices review

01 → SC10 | 02 → SC01 | 03 → SC09 | 04 → SC08 | 05 → SC07 | 06 → SC04 | 07 → SC06 | 08 → SC03 | 09 → SC11 | 10 → SC12 | 11 → SC02 | 12 → SC05

Recovery = items 1–3; Support = 4–6; Boundaries = 7–9; Practical care = 10–12. Domain mean = valid sum / valid count, with at least two answers. Two-item means are provisional. No total, norms, diagnostic thresholds or employment-decision use.

Item order and interpretation key

Randomisation changes presentation order only. Use the original item identity when summarising responses.

ACE-N09 / Workshop feedback that leads to improvement

01 → WF02 | 02 → WF01 | 03 → WF05 | 04 → WF06 | 05 → WF04 | 06 → WF03

Report item response distributions, valid n and missing counts. A mean may be shown descriptively with the distribution, not as a validated quality score. Do not calculate a total. Immediate feedback does not demonstrate later learning transfer.

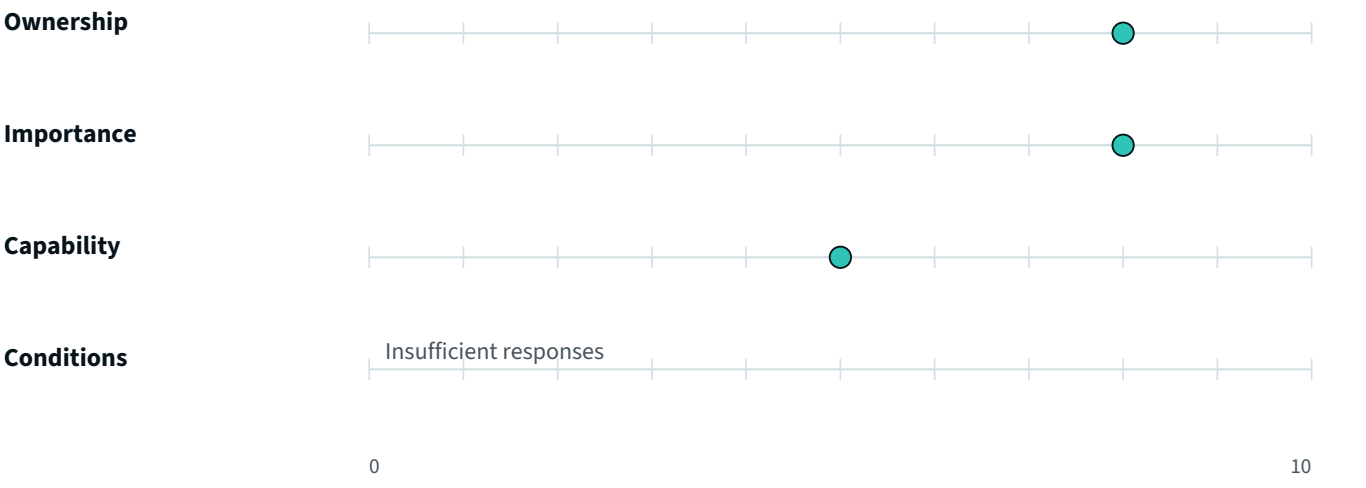
Results without false precision

Worked examples are fictional. These calculations illustrate the stated rules; they do not validate the instrument.

Ownership	8, 7, 9	**24 / 3 = 8.0**
Importance	9, 8, 7	**24 / 3 = 8.0**
Capability	6, N/A, 4	**10 / 2 = 5.0***
Conditions	3, N/A, N/A	**Not scored**

* A two-item domain mean is provisional. With fewer than two valid responses, leave the domain unscored. Missing is not zero. Do not calculate an overall score.

PROFILE: INTERPRET THE PATTERN WITH CONTEXT



What the examples behind the profile suggest / what remains uncertain

One chosen response and a review date — not a diagnosis

Results without false precision

Worked examples are fictional. These calculations illustrate the stated rules; they do not validate the instrument.

Recovery	1, 2, 1	**4 / 3 = 1.33**
Support	3, 4, 3	**10 / 3 = 3.33**
Boundaries	1, N/A, 3	**4 / 2 = 2.0***
Practical care	N/A, N/A, 2	**Not scored**

* A two-item domain mean is provisional. With fewer than two valid responses, leave the domain unscored. Missing is not zero. Do not calculate an overall score.

PROFILE: INTERPRET THE PATTERN WITH CONTEXT



What the examples behind the profile suggest / what remains uncertain

One chosen response and a review date — not a diagnosis

Results without false precision

Worked examples are fictional. These calculations illustrate the stated rules; they do not validate the instrument.

Illustrative responses: contribution through work = 8; relationships = 5; recovery = 3; choice and influence = 6; learning = 7; life outside work = 4; practical stability = N/A; overall life fit = 6. These are eight separate reflections. Do not add or average them.

WHAT MAY BE EXPLORED

The client may choose to discuss recovery or life outside work, but the lowest number does not automatically determine the agenda. Ask about importance, context and what improvement would mean.

WHAT CANNOT BE CONCLUDED

The responses do not establish a wellbeing category, a clinical condition or how the client compares with others. The overall-life-fit item is not a computed total.

A USEFUL NEXT STEP

Agree one specific question or action, then review the same area definition after a suitable period. Record what happened and other changes in circumstances.

My area definitions and the context behind the responses

The question I choose to explore / action and review

Results without false precision

Worked examples are fictional. These calculations illustrate the stated rules; they do not validate the instrument.

Illustration: four valid other ratings of 2, 3, 3 and 4 give n = 4, mean = 3.0 and range = 2–4. A self-rating of 2 remains separate. With only two valid other ratings, do not show the numerical aggregate under this toolkit's rule; use appropriately consented examples. A minimum n does not guarantee anonymity.

BEHAVIOUR ITEM	SELF	OTHER n	MEAN	RANGE
FB1 Makes the decision and its owner clear.				
FB2 Explains the reasoning behind important changes.				
FB3 Invites relevant views before deciding.				
FB4 Listens without interrupting or dismissing concerns.				
FB5 Delegates with clear boundaries and support.				
FB6 Follows through on agreed commitments.				
FB7 Addresses difficulties respectfully and promptly.				
FB8 Uses feedback to make a visible adjustment.				

Converging examples, disagreements and context

One behaviour to practise / observer / review date

Results without false precision

Worked examples are fictional. These calculations illustrate the stated rules; they do not validate the instrument.

Illustration for one workshop-feedback item: ratings 4, 5, 4, 3 and N/A give four valid responses and one missing response. The distribution is: 3 = one, 4 = two, 5 = one. A descriptive mean is (4 + 5 + 4 + 3) / 4 = 4.0. Keep the distribution and comments visible; do not convert it into a validated quality grade.

Item / valid n / missing n / response distribution

What participants found useful — remove identifying detail

What should change — evidence and design decision

Later application evidence / follow-up only with appropriate permission

Use shared tools in a business context

These notes retain the separately inventoried business variants without claiming that commercial files were identical.

Q02 → ACE-G03

Define impact as a verified contribution to customer value, delivery or an agreed business outcome; include cash and people capacity only with appropriate evidence.

Q03 → ACE-G04

Allocate owner time to business-critical work and management development before filling the diary with operational requests.

Q05 → ACE-D03

Distinguish the owner’s personal skill from a capability that other people can reliably deliver.

Q06 / Q07 → ACE-O01 / ACE-D13 / ACE-D14

Use the annual and quarterly boards with business milestones, accountable owners, dependencies and evidence; they are not forecasts.

Q12 → ACE-A03

Record both business purpose and owner-development behaviour; specify which information advisers or partners may receive.

Q13 → ACE-I01

Review owner behaviour and business indicators separately. Do not attribute all commercial change to coaching.

Use shared tools in a business context

These notes retain the separately inventoried business variants without claiming that commercial files were identical.

Q14 → ACE-F03

Choose a small owner routine that supports business quality, such as reviewing exceptions, not a vague habit of being entrepreneurial.

Q15 → ACE-G10

Include partner and governance limits in the delegation agreement; distinguish ownership rights from day-to-day decision authority.

Q16 → ACE-G05

Sample founder bottlenecks, rework and unplanned approvals; avoid using the log to monitor employees covertly.

Q18 → ACE-G06

Define a genuine customer or operational escalation route while reducing reassurance and routine approval interruptions.

Q19 → ACE-E08

Use a mentor’s likely questions as hypotheses, not as their actual advice or endorsement.

Q20 → ACE-B07

Write the owner’s purpose and the business purpose separately before looking for alignment.

Use shared tools in a business context

These notes retain the separately inventoried business variants without claiming that commercial files were identical.

Q21 → ACE-F02

Record the business action, accountable owner, evidence, dependency and decision date.

Q22 → ACE-C12

Test the commercial assumption and identify a responsible commitment boundary before acting.

Q23 → ACE-D05

Keep personal strengths and gaps separate from the business SWOT in ACE-O03.

Q24 → ACE-D08

Consider whether the owner should develop the skill or obtain it through another role or qualified adviser.

Q25 → ACE-H14

Review workload, operational dependency and recovery; do not assume owner status means unlimited capacity.

Q26 → ACE-G09

Check actual customer, contractual and safety consequences before deciding what is urgent.

Use shared tools in a business context

These notes retain the separately inventoried business variants without claiming that commercial files were identical.

Q28 → ACE-G07

Use a small owner task plan alongside, not instead of, the business's operational and project systems.

Q29 → ACE-E03

Separate emotional attachment, legitimate obligation and unresolved commercial risk before deciding what to release.

Q30 → ACE-F10

Describe avoidable conditions or processes, not employees as irritations; assign the improvement to the right authority.

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
23			
24			
25			
26			
27			
28			
29			
30			
31			
32			
33			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
34			
35			
36			
37			
38			
39			
40			
41			
42			
43			
44			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
45			
46			
47			
48			
49			
50			

Choose a worthwhile direction

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

A clear goal is a choice about contribution, effort and evidence.

A QUESTION TO DISCUSS

Which outcome matters enough to change how you use your time?

A JOURNAL PROMPT

Describe a goal you chose and one you inherited. What difference does that make?

A GROUNDED INTENTION

I can choose a useful next step without pretending to control the whole outcome.

FOUR WEEKLY ROUTES

Week 1 · ACE-C01: The annual direction planner

Week 2 · ACE-C05: A clear and workable goal

Week 3 · ACE-C10: Twenty-one goal-quality questions

Week 4 · ACE-C02: The next 90 days

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Act with care and useful energy

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Care becomes visible through attention, fair behaviour and useful support.

A QUESTION TO DISCUSS

What would helpful support look like to the person receiving it?

A JOURNAL PROMPT

Record one moment when you checked what help was welcome.

A GROUNDED INTENTION

I can offer support while respecting another person’s choice.

FOUR WEEKLY ROUTES

Week 1 · ACE-H16: Kindness as a series of chosen actions

Week 2 · ACE-H04: Identify what drains and restores energy

Week 3 · ACE-H07: Map the people who help you move forward

Week 4 · ACE-H19: Five specific things to appreciate

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Make room for a more satisfying week

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Small improvements work best when they fit the life you actually have.

A QUESTION TO DISCUSS

What could you simplify without losing something important?

A JOURNAL PROMPT

Describe one ordinary moment you would like to improve and why.

A GROUNDED INTENTION

I can make one worthwhile change without redesigning everything.

FOUR WEEKLY ROUTES

Week 1 · ACE-I03: A fresh-start review of commitments and conditions

Week 2 · ACE-H15: Add one source of brightness to an ordinary week

Week 3 · ACE-H11: Make room for what brings you alive

Week 4 · ACE-G08: Choose what to stop, reduce or refuse

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Build confidence from practice

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Confidence is more credible when it is connected to evidence and preparation.

A QUESTION TO DISCUSS

What have you done before that could inform this challenge?

A JOURNAL PROMPT

Describe a capable moment and separate your behaviour from the conditions.

A GROUNDED INTENTION

I can prepare, practise and learn from an imperfect attempt.

FOUR WEEKLY ROUTES

Week 1 · ACE-D03: Strengths with evidence and range

Week 2 · ACE-E05: Learn from a credible role model

Week 3 · ACE-E08: Borrow a mentor's perspective

Week 4 · ACE-D16: Leadership presence in behaviour

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Understand what coaching offers

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Coaching is a structured partnership, not a promise that every problem will be solved.

A QUESTION TO DISCUSS

What would make a coaching conversation useful to you?

A JOURNAL PROMPT

Describe the difference between advice you need and reflection you need.

A GROUNDED INTENTION

I can ask for support while retaining responsibility for my choices.

FOUR WEEKLY ROUTES

Week 1 · ACE-N11: Explain the value and limits of coaching

Week 2 · ACE-A03: Coaching outcomes and evidence map

Week 3 · ACE-I01: Review progress without performing success

Week 4 · ACE-I05: Close the engagement and transfer ownership

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Express values in behaviour

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Values become useful when they inform a real choice or trade-off.

A QUESTION TO DISCUSS

Which value needs to be visible in your next decision?

A JOURNAL PROMPT

Write about a tension between two legitimate values.

A GROUNDED INTENTION

I can act consistently with a chosen value while acknowledging competing needs.

FOUR WEEKLY ROUTES

Week 1 · ACE-B02: A working vocabulary of values

Week 2 · ACE-B03: Values into everyday choices

Week 3 · ACE-B07: A leadership purpose statement

Week 4 · ACE-D16: Leadership presence in behaviour

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Protect sustainable performance

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Sustainable work requires attention to conditions as well as personal routines.

A QUESTION TO DISCUSS

What demand needs redesign rather than more endurance?

A JOURNAL PROMPT

Describe a boundary that would support both quality and sustainability.

A GROUNDED INTENTION

I can ask for clearer conditions and choose a feasible restorative practice.

FOUR WEEKLY ROUTES

Week 1 · ACE-H01: The whole-life balance wheel

Week 2 · ACE-H05: Turn unmet needs into practical requests

Week 3 · ACE-H06: A sustainable self-care practices review

Week 4 · ACE-H14: Restore useful energy at work

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Turn inspiration into an experiment

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

An idea becomes more useful when it meets a small real-world test.

A QUESTION TO DISCUSS

What is the smallest responsible version of the action?

A JOURNAL PROMPT

Record the cue, action and barrier response for a chosen experiment.

A GROUNDED INTENTION

I can learn from an attempt without making it a judgement of my worth.

FOUR WEEKLY ROUTES

Week 1 · ACE-F01: Generate actions before choosing

Week 2 · ACE-F04: Break the large task into workable pieces

Week 3 · ACE-F03: Design a small daily habit

Week 4 · ACE-F11: From excuse language to a barrier plan

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Define success with evidence

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Visible activity and meaningful progress are not the same thing.

A QUESTION TO DISCUSS

What evidence would show that the work made a difference?

A JOURNAL PROMPT

Describe a result, the contribution you made and other factors involved.

A GROUNDED INTENTION

I can recognise progress honestly and revise a plan when evidence changes.

FOUR WEEKLY ROUTES

Week 1 · ACE-C05: A clear and workable goal

Week 2 · ACE-D12: An annual career development plan

Week 3 · ACE-I01: Review progress without performing success

Week 4 · ACE-I04: Make the learning visible at the end of a programme

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Respond constructively to difficulty

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

A difficult experience deserves both an accurate account and a workable response.

A QUESTION TO DISCUSS

What interpretation could be checked before you act on it?

A JOURNAL PROMPT

Separate what happened, what you assumed and what you now choose.

A GROUNDED INTENTION

I can be accountable without turning a setback into a global judgement.

FOUR WEEKLY ROUTES

Week 1 · ACE-E01: Thinking patterns: a reality check

Week 2 · ACE-E07: Reframe a limitation without denying it

Week 3 · ACE-E10: Test a limiting rule

Week 4 · ACE-F05: Understand and interrupt procrastination

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Improve the quality of connection

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

Useful relationships depend on listening, clarity and reciprocal agreements.

A QUESTION TO DISCUSS

What expectation has never been made explicit?

A JOURNAL PROMPT

Write the other person’s possible perspective and mark what remains unknown.

A GROUNDED INTENTION

I can ask, listen and clarify rather than assume I already understand.

FOUR WEEKLY ROUTES

Week 1 · ACE-H13: Strengthen a working relationship deliberately

Week 2 · ACE-J18: Listen, reflect and check

Week 3 · ACE-H07: Map the people who help you move forward

Week 4 · ACE-J15: See the decision from another role

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

Review, release and recognise

Original educational content for a coaching conversation, workshop or newsletter.

THE IDEA

A good review acknowledges contribution, cost, learning and unfinished work.

A QUESTION TO DISCUSS

What should you carry forward, and what no longer serves the purpose?

A JOURNAL PROMPT

Record one contribution, one lesson and one commitment to reconsider.

A GROUNDED INTENTION

I can acknowledge what I have done and choose the next period deliberately.

FOUR WEEKLY ROUTES

Week 1 · ACE-I02: Close one year and choose the next

Week 2 · ACE-I06: Recognise your contribution with evidence

Week 3 · ACE-I04: Make the learning visible at the end of a programme

Week 4 · ACE-I05: Close the engagement and transfer ownership

For each week: use one debrief question, one written reflection, one chosen intention and a small experiment from the linked activity. Do not promise an outcome or publish client details.

One week of useful prompts

Text and print-card layouts. These are not the supplier’s social-media graphics or editable Canva files.

MONDAY / QUESTION / ACE-C02

What is the most useful outcome you could influence this week?

Choose one outcome and describe visible evidence of progress.

TUESDAY / REFLECTION / ACE-G02

A full calendar is not evidence of a useful week.

Notice which commitment deserves protected attention.

WEDNESDAY / PRACTICE / ACE-J18

Before offering a solution, check that you understand the question.

Try one accurate summary and invite correction.

One week of useful prompts

Text and print-card layouts. These are not the supplier’s social-media graphics or editable Canva files.

THURSDAY / QUESTION / ACE-H05

What request have you not yet made clearly?

Write a specific, feasible request with room for the other person’s response.

FRIDAY / REVIEW / ACE-I01

What changed because of your action, and what changed for other reasons?

Record one observation before deciding the next step.

SATURDAY / JOURNAL / ACE-H11

Describe a moment that restored your interest or energy.

What conditions made it possible, and could one be protected next week?

One week of useful prompts

Text and print-card layouts. These are not the supplier’s social-media graphics or editable Canva files.

SUNDAY / INTENTION / ACE-G01

I can choose a manageable next step without filling every available moment.

Select one useful action and one commitment to protect.

Make the content useful and accurate

Purpose before format

Use a question, reflection or practical invitation because it serves the audience. Do not treat a graphic count as evidence of learning value. The monthly cards, seven-day set and original thought-starters can be used in newsletters, workshops and client discussions.

Brand placement

Use the approved HR Delivery logo artwork when available; do not reconstruct it from type or redraw it. This publication uses a typographic HR Delivery masthead. Leave clear space around a logo, use navy text on light surfaces and keep teal for accents or backgrounds with dark text.

One message per card

Choose a short headline, one original prompt and one practical next step. Keep paragraphs brief, use readable type and provide equivalent text when a graphic is posted. Avoid decorative charts that imply data where none exist.

Make the content useful and accurate

Originality and attribution

The 499 thought-starters are original editorial lines from this toolkit, not quotations attributed to famous people. Do not add a person's name to them. Research references support concepts, not the validity of a newly written worksheet.

Review before publication

Check accuracy, accessibility, confidentiality, claims, contact details and any local advertising or privacy requirements. Mark all fictional examples as fictional. Do not publish completed client worksheets as promotional examples without specific informed permission.

What this edition supplies

This edition supplies coaching activities, original scripts, educational text, print-ready monthly cards, a sample week and communication templates. It does not claim to contain the supplier's Canva projects, hundreds of JPG variants, MP3 recordings or a Spanish translation set.

Ninety days of deliberate change

A structured executive-coaching programme from HR Delivery

**Choose a direction.
Practise in real work.
Review what changes.**

PURPOSE

Create space to examine a meaningful challenge, choose practical experiments and learn from the results.

STRUCTURE

One contracting meeting followed by twelve weekly sessions, adapted to the client's needs and circumstances. Confidentiality, scope and sponsor arrangements are agreed explicitly.

WHAT TO EXPECT

Reflection, evidence, respectful challenge, selected activities and between-session practice. Coaching is not a guarantee of business or personal outcomes and does not replace specialist care or advice.

PRACTICAL DETAILS

Coach: [name] | Format: [online / in person]
Dates and time zone: [ ] | Fee and terms: [ ]
Enquiries: [approved contact]

Five messages for five conversations

Print-ready headline cards. Pair each with an accurate purpose, clear next step and the relevant programme details.

01 **A direction you genuinely choose.**

02 **Support that fits the real situation.**

03 **Small experiments in real work.**

04 **An honest review of what changes.**

05 **An ending that transfers ownership.**

A clear invitation, without inflated promises

An executive role can leave little time to examine how decisions, relationships and working habits are shaping results. HR Delivery's Ninety Days of Deliberate Change programme provides a structured space to do that work.

The engagement begins by agreeing a purpose, the boundaries of coaching, confidentiality and what useful progress would look like. Across twelve weekly sessions, the coach and client select relevant activities, consider evidence, practise realistic changes and review what happens. The route is adapted to the person rather than treated as a compulsory sequence of worksheets.

Possible topics include leadership presence, decision clarity, delegation, working relationships, boundaries, motivation and sustainable performance. The client remains responsible for their choices. Where a need is better addressed through training, organisational action or specialist advice, that distinction is made explicit.

This is not a promise of a particular outcome. It is a professional process for thinking more clearly, acting deliberately and learning from experience.

Practical details: [named coach and relevant credentials], [format], [dates and time zone], [fee and terms], [approved contact]. A first conversation can help determine whether this engagement is appropriate.

Thirteen contact points, thirteen reminders

Original text for programme communication. These are not quotations from named experts or claims about actual client outcomes.

00 Contract and orient

Unresolved confidentiality or coercion means pause contracting rather than begin sensitive exercises.

01 See the whole situation

Do not average the spokes or interpret the area of the polygon as a wellbeing score.

02 Clarify what matters

Value priorities are contextual and may change; a card sort does not reveal an immutable essence.

03 Choose the direction

Use a desired future as a direction, not a prediction.

04 Strengthen support

A larger network is not necessarily a more supportive one.

05 Set workable boundaries

A boundary is an agreement about behaviour or access, not a judgement of another person.

Thirteen contact points, thirteen reminders

Original text for programme communication. These are not quotations from named experts or claims about actual client outcomes.

06 Review energy and conditions

Self-reported energy varies with context and is not a clinical score.

07 Build a small repeatable action

Repetition in context matters more than a dramatic initial effort.

08 Work with the barrier

Delay can be a rational response to conflicting demands.

09 Practise in the real role

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

10 Review and simplify

Not every frustration needs immediate correction.

11 Consolidate learning

A highlight should connect to a specific example rather than a slogan.

Thirteen contact points, thirteen reminders

Original text for programme communication. These are not quotations from named experts or claims about actual client outcomes.

12 Close and look ahead

Closure can be appropriate even when some goals remain unfinished.

Fifteen short educational posts

Three sets of five: introduce the work, support the practice, and review the learning. Adapt dates and contact details before publishing.

01 What would make the next ninety days more useful? Begin with one outcome you genuinely choose, one example of your current situation and one piece of evidence you will review.

02 A coaching programme should make its purpose and boundaries clear before introducing exercises. Ask what will be confidential, what may be shared and how progress will be discussed.

03 A wheel is a conversation starter, not a verdict. Define the areas in your own words and choose the one that deserves attention in your current circumstances.

04 Values become practical when they affect a choice. Which value needs to be visible in your next difficult conversation?

05 Support is more useful when the request is clear. What practical help would make your next step possible?

Fifteen short educational posts

Three sets of five: introduce the work, support the practice, and review the learning. Adapt dates and contact details before publishing.

06 A boundary can protect quality as well as wellbeing. Consider what you can accept, what needs negotiation and what you cannot responsibly promise.

07 When energy is low, look at the work conditions as well as personal routines. What could be redesigned rather than endured?

08 A small action is useful when it serves a meaningful outcome. Choose a cue, a manageable behaviour and a way to learn from the attempt.

09 Procrastination deserves inquiry before judgement. Is the next step unclear, too large, emotionally difficult or blocked by a real constraint?

10 Practice belongs in real work. Choose one behaviour to rehearse and one person who can give you a specific observation afterwards.

Fifteen short educational posts

Three sets of five: introduce the work, support the practice, and review the learning. Adapt dates and contact details before publishing.

11 Progress is not only doing more. What could you simplify, stop or renegotiate to make the important work possible?

12 A useful review includes what did not change. What does the evidence suggest you should retain, adjust or stop?

13 Recognise contribution without exaggeration. Name what you did, who helped and what you learned.

14 The end of coaching should transfer ownership. Which questions, practices and relationships will support your next period?

15 Coaching is one form of support, not the answer to every need. An informed first conversation can help you decide whether coaching, specialist advice, training or organisational action is the right next step.

549 original coaching questions

Every entry links to an activity context. Select, listen and follow the client's meaning; do not interrogate.

001	What is the real question beneath the update?	ACE-A01
002	What would you prefer not to avoid today?	ACE-A01
003	What needs a different kind of support?	ACE-A01
004	What might the sponsor expect that the client has not agreed?	ACE-A02
005	Where could a dual role create a conflict?	ACE-A02
006	What should happen if coaching is not helping?	ACE-A02
007	What would a colleague actually see you doing differently?	ACE-A03
008	What part of the outcome is within your influence?	ACE-A03
009	What could improve for reasons unrelated to coaching?	ACE-A03
010	Which part of this goal feels chosen rather than imposed?	ACE-A04
011	What makes the effort worthwhile?	ACE-A04
012	What capability evidence do you already have?	ACE-A04
013	What are you protecting that deserves to be protected?	ACE-A05
014	What have you outgrown without acknowledging it?	ACE-A05
015	What success would not be worth its cost?	ACE-A05
016	What do you most want me to understand about your context?	ACE-A06
017	When have you learned best from another person?	ACE-A06
018	What would make this feel like someone else's agenda?	ACE-A06
019	What does a satisfying level mean to you in this domain?	ACE-A07
020	Where are you comparing yourself with someone else's standard?	ACE-A07
021	Which area affects the others most?	ACE-A07
022	Which chapter are you allowing to define the whole story?	ACE-B01
023	Where did you respond differently from the usual pattern?	ACE-B01
024	What support was present but easy to overlook?	ACE-B01
025	Which word sounds admirable but does not guide your choices?	ACE-B02

549 original coaching questions

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026	How would a colleague know that this value matters to you?	ACE-B02
027	Where do two good values pull in different directions?	ACE-B02
028	What did the satisfying experience allow you to express?	ACE-B03
029	What value may have been frustrated rather than absent?	ACE-B03
030	Which trade-off can you acknowledge openly?	ACE-B03
031	What does this image mean to you, rather than to me?	ACE-B04
032	Which detail seems most relevant today?	ACE-B04
033	Where does the metaphor stop being useful?	ACE-B04
034	What did you actually do that made a difference?	ACE-B05
035	What support deserves recognition?	ACE-B05
036	Which part can transfer and which cannot?	ACE-B05
037	Which quality was hardest to put aside temporarily?	ACE-B06
038	What did the situation make more important?	ACE-B06
039	What would overusing this quality look like?	ACE-B06
040	Would this statement help you say no to anything?	ACE-B07
041	What would others see if you lived it?	ACE-B07
042	Which phrase sounds borrowed rather than yours?	ACE-B07
043	What are you deliberately not pursuing this year?	ACE-C01
044	Which outcome depends on someone else's decision?	ACE-C01
045	What would make this plan unsustainable?	ACE-C01
046	What would be different on an ordinary Tuesday?	ACE-C02
047	Which change matters most to the rest?	ACE-C02
048	What are you assuming will become easier by itself?	ACE-C02
049	What might your future self thank you for starting now?	ACE-C03
050	Which part of the vision is yours and which is inherited?	ACE-C03

549 original coaching questions

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051	What could remain valuable across several possible futures?	ACE-C03
052	What are you hoping this achievement will give you?	ACE-C04
053	Could that need be met in another way?	ACE-C04
054	What might still be unresolved after success?	ACE-C04
055	Could another person understand what completion means?	ACE-C05
056	What behaviour could this target accidentally encourage?	ACE-C05
057	Which part requires learning before commitment?	ACE-C05
058	What mattered that is easy to overlook in the current role?	ACE-C06
059	Which imagined regret is useful information rather than a threat?	ACE-C06
060	What does this perspective suggest, but not prove?	ACE-C06
061	What would they describe you doing, not merely being?	ACE-C07
062	Whose perspective have you omitted?	ACE-C07
063	What would make the appreciation believable?	ACE-C07
064	Which claim in the article is currently least supported?	ACE-C08
065	Who deserves credit beyond you?	ACE-C08
066	What would a sceptical reader ask?	ACE-C08
067	What did you reject before giving it a fair hearing?	ACE-C09
068	What is attractive about the idea beneath its dramatic form?	ACE-C09
069	What would a safe miniature version look like?	ACE-C09
070	Which question changed how you understand the goal?	ACE-C10
071	What remains an assumption rather than a fact?	ACE-C10
072	What is the most important revision?	ACE-C10
073	Which reason remains when external approval is removed?	ACE-C11
074	Who may experience this goal differently from you?	ACE-C11
075	What cost are you minimising in your account?	ACE-C11

549 original coaching questions

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076	What is most likely to interrupt the plan?	ACE-C12
077	Will you recognise the cue when it occurs?	ACE-C12
078	Is the response small and specific enough to perform?	ACE-C12
079	Which requirement is verified and which is assumed?	ACE-C13
080	What experience would demonstrate readiness?	ACE-C13
081	Who can provide an informed view without promising an outcome?	ACE-C13
082	What do you need work to provide at this stage of life?	ACE-D01
083	Which condition is genuinely non-negotiable?	ACE-D01
084	What trade-off are you willing to make?	ACE-D01
085	Which rating has the strongest evidence?	ACE-D02
086	Which requirement needs verification?	ACE-D02
087	Is the gap one of skill, experience or access?	ACE-D02
088	What did you do that another person could observe?	ACE-D03
089	When does this strength become less helpful?	ACE-D03
090	What complementary behaviour does it need?	ACE-D03
091	Are you moving towards something or mainly away from something?	ACE-D04
092	What have you enjoyed in more than one context?	ACE-D04
093	Which possibility deserves evidence rather than fantasy?	ACE-D04
094	Is this truly internal, or is it a condition around you?	ACE-D05
095	Which entry is least supported?	ACE-D05
096	What combination suggests a useful move?	ACE-D05
097	What can you decide without asking permission?	ACE-D06
098	What can you request but not control?	ACE-D06
099	Which constraint needs organisational action?	ACE-D06
100	What pattern appears across examples, not only numbers?	ACE-D07

549 original coaching questions

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101	Where do different groups see different situations?	ACE-D07
102	What can you acknowledge without becoming defensive?	ACE-D07
103	How good do you actually need to be at this?	ACE-D08
104	Which part must remain your responsibility?	ACE-D08
105	What could a system or partnership solve?	ACE-D08
106	What do people reliably ask you to help with?	ACE-D09
107	What have you learned faster through practice?	ACE-D09
108	Which effective behaviour have you dismissed as ordinary?	ACE-D09
109	Which transition taught you most about how you work?	ACE-D10
110	What pattern disappears when the context changes?	ACE-D10
111	What opportunity did someone else make possible?	ACE-D10
112	Which possibility is attractive for its work rather than its status?	ACE-D11
113	What experience would keep several routes open?	ACE-D11
114	Which option is based on an untested assumption?	ACE-D11
115	What experience matters more than another certificate?	ACE-D12
116	How will you demonstrate the learning in work?	ACE-D12
117	Who can help without promising an appointment?	ACE-D12
118	Where does the calendar assume unlimited capacity?	ACE-D13
119	Which milestone depends on an earlier conversation?	ACE-D13
120	What can be moved without losing the purpose?	ACE-D13
121	What evidence have you gained rather than activity completed?	ACE-D14
122	What is blocked by access or timing?	ACE-D14
123	What can be simplified this fortnight?	ACE-D14
124	Which dimension matters most for your current challenge?	ACE-D15
125	What supports the rating besides confidence?	ACE-D15

549 original coaching questions

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126	Where do different stakeholders see different behaviour?	ACE-D15
127	What should people be able to do because of your contribution?	ACE-D16
128	Which behaviour communicates authority without closing dialogue?	ACE-D16
129	What feels authentic and effective rather than imitated?	ACE-D16
130	What would this quality look like in the next meeting?	ACE-D17
131	How could it be overdone?	ACE-D17
132	What small behaviour makes it credible?	ACE-D17
133	What data supports this entry?	ACE-D18
134	Which customer or stakeholder perspective is missing?	ACE-D18
135	What is the most consequential uncertainty?	ACE-D18
136	Who needs this information to make a better decision?	ACE-D19
137	What evidence makes the contribution credible?	ACE-D19
138	Who else should receive credit?	ACE-D19
139	What do you dismiss because it feels easy to you?	ACE-D20
140	What do others find difficult that you help clarify?	ACE-D20
141	Which behaviour appears in more than one example?	ACE-D20
142	What do you know and what are you inferring?	ACE-E01
143	What other explanation is plausible?	ACE-E01
144	What would you say to a colleague in the same situation?	ACE-E01
145	What makes this stretch useful rather than merely uncomfortable?	ACE-E02
146	What evidence suggests the load is too much or too little?	ACE-E02
147	What support would change the picture?	ACE-E02
148	What deserves resolution rather than release?	ACE-E03
149	What are you afraid would be lost by changing your response?	ACE-E03
150	What can you stop carrying without denying what happened?	ACE-E03

549 original coaching questions

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151	What is the message asking you to believe?	ACE-E04
152	What useful concern is hidden inside the harsh wording?	ACE-E04
153	What does the evidence actually support?	ACE-E04
154	What have you actually observed rather than assumed?	ACE-E05
155	What can be learned without copying the whole person?	ACE-E05
156	What would not fit your context?	ACE-E05
157	Which quadrant did you find hardest to complete?	ACE-E06
158	What cost of inaction had you overlooked?	ACE-E06
159	Where are you treating a possibility as certainty?	ACE-E06
160	What does the label hide about the actual behaviour?	ACE-E07
161	When might a related response be useful?	ACE-E07
162	What still needs to change?	ACE-E07
163	What does this perspective help you notice?	ACE-E08
164	What might the imagined mentor not understand about your context?	ACE-E08
165	What is your own judgement after considering the ideas?	ACE-E08
166	What is genuinely within your authority?	ACE-E09
167	Whose cooperation would change the situation?	ACE-E09
168	What concern needs collective rather than individual action?	ACE-E09
169	Where did this rule help you in the past?	ACE-E10
170	Is it required in every current situation?	ACE-E10
171	What exception already exists?	ACE-E10
172	Which item is repeatedly returning because it lacks a next step?	ACE-E11
173	What is not yours to solve alone?	ACE-E11
174	What can be parked with a review date?	ACE-E11
175	What part of the situation have you not yet described?	ACE-E12

549 original coaching questions

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176	When is the problem less present?	ACE-E12
177	What would someone with a different stake notice?	ACE-E12
178	Which option changes the situation rather than only your effort?	ACE-F01
179	What could you ask for instead of doing alone?	ACE-F01
180	Which small action would teach you most?	ACE-F01
181	What did you learn that the original plan did not anticipate?	ACE-F02
182	Did completing the action produce the intended benefit?	ACE-F02
183	What explains any gap between plan and attempt?	ACE-F02
184	What will reliably remind you to act?	ACE-F03
185	What is the smallest useful version?	ACE-F03
186	What makes the behaviour difficult on an ordinary busy day?	ACE-F03
187	Which part is unclear rather than large?	ACE-F04
188	What must happen before something else can start?	ACE-F04
189	What can be delegated or supported?	ACE-F04
190	Is this a task problem, a capacity problem or an emotional barrier?	ACE-F05
191	What are you protecting by delaying?	ACE-F05
192	What would make starting easier without pretending the task is enjoyable?	ACE-F05
193	What should be preserved while you change other things?	ACE-F06
194	What is a symptom rather than a cause?	ACE-F06
195	Which observation is most actionable?	ACE-F06
196	What is not completely stuck?	ACE-F07
197	When has the situation been slightly easier?	ACE-F07
198	What could you learn before solving the whole problem?	ACE-F07
199	Which part of the sentence removes choice that you actually have?	ACE-F08
200	What obligation is real and should remain visible?	ACE-F08

549 original coaching questions

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201	What wording feels accurate rather than motivational theatre?	ACE-F08
202	What must be known before the next step is safe?	ACE-F09
203	What support is missing beneath the plan?	ACE-F09
204	Which step is reversible?	ACE-F09
205	Which issue returns because nobody has made a decision?	ACE-F10
206	What are you tolerating for a legitimate reason?	ACE-F10
207	What small fix would release useful attention?	ACE-F10
208	What part of the explanation is a fact?	ACE-F11
209	What part is a pattern you could change?	ACE-F11
210	Does the commitment still matter?	ACE-F11
211	Which concern is loud rather than important?	ACE-G01
212	What consequence makes this a priority?	ACE-G01
213	What would happen if you did less elsewhere?	ACE-G01
214	What are you assuming about your capacity?	ACE-G02
215	Which outcome would make the week worthwhile?	ACE-G02
216	Where could a handover reduce overload?	ACE-G02
217	What does impact mean in this decision?	ACE-G03
218	Which estimate rests on the weakest evidence?	ACE-G03
219	What apparently easy action has a hidden cost?	ACE-G03
220	What important work currently receives only leftover time?	ACE-G04
221	What is the true duration including preparation?	ACE-G04
222	Which commitment cannot fit without a trade-off?	ACE-G04
223	What surprised you about the observed pattern?	ACE-G05
224	Which apparent waste was actually necessary coordination?	ACE-G05
225	Where does the system repeatedly create rework?	ACE-G05

549 original coaching questions

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226	Which interruptions prevent harm or delay?	ACE-G06
227	What do colleagues need that your current system does not provide?	ACE-G06
228	Where have you become an unnecessary decision bottleneck?	ACE-G06
229	Which entry is still a project rather than an action?	ACE-G07
230	What are you waiting for and who knows?	ACE-G07
231	Which unfinished item should be renegotiated rather than copied forward?	ACE-G07
232	Who would notice if this activity stopped?	ACE-G08
233	What valid need might be hidden inside an inefficient process?	ACE-G08
234	Which standard is higher than the situation requires?	ACE-G08
235	Which deadline is assumed rather than agreed?	ACE-G09
236	What important work becomes urgent because it is repeatedly postponed?	ACE-G09
237	Whose authority is needed to change ownership?	ACE-G09
238	What result are you genuinely willing to let someone else own?	ACE-G10
239	Where might your behaviour undermine the handover?	ACE-G10
240	What support would make the delegation developmental?	ACE-G10
241	What does the shape help you notice, without judging it?	ACE-H01
242	Which area matters most in this particular season?	ACE-H01
243	Where could one change help more than one area?	ACE-H01
244	What are you protecting with this boundary?	ACE-H02
245	What responsibility is genuinely yours?	ACE-H02
246	Where are you offering an alternative you cannot sustain?	ACE-H02
247	What behaviour are you reacting to rather than what label have you assigned?	ACE-H03
248	What explanation remains uncertain?	ACE-H03
249	Where could a clearer agreement improve the pattern?	ACE-H03
250	Which drain is unavoidable and which is unnecessarily repeated?	ACE-H04

549 original coaching questions

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251	What part of the situation has the greatest effect?	ACE-H04
252	What restores you without becoming another obligation?	ACE-H04
253	What do you need rather than what do you think you should need?	ACE-H05
254	Which need has been disguised as irritation or overwork?	ACE-H05
255	What request would another person be able to understand and act on?	ACE-H05
256	Which response best reflects a condition you would like to change?	ACE-H06
257	What gets in the way of a practice you already value?	ACE-H06
258	Which improvement requires organisational support?	ACE-H06
259	Who challenges you constructively rather than only reassuring you?	ACE-H07
260	Where are you expecting too much from one relationship?	ACE-H07
261	What support have you not asked for explicitly?	ACE-H07
262	Which useful activity do you enjoy less because of how it is organised?	ACE-H08
263	What enjoyable work may be crowding out a responsibility?	ACE-H08
264	Where could a change in method matter more than a change in task?	ACE-H08
265	What important dimension is missing?	ACE-H09
266	Are two spokes describing the same thing?	ACE-H09
267	What does a particular rating mean in observable terms?	ACE-H09
268	What did you notice that might otherwise have passed unnoticed?	ACE-H10
269	What made this experience meaningful to you?	ACE-H10
270	Where could appreciation be expressed specifically?	ACE-H10
271	What kind of enjoyment are you missing rather than what should you enjoy?	ACE-H11
272	Which ingredient could fit into ordinary life?	ACE-H11
273	What have you dismissed because it seems unproductive?	ACE-H11
274	What sort of company feels comfortable and meaningful to you?	ACE-H12
275	Where could repeated contact happen naturally?	ACE-H12

549 original coaching questions

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276	What expectation could make the first step unnecessarily difficult?	ACE-H12
277	What might this person say about working with you?	ACE-H13
278	Which expectation has never been made explicit?	ACE-H13
279	What evidence supports your view of the relationship?	ACE-H13
280	What work condition makes the largest difference to your engagement?	ACE-H14
281	Where is avoidable uncertainty consuming effort?	ACE-H14
282	What recovery opportunity is realistic during the day?	ACE-H14
283	What would make an ordinary day slightly more satisfying?	ACE-H15
284	Which idea is genuinely yours rather than a social expectation?	ACE-H15
285	How can the first experiment stay small?	ACE-H15
286	Which action required attention rather than money or status?	ACE-H16
287	How did you check that the help was welcome?	ACE-H16
288	Where could kindness include a clear boundary or fair decision?	ACE-H16
289	What would you be pleased to remember about this period?	ACE-H17
290	What expectation does not fit your circumstances?	ACE-H17
291	Which arrangement needs to be made early?	ACE-H17
292	What change in your usual functioning is most important to notice?	ACE-H18
293	What condition could be changed rather than endured?	ACE-H18
294	Who is appropriately placed to support you?	ACE-H18
295	Which observation feels most genuine rather than expected?	ACE-H19
296	What resource did you already have that you had not noticed?	ACE-H19
297	What appreciation could be communicated specifically?	ACE-H19
298	What is genuinely different rather than simply discussed more often?	ACE-I01
299	What has been less useful than you hoped?	ACE-I01
300	What explains the lack of movement on one priority?	ACE-I01

549 original coaching questions

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301	What contribution are you overlooking because it became routine?	ACE-I02
302	What did success cost that you do not want to repeat?	ACE-I02
303	Which lesson should change an actual choice next year?	ACE-I02
304	What should not be lost in the enthusiasm for a fresh start?	ACE-I03
305	Which change would make the others easier?	ACE-I03
306	What are you trying to change all at once?	ACE-I03
307	What learning has become part of how you work?	ACE-I04
308	Which change has the clearest evidence?	ACE-I04
309	What remains unfinished and deserves an honest place in the summary?	ACE-I04
310	What are you now better able to do without the coach?	ACE-I05
311	What early sign will tell you to seek support?	ACE-I05
312	What would you like to say about the way we have worked together?	ACE-I05
313	What have you minimised that deserves a fairer account?	ACE-I06
314	What was your contribution without claiming all the credit?	ACE-I06
315	How would you prefer to mark this progress?	ACE-I06
316	What made an introduction feel useful rather than performative?	ACE-J01
317	What did you learn by listening without advising?	ACE-J01
318	Which shared theme could help the group learn together?	ACE-J01
319	What meaning did you choose rather than receive from someone else?	ACE-J02
320	How does the image translate into behaviour?	ACE-J02
321	What stereotype should we avoid attaching to the metaphor?	ACE-J02
322	What assumption about a colleague became less certain?	ACE-J03
323	What made curiosity respectful rather than intrusive?	ACE-J03
324	How might wider experience contribute to the work?	ACE-J03
325	What evidence made the feedback credible?	ACE-J04

549 original coaching questions

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326	What contribution do you tend not to notice in yourself?	ACE-J04
327	Where does the feedback differ from your own view?	ACE-J04
328	How did the group establish shared understanding?	ACE-J05
329	What information was assumed rather than checked?	ACE-J05
330	Whose participation was made easier or harder by the rule?	ACE-J05
331	Which conversation went beyond finding a match?	ACE-J06
332	What difference was useful to understand?	ACE-J06
333	How did you avoid making assumptions about someone's experience?	ACE-J06
334	What learning became clearer when someone reflected it back?	ACE-J07
335	What did you notice about your own curiosity?	ACE-J07
336	How can unusual experience become useful rather than merely entertaining?	ACE-J07
337	What did writing make easier to acknowledge?	ACE-J08
338	Which sentence is an interpretation rather than a fact?	ACE-J08
339	What evidence would help you evaluate it?	ACE-J08
340	What clue did you rely on and how reliable was it?	ACE-J09
341	Which assumption came from the person's role or appearance?	ACE-J09
342	How quickly did confidence exceed evidence?	ACE-J09
343	Which statement tempted you into an absolute answer?	ACE-J10
344	What condition changed your view?	ACE-J10
345	How did you distinguish experience from general evidence?	ACE-J10
346	What became clearer when you had to choose words carefully?	ACE-J11
347	What important nuance did the short statement lose?	ACE-J11
348	Which word needs to become a behaviour?	ACE-J11
349	Which phrase concealed more than it explained?	ACE-J12
350	What respectful question clarified the meaning?	ACE-J12

549 original coaching questions

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351	When is shorthand helpful rather than evasive?	ACE-J12
352	Where did the group lose track of ownership?	ACE-J13
353	What happened when demand increased?	ACE-J13
354	Which process change mattered more than individual speed?	ACE-J13
355	What information disappears when we use a label?	ACE-J14
356	Which alternative explanation deserves checking?	ACE-J14
357	How could the label influence someone's opportunities?	ACE-J14
358	What became visible from another role's responsibilities?	ACE-J15
359	Which assumption are you most tempted to treat as fact?	ACE-J15
360	What would you need to ask the actual stakeholder?	ACE-J15
361	What did you learn from a position different from your own?	ACE-J16
362	Which condition mattered more than the headline statement?	ACE-J16
363	What made it easier or harder to change your mind?	ACE-J16
364	What makes the story more than an attractive slogan?	ACE-J17
365	Whose experience is missing from the headline?	ACE-J17
366	What difficult choice would have been necessary?	ACE-J17
367	What did you notice when you delayed giving advice?	ACE-J18
368	Where did your summary add an assumption?	ACE-J18
369	What made the speaker feel accurately understood?	ACE-J18
370	What changed when ideas were generated silently first?	ACE-J19
371	Which option was nearly lost because it sounded unusual?	ACE-J19
372	What criterion most influenced the choice?	ACE-J19
373	What difference between intention and outcome deserves attention?	ACE-J20
374	Which helpful behaviour can we repeat deliberately?	ACE-J20
375	What explanation are we accepting without evidence?	ACE-J20

549 original coaching questions

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376	What makes this learning useful in your actual role?	ACE-J21
377	What will you do rather than simply remember?	ACE-J21
378	Where might the application be harder than expected?	ACE-J21
379	What will you most need to remember when work becomes busy?	ACE-J22
380	What obstacle deserves a practical response now?	ACE-J22
381	How can the note be supportive rather than accusatory?	ACE-J22
382	What made the invitation feel genuinely optional?	ACE-M01
383	What helped you remain in control of the experience?	ACE-M01
384	What did you notice without judging it as good or bad?	ACE-M01
385	What part of the scene was easy or difficult to imagine?	ACE-M02
386	Where did your attention go when it wandered?	ACE-M02
387	Was the practice useful, neutral or unhelpful today?	ACE-M02
388	What did you notice about attention coming and going?	ACE-M03
389	Was it helpful to leave thoughts present rather than push them away?	ACE-M03
390	What real-world cue helped you return to the room?	ACE-M03
391	What did the distinction between observing and entering the current mean to you?	ACE-M04
392	Which pressure still requires action rather than simply acceptance?	ACE-M04
393	What choice became clearer during the pause?	ACE-M04
394	What part of the pause was genuinely supportive?	ACE-M05
395	What did you prefer to keep outside the exercise?	ACE-M05
396	What practical need deserves attention after the pause?	ACE-M05
397	Is the offer understandable without additional explanation?	ACE-N01
398	Could any wording imply a result you cannot promise?	ACE-N01
399	Is declining further coaching genuinely easy?	ACE-N01
400	Why would this connection be useful to both people?	ACE-N02

549 original coaching questions

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401	What competence or scope boundary should be clear?	ACE-N02
402	Where could a referral create a conflict of interest?	ACE-N02
403	Can the recipient understand exactly what is being charged?	ACE-N03
404	Does the invoice match the agreed service and rate?	ACE-N03
405	Which fields or tax treatment need professional verification?	ACE-N03
406	What evidence confirms that the payment was received?	ACE-N04
407	Is the receipt clearly linked to the correct invoice?	ACE-N04
408	Could any unnecessary financial or coaching information be removed?	ACE-N04
409	What uncertainty might a new client still have after reading this?	ACE-N05
410	Does the letter match the actual agreement?	ACE-N05
411	Is the preparation proportionate and optional where appropriate?	ACE-N05
412	Why is each field necessary for this engagement?	ACE-N06
413	What information could be kept out of the administrative record?	ACE-N06
414	Who genuinely needs access to this record?	ACE-N06
415	Can someone attend or receive coaching without subscribing?	ACE-N07
416	Is the communication frequency stated honestly?	ACE-N07
417	What evidence records the person's actual choice?	ACE-N07
418	What must participants be able to do after the session?	ACE-N08
419	Which access or hierarchy issue could reduce participation?	ACE-N08
420	What would you change if time or technology failed?	ACE-N08
421	Which feedback concerns relevance rather than facilitation style?	ACE-N09
422	What can the ratings not tell us about later application?	ACE-N09
423	Could a small group make a comment identifiable?	ACE-N09
424	What should this content help the reader do?	ACE-N10
425	Which claim needs evidence or more cautious wording?	ACE-N10

549 original coaching questions

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426	How can the material respect people who do not want coaching?	ACE-N10
427	What might a first-time client misunderstand about coaching?	ACE-N11
428	Which benefit is a possibility rather than a promise?	ACE-N11
429	What alternative service may be more appropriate in some cases?	ACE-N11
430	Which commitment would make the greatest difference to your experience of coaching?	ACE-N12
431	What does useful challenge look like for you?	ACE-N12
432	How will you tell the coach when the approach is not helping?	ACE-N12
433	Where do your personal preferences differ from what the business currently needs?	ACE-O01
434	Which outcome has the strongest evidence of customer value?	ACE-O01
435	What assumption could make the plan unworkable?	ACE-O01
436	Which past success has become an unquestioned rule?	ACE-O02
437	What external condition contributed to the result?	ACE-O02
438	What did the business learn that is not yet embedded in a process?	ACE-O02
439	Which item is genuinely internal and which is external?	ACE-O03
440	What evidence makes this more than the owner's opinion?	ACE-O03
441	Which interaction between quadrants matters most?	ACE-O03
442	What makes this a business capability rather than a personal talent?	ACE-O04
443	Where is the strength vulnerable to absence or growth?	ACE-O04
444	What must remain consistent as the business expands?	ACE-O04
445	What problem are you trying to solve rather than what label are you applying?	ACE-O05
446	Which cause is supported by evidence?	ACE-O05
447	What should the owner learn and what should the business obtain elsewhere?	ACE-O05
448	Which part of the vision is a preference and which is supported by demand?	ACE-O06
449	What capability must exist before the next milestone?	ACE-O06
450	What evidence would make you change direction?	ACE-O06

549 original coaching questions

Every entry links to an activity context. Select, listen and follow the client's meaning; do not interrogate.

451	Is the central issue a coaching need, a business-system problem or a specialist-advice need?	ACE-O07
452	What evidence would help us understand it more accurately?	ACE-O07
453	Who else has authority or a legitimate stake in the decision?	ACE-O07
454	What does the customer scene require that the operating scene does not yet provide?	ACE-O08
455	What is the owner still doing that would limit the future business?	ACE-O08
456	Which part of the vision depends on an untested assumption?	ACE-O08
457	How will we recognise a useful ending?	ACE-A01
458	What technology use needs separate agreement?	ACE-A02
459	What evidence would challenge our positive impression?	ACE-A03
460	What must change around you for action to be realistic?	ACE-A04
461	Whose expectations are most present in your answer?	ACE-A05
462	What should we check before choosing an exercise?	ACE-A06
463	What would one useful improvement look like?	ACE-A07
464	What belongs in the next chapter?	ACE-B01
465	Which word needs translation into your own language?	ACE-B02
466	How could you honour a value without demanding perfection?	ACE-B03
467	What real-world observation would help you test the insight?	ACE-B04
468	What evidence will show whether the behaviour works this time?	ACE-B05
469	Which quality needs a partner quality to work well?	ACE-B06
470	What tension must the statement acknowledge?	ACE-B07
471	What evidence would justify changing direction?	ACE-C01
472	What can begin within seven days?	ACE-C02
473	What evidence would change your view?	ACE-C03
474	What cost are you willing or unwilling to accept?	ACE-C04
475	What would count as useful progress short of the final result?	ACE-C05

549 original coaching questions

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476	What small action would honour the insight?	ACE-C06
477	How can you seek real feedback rather than rely on imagination?	ACE-C07
478	What can you test before committing to the whole story?	ACE-C08
479	What result would tell you not to continue?	ACE-C09
480	What must be learned before you commit further?	ACE-C10
481	What would make you reconsider?	ACE-C11
482	What would a sensible adjustment look like after a missed attempt?	ACE-C12
483	What could make this route valuable even without promotion?	ACE-C13
484	What are you assuming about the alternative?	ACE-D01
485	What would stronger evidence look like?	ACE-D02
486	Where could it create more value?	ACE-D03
487	What could you learn without making a major move?	ACE-D04
488	What would make this analysis outdated?	ACE-D05
489	What would make a next step safe enough?	ACE-D06
490	What specific change would respondents notice?	ACE-D07
491	What risk remains after the chosen strategy?	ACE-D08
492	Where would this capability create value next?	ACE-D09
493	What would you choose differently now?	ACE-D10
494	What do you need to learn before narrowing?	ACE-D11
495	What remains worthwhile if the role does not open?	ACE-D12
496	What needs protection during peak periods?	ACE-D13
497	What learning changes the next step?	ACE-D14
498	What would one practical improvement look like?	ACE-D15
499	How will you know the effect you actually had?	ACE-D16
500	Who can give useful feedback on the attempt?	ACE-D17

549 original coaching questions

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501	Who has authority to decide the next step?	ACE-D18
502	What barrier is structural rather than a communication issue?	ACE-D19
503	How could you test the hypothesis without overstating it?	ACE-D20
504	What action fits the evidence rather than the worst prediction?	ACE-E01
505	What would a sensible next level look like?	ACE-E02
506	What support would make the next step easier?	ACE-E03
507	How can you respond firmly without attacking yourself?	ACE-E04
508	How will you test whether the adaptation helps?	ACE-E05
509	What information could materially change the decision?	ACE-E06
510	What complementary behaviour would help?	ACE-E07
511	What should be checked with a real person?	ACE-E08
512	What would a proportionate use of attention look like?	ACE-E09
513	What small test would be informative without being reckless?	ACE-E10
514	What would make stopping work easier today?	ACE-E11
515	What is the smallest useful move available now?	ACE-E12
516	What will you deliberately not attempt yet?	ACE-F01
517	What should change in the next version?	ACE-F02
518	How will you resume after a missed opportunity?	ACE-F03
519	What is the smallest piece that creates useful progress?	ACE-F04
520	Should the task be changed or stopped?	ACE-F05
521	What needs investigation before action?	ACE-F06
522	Which move is small enough to take now?	ACE-F07
523	What action changes alongside the words?	ACE-F08
524	What would tell you to change the direction?	ACE-F09
525	Which issue is too structural for a private workaround?	ACE-F10

549 original coaching questions

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526	What would make the next agreement more honest?	ACE-F11
527	Who needs to understand the trade-off?	ACE-G01
528	What pattern from last week should change this plan?	ACE-G02
529	Which option could be redesigned rather than rejected?	ACE-G03
530	How will you protect this allocation respectfully?	ACE-G04
531	What small change would free the most useful attention?	ACE-G05
532	How will you know the new boundary is fair?	ACE-G06
533	What would make tomorrow's list more credible?	ACE-G07
534	How will you avoid merely passing the burden to someone else?	ACE-G08
535	What would prevent this crisis from recurring?	ACE-G09
536	How will you respond to a different but acceptable approach?	ACE-G10
537	What would a small worthwhile improvement look like?	ACE-H01
538	How could the response be both clearer and more respectful?	ACE-H02
539	Which situation requires support rather than a coaching experiment?	ACE-H03
540	Who can change the conditions you cannot change alone?	ACE-H04
541	What can be improved without waiting for everything to change?	ACE-H05
542	What would make the next step kind and realistic rather than another demand?	ACE-H06
543	How can this network remain reciprocal?	ACE-H07
544	How will you avoid transferring only unpleasant work to others?	ACE-H08
545	What can the wheel not tell us?	ACE-H09
546	What difficult reality still needs attention alongside this reflection?	ACE-H10
547	How could you protect this without creating another performance target?	ACE-H11
548	How will you respect another person's choice not to engage?	ACE-H12
549	What small reciprocal agreement could improve the work?	ACE-H13

499 original reflective lines

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001	A long list is an agenda-selection issue, not a reason to rush through several exercises.	ACE-A01
002	When the chosen topic conflicts with the contracted purpose, renegotiate before continuing.	ACE-A01
003	A client may choose reflection without an immediate action; agree what useful reflection would produce.	ACE-A01
004	Unresolved confidentiality or coercion means pause contracting rather than begin sensitive exercises.	ACE-A02
005	The sponsor's development interests do not create automatic access to coaching notes.	ACE-A02
006	A signed form does not replace ongoing consent or compliance with applicable law.	ACE-A02
007	Behaviour, experience and business outcomes are different evidence categories; keep them separate.	ACE-A03
008	Where no baseline exists, the first action is to collect a small baseline rather than invent a score.	ACE-A03
009	A goal should be renegotiated when role demands change, not preserved only for tidy reporting.	ACE-A03
010	Do not calculate a total readiness score or use cut-offs; domain means are descriptive discussion aids.	ACE-A04
011	Strong importance with weak conditions suggests a resource or system conversation, not a motivational speech.	ACE-A04
012	High confidence without examples calls for a small test of capability, not uncritical reassurance.	ACE-A04
013	Silence and uncertainty are legitimate results, not evidence that the client is unmotivated.	ACE-A05
014	Strong emotion does not automatically make a topic appropriate for coaching; check scope and readiness.	ACE-A05
015	Do not turn a metaphorical answer into a factual claim about the client.	ACE-A05
016	Keep hypotheses provisional; a first-session story is a perspective, not a complete organisational diagnosis.	ACE-A06
017	Where the sponsor and client disagree, address the contracting issue explicitly.	ACE-A06
018	If the need is outside coaching competence, discuss suitable referral or complementary support.	ACE-A06
019	Use domain scores individually; do not create a total wellbeing score.	ACE-A07
020	Changes in standards or circumstances can change ratings without a change in underlying experience.	ACE-A07
021	Low satisfaction is an invitation to listen and understand; it is not a diagnosis.	ACE-A07

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022	A recurring theme is a hypothesis for exploration, not proof of a fixed identity.	ACE-B01
023	Do not interpret gaps or omitted events; they may reflect privacy or relevance.	ACE-B01
024	Use a professional-only map when a broader life narrative is not wanted.	ACE-B01
025	Value priorities are contextual and may change; a card sort does not reveal an immutable essence.	ACE-B02
026	A claimed value without behavioural examples is a useful inquiry, not a reason to challenge the client's integrity.	ACE-B02
027	Avoid interpreting national, religious or occupational groups through a single values profile.	ACE-B02
028	Priority order is decision-specific; do not add scores to produce a moral ranking.	ACE-B03
029	A mismatch between values and current behaviour may reflect constraint, habit or competing commitments.	ACE-B03
030	The next step should test a value in action, not simply refine the vocabulary.	ACE-B03
031	An image is reflective material, not evidence of a hidden motive or external event.	ACE-B04
032	If the client does not experience images, use words, a neutral object or a written comparison.	ACE-B04
033	Retain only the meaning the client finds useful; no symbolic dictionary is needed.	ACE-B04
034	Confidence should be grounded in a specific capability and its conditions, not inflated into "I can do anything".	ACE-B05
035	A positive outcome can involve luck; separate controllable behaviour from external factors.	ACE-B05
036	If no example comes easily, start with a small competent moment or an observer's concrete example.	ACE-B05
037	The exercise reveals a choice made in a context, not a stable hierarchy of personal worth.	ACE-B06
038	The restore step matters: prioritising a quality does not mean rejecting the others.	ACE-B06
039	If forced choice feels unhelpful, use a flexible grouping instead of elimination.	ACE-B06
040	A useful statement is specific enough to influence behaviour but not so narrow that it becomes a job description.	ACE-B07
041	Do not judge the statement by elegance alone; test it against competing options.	ACE-B07
042	A business purpose statement should be checked with relevant stakeholders rather than treated as the owner's private truth.	ACE-B07
043	A plan is a set of choices, not a catalogue of aspirations.	ACE-C01

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044	Quarterly milestones may be learning milestones where uncertainty is high.	ACE-C01
045	Do not interpret an appropriate change of goal as failure.	ACE-C01
046	Use a desired future as a direction, not a prediction.	ACE-C02
047	Reduce the number of goals when the plan relies on unrealistic capacity.	ACE-C02
048	Track behaviour and conditions as well as whether the final outcome occurs.	ACE-C02
049	A distant vision should guide learning, not justify rigid commitments.	ACE-C03
050	An action with value across several futures is often safer than a large irreversible bet.	ACE-C03
051	Do not treat uncertainty as a lack of ambition.	ACE-C03
052	The underlying meaning is a client hypothesis, not a coach’s diagnosis.	ACE-C04
053	A status goal is not automatically shallow; explore what it represents.	ACE-C04
054	An alternative route can supplement rather than replace the original goal.	ACE-C04
055	SMART is a checking heuristic, not a psychometric or universally sufficient goal model.	ACE-C05
056	For complex new work, a learning goal may be more useful than a premature performance target.	ACE-C05
057	Do not attach a number merely to make a goal look rigorous.	ACE-C05
058	Treat the imagined future as reflective material, not a forecast or instruction.	ACE-C06
059	Do not use mortality or regret to pressure the client into a decision.	ACE-C06
060	A practical action should survive a check against current responsibilities.	ACE-C06
061	This is a values exercise, not evidence of what others actually think.	ACE-C07
062	Include stakeholders who may experience costs as well as benefits.	ACE-C07
063	Replace a broad reputation goal with a behaviour the client can practise.	ACE-C07
064	A compelling narrative is not a business case or proof of feasibility.	ACE-C08
065	Evidence requirements can become milestones in the action plan.	ACE-C08
066	The exercise is strongest when it includes uncertainty and collaboration, not only triumph.	ACE-C08
067	Interest is information, not a command to act.	ACE-C09
068	The evaluation phase is essential; creative freedom does not remove responsibility.	ACE-C09

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069	A small experiment can test an idea without declaring it the client's new life direction.	ACE-C09
070	Unanswered questions may identify a useful learning goal rather than invalidate the whole ambition.	ACE-C10
071	Do not add the number of satisfactory answers into a readiness score.	ACE-C10
072	A goal can be meaningful but poorly timed; timing is a legitimate decision.	ACE-C10
073	A convincing rationale acknowledges costs rather than trying to eliminate ambivalence.	ACE-C11
074	A sponsor's priority can be legitimate without becoming the client's only reason.	ACE-C11
075	The client may decide not to pursue the goal after clarification.	ACE-C11
076	An implementation plan supports action but does not remove structural barriers.	ACE-C12
077	A missed attempt is information about the plan, not a verdict on character.	ACE-C12
078	Avoid creating many competing if–then plans at once; start with one important obstacle.	ACE-C12
079	The map is a development plan, not a promise of appointment.	ACE-C13
080	A capability gap and an opportunity gap require different responses.	ACE-C13
081	Use real role criteria where available; avoid building the plan entirely around imagined expectations.	ACE-C13
082	Role fit is contextual and can change over time.	ACE-D01
083	Do not turn a values comparison into a numerical verdict that hides uncertainty.	ACE-D01
084	A change within the current role may address the issue more effectively than a move.	ACE-D01
085	Do not average the wheel into a readiness score.	ACE-D02
086	Opportunity access is not a personal competency; keep that distinction visible.	ACE-D02
087	Changes are interpretable only when dimensions and anchors remain comparable.	ACE-D02
088	A positive result does not prove a strength; look for repeated evidence and context.	ACE-D03
089	Distinguish enjoyment, skill and impact rather than assuming they always coincide.	ACE-D03
090	Development can involve using a strength differently, not only more often.	ACE-D03
091	A career hypothesis is not a commitment.	ACE-D04

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092	Dissatisfaction may arise from workload, management or governance rather than the profession itself.	ACE-D04
093	Include practical constraints without allowing them to censor all exploration.	ACE-D04
094	SWOT organises thinking; it does not calculate the correct decision.	ACE-D05
095	Avoid turning temporary limitations into identity labels.	ACE-D05
096	External constraints require influence, negotiation or adaptation, not self-blame.	ACE-D05
097	Agency is not the same as control over outcomes.	ACE-D06
098	A realistic request for support may be more useful than a private coping strategy.	ACE-D06
099	If the situation involves retaliation or harm, prioritise appropriate support and formal channels.	ACE-D06
100	Use 0–4 item means only when at least three valid other-ratings exist; otherwise summarise examples without a mean.	ACE-D07
101	Do not combine items into a leadership score or interpret self–other gaps as blind spots automatically.	ACE-D07
102	Small groups and detailed comments may remain identifiable; never guarantee anonymity.	ACE-D07
103	A development gap is not a global weakness of the person.	ACE-D08
104	Delegation is inappropriate when it evades a core accountability or shifts an unfair burden.	ACE-D08
105	The chosen response should match the consequence of error.	ACE-D08
106	An enjoyable activity is not necessarily a strength; seek evidence of effectiveness.	ACE-D09
107	A single compliment is a lead for inquiry, not a conclusion.	ACE-D09
108	Use the client’s language rather than assigning a type label.	ACE-D09
109	Do not equate promotion speed with capability or career quality.	ACE-D10
110	A repeated difficulty can arise from repeated context, not a fixed personal defect.	ACE-D10
111	Include caring responsibilities, mobility constraints or interrupted careers only when the client wishes.	ACE-D10
112	A map of options is not a commitment to pursue all of them.	ACE-D11
113	Access conditions may depend on organisational decisions, location or timing.	ACE-D11
114	Prefer information-rich, reversible exploration before major change.	ACE-D11

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115	Development activity is not evidence of learning until it changes capability or work.	ACE-D12
116	Do not count attendance at a course as completion of a behavioural outcome.	ACE-D12
117	Keep the plan distinct from a promise of promotion.	ACE-D12
118	A crowded grid is not a sign of ambition well managed.	ACE-D13
119	Differentiate fixed dates from provisional ones.	ACE-D13
120	Use the planner to make trade-offs visible, not to create guilt about unfinished ambitions.	ACE-D13
121	Movement across the board should reflect evidence, not optimism.	ACE-D14
122	A blocked action needs diagnosis of the barrier, not automatic escalation of effort.	ACE-D14
123	Keep fewer active commitments than the board can physically hold.	ACE-D14
124	Do not sum ratings or compare leaders using this wheel.	ACE-D15
125	A low rating can mean little opportunity to demonstrate a behaviour, not low capability.	ACE-D15
126	Use unchanged dimensions and anchors for meaningful personal review.	ACE-D15
127	Presence is relational and contextual, not a fixed charisma score.	ACE-D16
128	Avoid equating accent, extroversion, appearance or cultural style with leadership quality.	ACE-D16
129	Feedback should describe effect and behaviour rather than broad personal labels.	ACE-D16
130	Quality labels need behavioural definitions to become coachable.	ACE-D17
131	Aspirational language should not be mistaken for demonstrated capability.	ACE-D17
132	Progress can be uneven across situations; review context as well as effort.	ACE-D17
133	SWOT is an organising heuristic, not a substitute for market analysis or a business case.	ACE-D18
134	Keep the owner’s preferences separate from evidence about the business.	ACE-D18
135	A plausible option needs feasibility and risk review before implementation.	ACE-D18
136	Visibility should serve a purpose, not become constant broadcasting.	ACE-D19
137	Recognition is not wholly within the client’s control.	ACE-D19
138	Avoid advice that asks a person to compensate indefinitely for biased systems.	ACE-D19
139	Familiarity can hide capability, but ease alone does not prove effectiveness.	ACE-D20

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140	Use observer examples as evidence to examine, not unquestionable truth.	ACE-D20
141	A strength hypothesis remains provisional until tested across relevant situations.	ACE-D20
142	A pattern label is a prompt, not a diagnosis or proof that the concern is false.	ACE-E01
143	Where evidence supports a real problem, move to problem-solving, support or escalation.	ACE-E01
144	Do not argue the client out of their experience.	ACE-E01
145	The continuum is subjective and task-specific, not a stress or resilience test.	ACE-E02
146	Discomfort can signal learning, danger, exclusion or overload; explore before encouraging more stretch.	ACE-E02
147	A decision to reduce demand can be a sound development choice.	ACE-E02
148	Releasing rumination does not mean accepting mistreatment.	ACE-E03
149	Some commitments should be renegotiated rather than silently abandoned.	ACE-E03
150	A return of the thought is not failure; review the response and unresolved practical needs.	ACE-E03
151	The drawing is a metaphor, not a separate entity or evidence about mental health.	ACE-E04
152	The aim is a fairer response, not silencing every doubt.	ACE-E04
153	Retain valid information about preparation or risk while rejecting global self-judgement.	ACE-E04
154	A role model is a source of ideas, not an authority on every issue.	ACE-E05
155	Success may depend on context and privilege as well as behaviour.	ACE-E05
156	Choose a small, observable practice rather than a vague ambition to “be like” someone.	ACE-E05
157	The quadrants are a thinking aid, not a risk model or probability calculation.	ACE-E06
158	Avoid double-counting the same consequence under different wording.	ACE-E06
159	For high-stakes decisions, combine this with appropriate factual and professional analysis.	ACE-E06
160	A reframe is useful only if it improves accuracy and action.	ACE-E07
161	Do not relabel harmful conduct as a strength.	ACE-E07
162	A behaviour can be understandable and still require change.	ACE-E07
163	Imagined advice is a hypothesis, not actual expert guidance.	ACE-E08

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164	Use several perspectives when one admired person’s view dominates.	ACE-E08
165	The client remains responsible for the decision and for obtaining appropriate advice.	ACE-E08
166	The rings are contextual, not permanent facts.	ACE-E09
167	Influence is an attempt, not control over another person.	ACE-E09
168	A concern can remain important even when immediate action is limited.	ACE-E09
169	A rule can be partly true and still too rigid.	ACE-E10
170	Changing wording is not the same as changing behaviour; test the revised rule.	ACE-E10
171	Do not assume every barrier is internal when authority, access or bias may be involved.	ACE-E10
172	A long list may reveal workload beyond capacity, not poor personal organisation.	ACE-E11
173	Some concerns need support or a formal decision rather than another task entry.	ACE-E11
174	The aim is a trusted external record, not a permanently empty mind.	ACE-E11
175	A powerful question is useful because of its fit, not because it sounds dramatic.	ACE-E12
176	Repeated questioning can become pressure; slow down when the client needs space.	ACE-E12
177	An unresolved systemic issue may require diagnosis or action beyond coaching.	ACE-E12
178	Brainstorming produces options, not obligations.	ACE-F01
179	An action can be a conversation, observation or request, not only a task.	ACE-F01
180	Choose fewer actions than the client could theoretically complete.	ACE-F01
181	Completion is not the same as effectiveness.	ACE-F02
182	Do not label a missed action as lack of commitment without understanding the barrier.	ACE-F02
183	A decision to stop an unhelpful action can be a successful learning outcome.	ACE-F02
184	Repetition in context matters more than a dramatic initial effort.	ACE-F03
185	Do not use a streak as a measure of personal worth.	ACE-F03
186	An unsuitable cue or unrealistic behaviour should be redesigned rather than defended.	ACE-F03
187	Breaking down work does not create extra capacity; check total demand.	ACE-F04
188	A component may need a decision before it needs effort.	ACE-F04

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189	Avoid planning at a level of detail that becomes another form of avoidance.	ACE-F04
190	Delay can be a rational response to conflicting demands.	ACE-F05
191	A small start is a test, not a cure for every form of procrastination.	ACE-F05
192	Repeated difficulty may require support beyond a productivity technique.	ACE-F05
193	Not every frustration needs immediate correction.	ACE-F06
194	A useful stocktake includes strengths and resources, not only problems.	ACE-F06
195	Limit actions so that the review produces focus rather than another long list.	ACE-F06
196	The purpose is movement with learning, not forced positivity.	ACE-F07
197	A small move should not bypass an important safety or governance decision.	ACE-F07
198	If no safe move is available, seeking support can be the next step.	ACE-F07
199	Language can support reflection but cannot remove an external constraint.	ACE-F08
200	Avoid replacing a legitimate “cannot” with an unrealistic affirmation.	ACE-F08
201	The test is whether the wording supports clearer choice and behaviour.	ACE-F08
202	The metaphor does not mean any action is better than no action.	ACE-F09
203	A step should create useful progress or information.	ACE-F09
204	Do not draw a complete bridge merely to make uncertainty disappear visually.	ACE-F09
205	A toleration list is not a mandate to optimise every detail of life.	ACE-F10
206	Some irritations signal a role or process problem that deserves wider attention.	ACE-F10
207	Choose a few meaningful items rather than creating a second source of overwhelm.	ACE-F10
208	Accountability requires accurate explanation, not forced self-blame.	ACE-F11
209	A changed goal may be appropriate; record the reason rather than quietly abandoning it.	ACE-F11
210	Repeated barriers should change the design of the plan.	ACE-F11
211	One priority does not remove the others; it makes the immediate allocation of attention explicit.	ACE-G01
212	Urgency requires a real deadline or consequence, not merely a strong feeling.	ACE-G01
213	Revisit the decision when new information materially changes the consequences.	ACE-G01

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214	A full calendar is not evidence of a useful week.	ACE-G02
215	An unfinished outcome may reflect unrealistic allocation or dependency, not insufficient commitment.	ACE-G02
216	Compare planned and actual capacity before adding more priorities.	ACE-G02
217	The coordinates are estimates, not measurement precision.	ACE-G03
218	A low-effort action is not automatically worthwhile if it does not serve the chosen outcome.	ACE-G03
219	Safety, fairness and mandatory obligations can override the matrix.	ACE-G03
220	The exercise exposes capacity limits; it does not create extra hours.	ACE-G04
221	Calendar protection depends on authority, relationships and workload agreements.	ACE-G04
222	Repeated displacement is information about the system, not merely a failure of discipline.	ACE-G04
223	Two days are a sample, not a definitive account of the job.	ACE-G05
224	Low attention may reflect task conditions, fatigue or timing; do not infer a personal deficit.	ACE-G05
225	Avoid converting every human interaction into a productivity cost.	ACE-G05
226	The aim is reliable availability, not maximal isolation.	ACE-G06
227	A reduction in messages can hide unmet needs; ask colleagues about the effect.	ACE-G06
228	Repeated reassurance requests may indicate unclear authority or fear of mistakes.	ACE-G06
229	Completion counts are less important than contribution to the intended outcome.	ACE-G07
230	A waiting item needs a follow-up agreement, not repeated mental checking.	ACE-G07
231	Persistent carry-forward is a signal to change priority, design or ownership.	ACE-G07
232	An unpopular task can still be necessary.	ACE-G08
233	Stopping work is a governance decision when others rely on its output.	ACE-G08
234	Simplification may be safer and more useful than elimination.	ACE-G08
235	Urgency and importance are context-dependent; review them when circumstances change.	ACE-G09
236	Delegation is appropriate only with capability, authority and capacity.	ACE-G09
237	The matrix cannot settle conflicts between two legitimate priorities without further discussion.	ACE-G09

499 original reflective lines

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238	The delegating leader retains relevant accountability while transferring agreed work and authority.	ACE-G10
239	A capable person may still lack capacity or organisational access.	ACE-G10
240	Checkpoints should match risk, not the leader's discomfort with letting go.	ACE-G10
241	Do not average the spokes or interpret the area of the polygon as a wellbeing score.	ACE-H01
242	Ratings are personal and contextual; comparison between people is not meaningful.	ACE-H01
243	A low score is an invitation to inquire, not proof of a problem the coach should solve.	ACE-H01
244	A boundary is an agreement about behaviour or access, not a judgement of another person.	ACE-H02
245	Power differences may change what is safe and feasible.	ACE-H02
246	A thoughtful yes with changed scope can be a stronger boundary than an unrealistic no.	ACE-H02
247	A single difficult exchange does not define a person or relationship.	ACE-H03
248	The client's account is important but does not establish the other person's motives.	ACE-H03
249	Safety and dignity take priority over preserving a relationship at any cost.	ACE-H03
250	Self-reported energy varies with context and is not a clinical score.	ACE-H04
251	A recovery practice does not compensate indefinitely for harmful workload.	ACE-H04
252	Look for repeated conditions rather than drawing conclusions from one difficult day.	ACE-H04
253	Needs are not weaknesses or entitlements to any particular solution.	ACE-H05
254	A request is more actionable when it describes the condition required.	ACE-H05
255	Unmet organisational needs should not automatically become private self-care tasks.	ACE-H05
256	Do not compute a total score or apply high/low wellbeing categories.	ACE-H06
257	A two-item domain mean is provisional; with fewer than two responses leave it unscored.	ACE-H06
258	Higher frequency is not automatically better in every context; discuss the client's needs and constraints.	ACE-H06
259	A larger network is not necessarily a more supportive one.	ACE-H07
260	Different needs may require different people and professional services.	ACE-H07
261	Support quality should be judged through experience, not job title or status.	ACE-H07

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262	Enjoyment and contribution are separate dimensions.	ACE-H08
263	A low-engagement task may remain a legitimate responsibility.	ACE-H08
264	The map generates job-design hypotheses, not a recommendation to abandon the role.	ACE-H08
265	This is a locally designed reflective aid, not a validated scale.	ACE-H09
266	Do not compare scores between differently defined wheels.	ACE-H09
267	Changes in definitions prevent straightforward before-and-after comparisons.	ACE-H09
268	No quota of positive feeling is required.	ACE-H10
269	An entry is useful when it is personally meaningful, not impressive.	ACE-H10
270	Gratitude does not remove the need to address harm or unfairness.	ACE-H10
271	Enjoyment is personal and may change over time.	ACE-H11
272	A small activity can be worthwhile without becoming a career or income source.	ACE-H11
273	Lack of interest that is persistent or concerning may need a conversation beyond coaching.	ACE-H11
274	Connection quality matters more than the number of contacts.	ACE-H12
275	A declined invitation is not a reliable judgement of personal worth.	ACE-H12
276	Professional power relationships can complicate friendship and require care.	ACE-H12
277	The inventory records one perspective and should be tested through conversation.	ACE-H13
278	Trust is not a single trait; reliability and openness may differ by situation.	ACE-H13
279	A relationship improvement should benefit the shared work, not just the client’s convenience.	ACE-H13
280	Energy ratings are descriptive, not medical indicators.	ACE-H14
281	A work-design problem should not be reframed solely as individual resilience.	ACE-H14
282	Consider whether improved energy coincides with better judgement and sustainable delivery.	ACE-H14
283	Small improvements can be valuable without solving the larger problem.	ACE-H15
284	The client decides what counts as worthwhile.	ACE-H15
285	A modest action should not distract from a serious unresolved issue.	ACE-H15
286	Kindness is not measured by the number of boxes completed.	ACE-H16

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287	Unrequested help can be intrusive; consider the recipient's agency.	ACE-H16
288	A respectful difficult conversation may be kinder than avoiding necessary feedback.	ACE-H16
289	A meaningful season does not require travel or high expenditure.	ACE-H17
290	The plan should reflect the client's own priorities, not an idealised lifestyle.	ACE-H17
291	Changed circumstances may justify changing the plan.	ACE-H17
292	Common signs can have many causes and do not establish a diagnosis.	ACE-H18
293	A coach should not interpret physical symptoms or recommend treatment.	ACE-H18
294	Workload and organisational conditions deserve attention alongside individual coping.	ACE-H18
295	Five is a prompt, not a required score or completion standard.	ACE-H19
296	Appreciation and dissatisfaction can coexist.	ACE-H19
297	The value lies in attention and meaning, not in comparing lists.	ACE-H19
298	Progress can include a better decision to stop or change a goal.	ACE-I01
299	Client satisfaction is distinct from evidence of behaviour or organisational impact.	ACE-I01
300	Do not attribute all improvement to coaching without considering other causes.	ACE-I01
301	The review is not an objective performance rating.	ACE-I02
302	Achievements and wellbeing costs should be considered together.	ACE-I02
303	A priority is stronger when it follows from an explicit lesson or choice.	ACE-I02
304	This is a synthesis, not a requirement to complete every preceding worksheet.	ACE-I03
305	A smaller coherent set of changes is more useful than a long improvement list.	ACE-I03
306	Review the combined workload of the changes themselves.	ACE-I03
307	A highlight should connect to a specific example rather than a slogan.	ACE-I04
308	Not every valuable change is immediately visible in business metrics.	ACE-I04
309	The client's narrative and sponsor evidence may differ and should be discussed carefully.	ACE-I04
310	Closure can be appropriate even when some goals remain unfinished.	ACE-I05

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311	Further support may come from peers, managers or specialists rather than another coaching package.	ACE-I05
312	Feedback should be invited without pressure to be positive.	ACE-I05
313	Recognition does not require exceptional achievement.	ACE-I06
314	Specific evidence is more credible than global claims of greatness.	ACE-I06
315	Acknowledging others and acknowledging yourself are compatible.	ACE-I06
316	The hopes are starting points, not contractual promises of workshop outcomes.	ACE-J01
317	A participant who passes is still participating legitimately.	ACE-J01
318	Common themes should guide facilitation without erasing different needs.	ACE-J01
319	Metaphors are personal prompts, not evidence of stable traits.	ACE-J02
320	The same animal can mean different things to different people.	ACE-J02
321	The useful output is a behavioural intention, not the image itself.	ACE-J02
322	Surprise is not the objective at the expense of comfort.	ACE-J03
323	Sharing a personal detail does not create permission for later disclosure.	ACE-J03
324	The activity can broaden perspective but does not establish trust by itself.	ACE-J03
325	Positive feedback is still one person’s perspective.	ACE-J04
326	Specific examples are more useful than global praise.	ACE-J04
327	Do not infer a competency score from a short workshop exchange.	ACE-J04
328	The constraint is artificial and should not be over-generalised to workplace ability.	ACE-J05
329	Success depends on the chosen task and access conditions.	ACE-J05
330	The most useful learning concerns clarification and inclusion.	ACE-J05
331	Completion is not a measure of sociability or success.	ACE-J06
332	Participants can respond to a prompt in different legitimate ways.	ACE-J06
333	Names and notes should not be collected for marketing or unrelated use.	ACE-J06
334	The learning belongs to the speaker; the listener checks rather than interprets.	ACE-J07

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335	Ordinary experience may contain equally valuable learning.	ACE-J07
336	A memorable story is not proof of a general capability.	ACE-J07
337	Free writing can surface a perspective but does not validate it.	ACE-J08
338	The participant may keep the entire page private.	ACE-J08
339	A strong emotional response is a reason for care, not proof of accuracy.	ACE-J08
340	The exercise demonstrates uncertainty, not an ability to detect dishonesty.	ACE-J09
341	Correct guesses can occur by chance.	ACE-J09
342	Never generalise performance in the game to integrity or credibility.	ACE-J09
343	It depends is useful only when the relevant conditions are specified.	ACE-J10
344	The activity does not establish a universal management rule.	ACE-J10
345	Changing a view after considering evidence is a learning outcome, not a loss.	ACE-J10
346	A memorable phrase is not a complete strategy or assessment of purpose.	ACE-J11
347	Language fluency should not determine participation value.	ACE-J11
348	The useful outcome is the explanation and behavioural connection.	ACE-J11
349	The presence of a phrase does not prove poor thinking.	ACE-J12
350	Context and shared understanding determine whether shorthand works.	ACE-J12
351	Do not use the grid to embarrass colleagues or police accents and language fluency.	ACE-J12
352	The simulation is not a validated measure of team performance.	ACE-J13
353	An apparent improvement may reflect familiarity as well as the redesign.	ACE-J13
354	The debrief should focus on mechanisms the group can observe.	ACE-J13
355	A neutral description still requires accurate observation.	ACE-J14
356	Avoiding labels does not mean avoiding accountability for harmful behaviour.	ACE-J14
357	The activity does not diagnose bias in individual participants.	ACE-J14
358	Perspective-taking produces hypotheses, not mind-reading.	ACE-J15
359	People in the same role may have different views.	ACE-J15

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360	The strongest next step is often better consultation rather than a more elaborate imagined perspective.	ACE-J15
361	Visible agreement can reflect conformity or power as well as genuine belief.	ACE-J16
362	A changed position may indicate learning rather than inconsistency.	ACE-J16
363	The continuum is a discussion aid, not a vote unless that is explicitly agreed.	ACE-J16
364	All future quotations and outcomes are fictional until observed.	ACE-J17
365	A shared story can conceal disagreement; make differing assumptions visible.	ACE-J17
366	The useful output is a clearer direction and a testable next step.	ACE-J17
367	An accurate summary is checked by the speaker, not judged by the listener alone.	ACE-J18
368	Listening does not require agreement with every interpretation.	ACE-J18
369	The practice develops a behaviour; it does not certify counselling competence.	ACE-J18
370	The number of ideas is not the measure of quality.	ACE-J19
371	Voting can inform preference but does not replace decision authority or risk review.	ACE-J19
372	Keep rejected ideas available when conditions change.	ACE-J19
373	A useful debrief distinguishes process, result and context.	ACE-J20
374	A disappointing result can still yield valuable learning.	ACE-J20
375	The review is stronger when it changes a future action.	ACE-J20
376	A memorable idea is not yet a changed practice.	ACE-J21
377	The participant chooses the application; the facilitator should not assign one to make the event look effective.	ACE-J21
378	A small specific use is preferable to a broad promise.	ACE-J21
379	The note is a cue for reflection, not a guarantee of behaviour change.	ACE-J22
380	A changed context may justify revising the commitment.	ACE-J22
381	Private ownership can be more appropriate than facilitator follow-up.	ACE-J22
382	Not feeling calmer is not a failure.	ACE-M01

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383	A brief practice is not a treatment and should not be used to manage serious distress without appropriate support.	ACE-M01
384	The client's preference determines whether it is repeated.	ACE-M01
385	The experience is subjective and no calmness score is required.	ACE-M02
386	A wandering mind is ordinary and does not indicate failure.	ACE-M02
387	A neutral or unhelpful response is a valid reason not to repeat the practice.	ACE-M02
388	Imagery vividness is not a measure of skill or benefit.	ACE-M03
389	The practice may be useful as a transition but does not establish improved executive performance.	ACE-M03
390	Do not infer meaning from the details of the imagined scene.	ACE-M03
391	Observing pressure does not remove its practical causes.	ACE-M04
392	The metaphor should lead back to realistic choices and support.	ACE-M04
393	Do not use a calm appearance as evidence that a serious problem is resolved.	ACE-M04
394	A long practice is not inherently more effective than a short one.	ACE-M05
395	The client may stop at any stage and still have used the activity appropriately.	ACE-M05
396	A supportive experience should be distinguished from evidence of clinical or lasting change.	ACE-M05
397	The invitation is not evidence that coaching is appropriate for every recipient.	ACE-N01
398	A useful introductory outcome can be referral or no further engagement.	ACE-N01
399	Only record the minimum contact information needed.	ACE-N01
400	A referral network should not be judged only by volume.	ACE-N02
401	Referral fees or incentives require transparent handling and appropriate review.	ACE-N02
402	Do not infer consent from a public profile or a past client relationship.	ACE-N02
403	An invoice records a payment request, not proof of payment.	ACE-N03
404	The service description should be sufficient for billing without exposing confidential session content.	ACE-N03
405	Tax and currency treatment must be verified for the actual transaction.	ACE-N03
406	A receipt must reflect an actual received payment.	ACE-N04

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407	A partial payment should not be described as full settlement.	ACE-N04
408	Financial records and coaching notes should be kept appropriately separate.	ACE-N04
409	A warm welcome should not promise unconditional confidentiality where exceptions apply.	ACE-N05
410	The letter supports but does not replace informed contracting.	ACE-N05
411	Accessibility needs should be invited without requiring diagnosis disclosure.	ACE-N05
412	Completing a form does not itself establish informed consent.	ACE-N06
413	A sponsor contact is not automatically authorised to receive session information.	ACE-N06
414	Data minimisation should be designed before collection.	ACE-N06
415	A business card or event registration is not automatically permission for all future marketing.	ACE-N07
416	Consent and other lawful requirements depend on the actual context and jurisdiction.	ACE-N07
417	A clear preference record is more useful than a long contact list of uncertain origin.	ACE-N07
418	A smooth event is not the same as a useful learning outcome.	ACE-N08
419	Readiness includes participant conditions as well as facilitator preparation.	ACE-N08
420	Feedback and action ownership should be designed before the event.	ACE-N08
421	Do not compute a total quality score or claim validated cut-offs.	ACE-N09
422	Report the number of responses and missing items alongside any item summaries.	ACE-N09
423	Immediate intention to apply is not evidence that application occurred.	ACE-N09
424	Published content is educational and does not create a coaching relationship by itself.	ACE-N10
425	Original reflection lines are not quotations from named experts.	ACE-N10
426	Topic coverage is not equivalent to supplying every commercial graphic format.	ACE-N10
427	Coaching evidence at programme level does not validate every method or guarantee individual results.	ACE-N11
428	A clear explanation includes both benefits and limits.	ACE-N11
429	The client’s agency is central to the relationship.	ACE-N11
430	A charter is credible only when reflected in behaviour.	ACE-N12

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431	Warmth does not remove professional boundaries or necessary challenge.	ACE-N12
432	The client may question or revise expectations within the agreed scope.	ACE-N12
433	An attractive target is not evidence that the business can achieve it.	ACE-O01
434	Financial, legal and regulatory assumptions require appropriate professional review.	ACE-O01
435	The plan should remain revisable as evidence changes.	ACE-O01
436	Hindsight can make past decisions appear more obvious than they were.	ACE-O02
437	A successful outcome does not prove that every part of the decision was sound.	ACE-O02
438	The map should distinguish business patterns from personal identity judgements.	ACE-O02
439	SWOT is a structuring device, not a strategy by itself.	ACE-O03
440	Financial and market assumptions require verification.	ACE-O03
441	A long list can conceal the few issues that materially affect the decision.	ACE-O03
442	A founder’s skill can be an asset and a dependency at the same time.	ACE-O04
443	Customer praise is useful evidence but should be considered alongside consistency and outcomes.	ACE-O04
444	Scaling a strength may require a different process, not simply more effort.	ACE-O04
445	A weakness in one context may not matter in another.	ACE-O05
446	Outsourcing transfers work but does not automatically remove accountability or dependency.	ACE-O05
447	The response should match the consequence and business stage.	ACE-O05
448	A route map is a hypothesis about development, not a forecast.	ACE-O06
449	Disconfirming evidence can prevent expensive commitment.	ACE-O06
450	A business milestone should not depend on the owner sustaining an unrealistic workload.	ACE-O06
451	An owner’s account is a starting perspective, not a verified business diagnosis.	ACE-O07
452	Business and personal goals may conflict and should be made explicit.	ACE-O07
453	A coach should not imply expertise in every aspect of running a business.	ACE-O07
454	These are independently written function-based alternatives; the supplier’s three unpublished business scripts were not obtained.	ACE-O08

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455	The scenes should expose constraints as well as possibilities.	ACE-O08
456	No financial or commercial outcome is implied by a vivid vision.	ACE-O08
457	Before the next two sessions, complete the card in five minutes. Review whether agenda clarity improves the usefulness of the conversation.	ACE-A01
458	At session two, ask the client to explain the information-sharing agreement in their own words. Correct any mismatch immediately.	ACE-A02
459	Run the agreed behaviour in two comparable situations and bring one work artefact or observer example to the next session.	ACE-A03
460	Change one enabling condition this week and repeat only the relevant domain after two weeks, using the same goal and scale.	ACE-A04
461	Keep a brief observation log for seven days: situation, response and what the chosen question helps you notice.	ACE-A05
462	Agree one observation task relevant to the initial goal, and review the usefulness of the coaching approach at the next meeting.	ACE-A06
463	Revisit the selected domain after two weeks alongside a concrete record of the changed behaviour or condition.	ACE-A07
464	Write a five-sentence next-chapter description and identify one relationship or resource that would support it.	ACE-B01
465	For one week, note two decisions and which of your chosen values each decision expressed or compromised.	ACE-B02
466	Use the chosen value in one real decision; record the action, the cost accepted and the response you observed.	ACE-B03
467	Observe one situation linked to the metaphor and record whether the interpretation helps explain it or needs revision.	ACE-B04
468	Practise the transferable behaviour once before the live event and request feedback on that behaviour afterwards.	ACE-B05
469	Ask a trusted colleague for one example of the selected quality in your behaviour and one situation where it would help to express it more clearly.	ACE-B06
470	Use the statement in one real decision and record whether it changed the choice, the conversation or neither.	ACE-B07
471	At the end of the first month, compare planned and actual capacity and revise one assumption.	ACE-C01
472	Complete the first seven-day action and bring evidence of what it revealed about the plan.	ACE-C02

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473	Complete one low-risk exploration and record what it confirms, challenges and leaves unanswered.	ACE-C03
474	Hold one information-gathering conversation that tests an assumed link between the goal and its hoped-for benefit.	ACE-C04
475	Try the first behaviour once and revise the wording if the measure does not capture what matters.	ACE-C05
476	Complete one action connected to the chosen value within the next week and review how it fits real life.	ACE-C06
477	Ask one trusted colleague what behaviour most helps them and what you could do differently; compare this with the imagined contribution.	ACE-C07
478	Gather one piece of baseline evidence named in the article and revise the headline if necessary.	ACE-C08
479	Run a low-cost, reversible test and record interest, practical demands and feedback from those involved.	ACE-C09
480	Test the most uncertain assumption and update the goal before the next coaching review.	ACE-C10
481	Hold one conversation with an affected person or gather one fact about an assumed cost before finalising the decision.	ACE-C11
482	Use the cue-based response in three relevant situations and record what happened, including occasions when the cue was missed.	ACE-C12
483	Confirm one assumed requirement with an appropriate person and secure one practice opportunity.	ACE-C13
484	Test one important assumption through a role conversation or a short work observation.	ACE-D01
485	Collect one new work example for the selected dimension and review it against the same criterion.	ACE-D02
486	Apply one strength in a new situation and ask for feedback on both its benefit and its possible overuse.	ACE-D03
487	Conduct one informational conversation and record what you learned, what surprised you and what remains uncertain.	ACE-D04
488	Test the least certain high-impact entry and complete one action arising from a strategic pairing.	ACE-D05
489	Make one bounded request or take one authorised action and record the response without treating refusal as personal failure.	ACE-D06
490	Practise the selected behaviour for four weeks and ask the same observers for fresh examples using the same wording.	ACE-D07
491	Test the chosen strategy on one real task and review quality, effort and remaining dependency.	ACE-D08

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492	Gather two independent examples of the proposed strength and one example of a boundary or overuse risk.	ACE-D09
493	Use one pattern from the map to frame a question about the next role or assignment.	ACE-D10
494	Complete one exploration and redraw the map to reflect what is now known.	ACE-D11
495	Secure the first practice assignment and agree the evidence that will show learning.	ACE-D12
496	Review the next month’s commitments and remove or reschedule one avoidable collision.	ACE-D13
497	Complete one proof point and review it with the agreed observer within two weeks.	ACE-D14
498	Practise the chosen behaviour twice and bring examples from both the client and an observer.	ACE-D15
499	Ask two participants for one specific observation about clarity and room for contribution after the next meeting.	ACE-D16

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
W01	Client Reminder List	ACE-A01 · 020	ACT
W02	Coaching Agreement Contract TEMPLATE — Sample	ACE-A02 · 023; Agreement · 515	ACT
W03	Coaching Goals Worksheet	ACE-A03 · 026	ACT
W04	Life Map Template	ACE-B01 · 042	ACT
W05	Monthly Client Review and Feedback Form	ACE-I01 · 330	ACT
W06	Motivation Quiz	ACE-A04 · 029	ACT
W07	Powerful Pondering Questions Tool	ACE-A05 · 032	ACT
W08	Speedy Priority Finder — 5 Minute Exercise	ACE-G01 · 241	ACT
W09	Action Brainstorming Coaching Worksheet	ACE-F01 · 207	ACT
W10	Client Action Sheet Coaching TEMPLATE	ACE-F02 · 210	ACT
W11	Coaching Intake Session Checklist & Template	ACE-A06 · 035	ACT
W12	Complimentary Session Vouchers TEMPLATE	ACE-N01 · 437	ACT
W13	Create Your “My 50” Referral Team!	ACE-N02 · 441; 50-space register · 544	ACT
W14	Life Coaching Invoice TEMPLATE	ACE-N03 · 444	ACT
W15	Life Satisfaction Quiz & Coaching Exercise	ACE-A07 · 038	ACT
W16	Receipt Sample TEMPLATE	ACE-N04 · 447	ACT
W17	Sample Values List	ACE-B02 · 045; Values cards · 519	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
W18	Top 10 Cognitive Distortions List	ACE-E01 · 170	ACT
W19	Welcome Letter Sample TEMPLATE	ACE-N05 · 450	ACT
W20	Wheel of Life Template with Instructions	ACE-H01 · 272	ACT
B01	The Power of “No!” Workbook	ACE-H02 · 275	ACT
B02	Are You Sitting TOO Comfortably? Exercise	ACE-E02 · 173	ACT
B03	Detox Your Toxic Relationships Exercise!	ACE-H03 · 278	ACT
B04	Energy Zappers Coaching Exercise	ACE-H04 · 281	ACT
B05	Letting Go Exercise	ACE-E03 · 176	ACT
B06	Self-Care Check-in and Needs Review	ACE-H05 · 284	ACT
B07	Self-Care Quiz	ACE-H06 · 287	ACT
B08	Wheel of Life Template with Instructions	ACE-H01 · 272	ACT
B09	Balance & Self-Care Toolkit User Guide	Routes · 506	GUIDE
C01	Career Values Identification Workbook	ACE-D01 · 109	ACT
C02	Career Wheel — Get a Job or Promotion	ACE-D02 · 112	ACT
C03	Boost Your Strengths Exercise	ACE-D03 · 115	ACT
C04	Career Discovery Pondering Questions Sheet	ACE-D04 · 118	ACT
C05	Personal SWOT Exercise	ACE-D05 · 121	ACT

Inventory crosswalk

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SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
C06	Reclaim Your Power at Work Exercise	ACE-D06 · 124	ACT
C07	Simple 360 Feedback Exercise	ACE-D07 · 127	ACT
C08	Weakness Zapper! Coaching Exercise	ACE-D08 · 130	ACT
C09	25 Powerful Questions to Identify Strengths	ACE-D09 · 133; 25 questions · 523	ACT
C10	Career Coaching Toolkit User Guide	Routes · 506	GUIDE
V01	ANNUAL Goal-Setting Workbook	ACE-C01 · 066	ACT
V02	3 Month Vision Worksheet	ACE-C02 · 069	ACT
V03	Get Perspective Vision Worksheet	ACE-C03 · 072	ACT
V04	Goals Motivator — Find Your Hidden Treasure	ACE-C04 · 075	ACT
V05	Make Your Goals SMART	ACE-C05 · 078	ACT
V06	Rocking Chair and 2 Other Life Vision Exercises	ACE-C06 · 081; ACE-C07 · 085; ACE-C08 · 089	ACT
V07	Set Your Compass: Celebrate 2025 & Prepare for 2026	ACE-I02 · 333	ACT
V08	Wacky Wild Goal Brainstorming Tool	ACE-C09 · 093	ACT
V09	21 Questions to Extraordinary Goal-Setting	ACE-C10 · 096; 21 questions · 522	ACT
V10	Understand The Why of Your Goals	ACE-C11 · 099	ACT
V11	Vision & Goal-Setting Toolkit User Guide	Routes · 506	GUIDE
L01	Daily Success Habits Exercise	ACE-F03 · 213	ACT

Inventory crosswalk

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SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
L02	Eat Your Elephant Worksheet!	ACE-F04 · 216	ACT
L03	Identify Your Spark Team!	ACE-H07 · 290	ACT
L04	Love and Loathe List Exercise	ACE-H08 · 293	ACT
L05	Stop Procrastinating — Get It Done!	ACE-F05 · 219	ACT
L06	Take Stock and Take Action Worksheet!	ACE-F06 · 222	ACT
L07	Unstick Yourself Now! Worksheet	ACE-F07 · 225	ACT
L08	Weekly Success Planning Tool	ACE-G02 · 244	ACT
L09	BLANK Coaching Wheel	ACE-H09 · 296	ACT
L10	Life Coaching Toolkit User Guide	Routes · 506	GUIDE
T01	Action Priority Matrix Tool	ACE-G03 · 247	ACT
T02	Big Rocks and Little Rocks Exercise!	ACE-G04 · 250	ACT
T03	Expose Your Hidden Time Wasters Template	ACE-G05 · 253	ACT
T04	Get Motivated! What Words Inspire You to Action?	ACE-F08 · 228	ACT
T05	Interruptions Blaster! Workbook	ACE-G06 · 256	ACT
T06	New To Do List — Weekly Daily Task Planner	ACE-G07 · 259	ACT
T07	NOT To-Do List Exercise!	ACE-G08 · 262	ACT
T08	Urgent Important Matrix Template and Worksheet	ACE-G09 · 265	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
T09	Productivity & Time Management Toolkit User Guide	Routes · 506	GUIDE
D01	Personal Values Identification Workbook	ACE-B03 · 048; Values cards · 519	ACT
D02	Daily Gratitude Diary Template	ACE-H10 · 299	ACT
D03	Draw Out Your Gremlin Exercise	ACE-E04 · 179	ACT
D04	Intuition and Dream Symbol Exercise!	ACE-B04 · 051	ACT
D05	Peak Moment Exercise and Script	ACE-B05 · 055	ACT
D06	Role Model Confidence Boosting Exercise	ACE-E05 · 182	ACT
D07	Troll Travels — Who am I — Self-Discovery Exercise	ACE-B06 · 059; Qualities cards · 521	ACT
D08	What Makes My Heart Sing? Exercise	ACE-H11 · 302	ACT
D09	Self-Discovery Toolkit User Guide	Routes · 506	GUIDE
S01	3 Month Vision Worksheet	ACE-C02 · 069	ACT
S02	Daily Success Habits Exercise	ACE-F03 · 213	ACT
S03	Detox Your Toxic Relationships Exercise!	ACE-H03 · 278	ACT
S04	Energy Zappers Coaching Exercise	ACE-H04 · 281	ACT
S05	Letting Go Exercise	ACE-E03 · 176	ACT
S06	Stop Procrastinating — Get It Done!	ACE-F05 · 219	ACT
S07	Take Stock and Take Action Worksheet!	ACE-F06 · 222	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
S08	Spring Clean Your Life — Summary and Goals Sheet	ACE-I03 · 336	ACT
S09	Wheel of Life Template with Instructions	ACE-H01 · 272	ACT
S10	Spring Clean Your Life Toolkit User Guide	Routes · 506	GUIDE
M01	21½ Workshop Icebreakers & Exercises eBook	ACE-J01 · 349; through ACE-J22 · 412	BUNDLE
M02	Personal Mission Statement Generator Workbook	ACE-B07 · 062	ACT
M03	Build a Bridge Coaching Exercise	ACE-F09 · 231	ACT
M04	Expand Your Mind — Cartesian Questions	ACE-E06 · 185	ACT
M05	Love Your Weaknesses — Reframe Exercise	ACE-E07 · 188	ACT
M06	Mentor Magic Coaching Exercise	ACE-E08 · 191	ACT
M07	Nail That Goal!	ACE-C12 · 102	ACT
M08	Proactive Friend Finder	ACE-H12 · 305	ACT
M09	Spheres of Influence Coaching Exercise	ACE-E09 · 194	ACT
X01	What’s My Dream?	ACE-J01 · 349	ACT
X02	I’m a Pig! — Chinese Animals	ACE-J02 · 352	ACT
X03	Surprise Us!	ACE-J03 · 355	ACT
X04	How Others See Me!	ACE-J04 · 358	ACT
X05	Line Up! Communication Exercise	ACE-J05 · 361	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
X06	Tic-Tac-Toe Scavenger Hunt	ACE-J06 · 364	ACT
X07	Unusual Fact	ACE-J07 · 367	ACT
X08	Messages from Within	ACE-J08 · 370	ACT
X09	True or False?	ACE-J09 · 373	ACT
X10	True or False v2	ACE-J10 · 376	ACT
X11	7 Words	ACE-J11 · 379	ACT
X12	Catchphrase Bingo	ACE-J12 · 382	ACT
X13	Keep Your Balloons in the Air!	ACE-J13 · 385	ACT
X14	The Labels Game	ACE-J14 · 388	ACT
X15	Walking in Someone Else’s Shoes	ACE-J15 · 391	ACT
X16	Take a Stand!	ACE-J16 · 394	ACT
X17	Newspaper Visions!	ACE-J17 · 397	ACT
X18	I’m all Ears!	ACE-J18 · 400	ACT
X19	Action Brainstorming	ACE-J19 · 403	ACT
X20	Rearview Mirror	ACE-J20 · 406	ACT
X21	The Biggest Thing I Learned…	ACE-J21 · 409	ACT
X22	Note to Self	ACE-J22 · 412	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
E01	Coaching Goals Sheet	ACE-A03 · 026	ACT
E02	Intake Questions Sheet	ACE-A06 · 035	ACT
E03	Personal Life Map	ACE-B01 · 042	ACT
E04	Monthly Coaching Review Sheet	ACE-I01 · 330	ACT
E05	Monthly Action Sheet	ACE-F02 · 210	ACT
E06	Career History Map	ACE-D10 · 136	ACT
E07	Career Visioning Map	ACE-D11 · 139	ACT
E08	Visioning Exercises ×3	ACE-C06 · 081; ACE-C07 · 085; ACE-C08 · 089	ACT
E09	Career Vision into Action	ACE-C13 · 105	ACT
E10	3 Month Whole Life Vision	ACE-C02 · 069	ACT
E11	Annual Career Goals Planner	ACE-D12 · 142	ACT
E12	Career Goals Year-at-a-Glance	ACE-D13 · 145	ACT
E13	Quarterly Career Goals-at-a-Glance	ACE-D14 · 148	ACT
E14	Find the Why	ACE-C11 · 099	ACT
E15	NAIL that Goal	ACE-C12 · 102	ACT
E16	Personal SWOT Analysis	ACE-D05 · 121	ACT
E17	Boost Your Strengths	ACE-D03 · 115	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
E18	Weakness Zapper	ACE-D08 · 130	ACT
E19	Leadership Skills Wheel	ACE-D15 · 151	ACT
E20	Delegation Identifier	ACE-G10 · 268	ACT
E21	Mentor Magic	ACE-E08 · 191	ACT
E22	Stop Limiting Yourself!	ACE-E10 · 197	ACT
E23	Mission Statement	ACE-B07 · 062	ACT
E24	Career Values Workbook	ACE-D01 · 109	ACT
E25	Troll Travels Key Qualities	ACE-B06 · 059; Qualities cards · 521	ACT
E26	Unique Leadership Presence	ACE-D16 · 154	ACT
E27	Draw Out Your Gremlin	ACE-E04 · 179	ACT
E28	What To Let Go Of	ACE-E03 · 176	ACT
E29	Action Brainstorming	ACE-F01 · 207	ACT
E30	Qualities Boosting Exercise	ACE-D17 · 157	ACT
E31	Work Relationship Inventory	ACE-H13 · 308	ACT
E32	Urgent Important Matrix	ACE-G09 · 265	ACT
E33	Expose Your Hidden Time Wasters	ACE-G05 · 253	ACT
E34	Big Rocks Exercise	ACE-G04 · 250	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
E35	Action Priority Matrix Tool	ACE-G03 · 247	ACT
E36	Interruptions Blaster	ACE-G06 · 256	ACT
E37	Identify Tolerations Exercise	ACE-F10 · 234	ACT
E38	Daily Success Habits	ACE-F03 · 213	ACT
E39	Clear Your Monkey Mind Tool	ACE-E11 · 200	ACT
E40	Boost Your Energy at Work	ACE-H14 · 311	ACT
E41	No More Excuses	ACE-F11 · 237	ACT
E42	Wheel of Life	ACE-H01 · 272	ACT
E43	Self-Care & Needs Review	ACE-H05 · 284	ACT
E44	Energy Zappers Exercise	ACE-H04 · 281	ACT
E45	Speedy Priority Finder	ACE-G01 · 241	ACT
E46	Are you sitting TOO Comfortably?	ACE-E02 · 173	ACT
E47	What Makes My Heart Sing	ACE-H11 · 302	ACT
E48	Identify Your Spark Team	ACE-H07 · 290	ACT
E49	Spheres of Influence Exercise	ACE-E09 · 194	ACT
E50	Business SWOT Analysis	ACE-D18 · 160	ACT
E51	Visibility Builder	ACE-D19 · 163	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
E52	Career Goals Visioning Scripts ×3	ACE-C06 · 081; ACE-C07 · 085; ACE-C08 · 089	ACT
E53	Executive & Leadership Toolkit User Guide	Routes · 506	GUIDE
Q01	Annual Business Goals Planner	ACE-O01 · 478	ACT
Q02	Action Priority Matrix Tool	ACE-G03 · 247; Business notes · 540	ACT
Q03	Big Rocks Exercise	ACE-G04 · 250; Business notes · 540	ACT
Q04	Boost Your BUSINESS Strengths Tool	ACE-O04 · 487	ACT
Q05	Boost Your PERSONAL Strengths	ACE-D03 · 115; Business notes · 540	ACT
Q06	Business Goals QTRLY-at-a-Glance	ACE-O01 · 478; ACE-D14 · 148; Business notes · 540	ACT
Q07	Business Goals YEAR-at-a-Glance	ACE-O01 · 478; ACE-D13 · 145; Business notes · 540	ACT
Q08	Business History Map Tool	ACE-O02 · 481	ACT
Q09	BUSINESS SWOT Analysis	ACE-O03 · 484	ACT
Q10	Business Vision into Action	ACE-O06 · 493	ACT
Q11	BUSINESS Weakness Zapper	ACE-O05 · 490	ACT
Q12	Coaching Goals Sheet	ACE-A03 · 026; Business notes · 540	ACT
Q13	Coaching Review Sheet	ACE-I01 · 330; Business notes · 540	ACT
Q14	Daily Success Habits	ACE-F03 · 213; Business notes · 540	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
Q15	Delegation Identifier Tool	ACE-G10 · 268; Business notes · 540	ACT
Q16	Expose Your Hidden Time Wasters	ACE-G05 · 253; Business notes · 540	ACT
Q17	Intake Questions Sheet	ACE-O07 · 496	ACT
Q18	Interruptions Blaster	ACE-G06 · 256; Business notes · 540	ACT
Q19	Mentor Magic	ACE-E08 · 191; Business notes · 540	ACT
Q20	Mission Statement Generator	ACE-B07 · 062; Business notes · 540	ACT
Q21	Monthly Action Tracker	ACE-F02 · 210; Business notes · 540	ACT
Q22	NAIL that Goal	ACE-C12 · 102; Business notes · 540	ACT
Q23	PERSONAL SWOT Analysis	ACE-D05 · 121; Business notes · 540	ACT
Q24	PERSONAL Weakness Zapper	ACE-D08 · 130; Business notes · 540	ACT
Q25	Reclaim Your Energy at Work	ACE-H14 · 311; Business notes · 540	ACT
Q26	Urgent Important Matrix	ACE-G09 · 265; Business notes · 540	ACT
Q27	Visioning Exercises	ACE-O08 · 499	ACT
Q28	Weekly Daily To Do List Action Planner	ACE-G07 · 259; Business notes · 540	ACT
Q29	What Do You Need To Let Go Of?	ACE-E03 · 176; Business notes · 540	ACT
Q30	Tolerations Coaching Form	ACE-F10 · 234; Business notes · 540	ACT
Q31	Small Business Coaching Toolkit User Guide	Routes · 506	GUIDE

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
R01	Brighten up Your Life! Coaching Exercise	ACE-H15 · 314	ACT
R02	Coaching Goals Worksheet	ACE-A03 · 026	ACT
R03	3 Month Vision Worksheet	ACE-C02 · 069	ACT
R04	Daily Success Habits Exercise	ACE-F03 · 213	ACT
R05	Detox Your Toxic Relationships Exercise!	ACE-H03 · 278	ACT
R06	Energy Zappers Coaching Exercise	ACE-H04 · 281	ACT
R07	Identify Your Spark Team!	ACE-H07 · 290	ACT
R08	Letting Go Exercise	ACE-E03 · 176	ACT
R09	Take Stock and Take Action Worksheet!	ACE-F06 · 222	ACT
R10	What Makes My Heart Sing? Exercise	ACE-H11 · 302	ACT
R11	Monthly Client Review and Feedback Form	ACE-I01 · 330	ACT
R12	Next 3 Months Goal-Setting Worksheet	ACE-C02 · 069	ACT
R13	Renew YOU! Coaching Program — Highlights Sheet	ACE-I04 · 339	ACT
R14	Wrap-up Session Questions	ACE-I05 · 342	ACT
R15	Renew You Love Your Life Coaching Program — One Page Checklist	90-day plan · 510	GUIDE
R16	Renew YOU! Coaching Program — User Guide	90-day plan · 510	GUIDE
R17	Renew YOU! Coaching Program — Tool Inventory	90-day plan · 510	GUIDE

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
RM01	Printable POSTER	Programme copy · 566	CONTENT
RM02	Social Media GRAPHICS 1 to 5	Programme copy · 566	CONTENT
RM03	QUOTE Graphics for Weeks 1–13	Programme copy · 566	CONTENT
RM04	Marketing COPY	Programme copy · 566	CONTENT
RM05	QUOTES Text	Programme copy · 566	CONTENT
RM06	Sample Social Media POSTS	Programme copy · 566	CONTENT
SC01	January — Goals & Dreams	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC02	February — Energy, Focus & Love	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC03	March — Move Towards Happiness	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC04	April — Confidence	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC05	May — Benefits of Coaching	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC06	June — Authenticity	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC07	July — Balance & Self-Care	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC08	August — Inspiration & Taking Action	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC09	September — How to Succeed	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC10	October — Inner Strength	ACE-N10 · 467; Monthly cards · 549	CONTENT
SC11	November — Relationships	ACE-N10 · 467; Monthly cards · 549	CONTENT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
SC12	December — Let Go & Celebrate	ACE-N10 · 467; Monthly cards · 549	CONTENT
CQ01	January — Goal-Setting	499 lines · 597; Monthly cards · 549	CONTENT
CQ02	February — Kindness	499 lines · 597; Monthly cards · 549	CONTENT
CQ03	March — Life Spring Clean	499 lines · 597; Monthly cards · 549	CONTENT
CQ04	April — Leadership	499 lines · 597; Monthly cards · 549	CONTENT
CQ05	May — Confidence	499 lines · 597; Monthly cards · 549	CONTENT
CQ06	June — Creating Success	499 lines · 597; Monthly cards · 549	CONTENT
CQ07	July — Resilience	499 lines · 597; Monthly cards · 549	CONTENT
CQ08	August — Get Unstuck	499 lines · 597; Monthly cards · 549	CONTENT
CQ09	September — The Power of Coaching	499 lines · 597; Monthly cards · 549	CONTENT
CQ10	October — Diversity & Prejudice	499 lines · 597; Monthly cards · 549	CONTENT
CQ11	November — Motivation & Mindset	499 lines · 597; Monthly cards · 549	CONTENT
CQ12	December — Balance & Self-Care	499 lines · 597; Monthly cards · 549	CONTENT
CQ01a	Month 1: Quotes Text	499 lines · 597	CONTENT
CQ01b	Month 1: General User Guide	Content guide · 564	GUIDE
CQ01c	Month 1: Where to Add Your Logo	Content guide · 564	GUIDE
CQ02a	Month 2: Quotes Text	499 lines · 597	CONTENT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
CQ02b	Month 2: General User Guide	Content guide · 564	GUIDE
CQ02c	Month 2: Where to Add Your Logo	Content guide · 564	GUIDE
CQ03a	Month 3: Quotes Text	499 lines · 597	CONTENT
CQ03b	Month 3: General User Guide	Content guide · 564	GUIDE
CQ03c	Month 3: Where to Add Your Logo	Content guide · 564	GUIDE
CQ04a	Month 4: Quotes Text	499 lines · 597	CONTENT
CQ04b	Month 4: General User Guide	Content guide · 564	GUIDE
CQ04c	Month 4: Where to Add Your Logo	Content guide · 564	GUIDE
CQ05a	Month 5: Quotes Text	499 lines · 597	CONTENT
CQ05b	Month 5: General User Guide	Content guide · 564	GUIDE
CQ05c	Month 5: Where to Add Your Logo	Content guide · 564	GUIDE
CQ06a	Month 6: Quotes Text	499 lines · 597	CONTENT
CQ06b	Month 6: General User Guide	Content guide · 564	GUIDE
CQ06c	Month 6: Where to Add Your Logo	Content guide · 564	GUIDE
CQ07a	Month 7: Quotes Text	499 lines · 597	CONTENT
CQ07b	Month 7: General User Guide	Content guide · 564	GUIDE
CQ07c	Month 7: Where to Add Your Logo	Content guide · 564	GUIDE

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
CQ08a	Month 8: Quotes Text	499 lines · 597	CONTENT
CQ08b	Month 8: General User Guide	Content guide · 564	GUIDE
CQ08c	Month 8: Where to Add Your Logo	Content guide · 564	GUIDE
CQ09a	Month 9: Quotes Text	499 lines · 597	CONTENT
CQ09b	Month 9: General User Guide	Content guide · 564	GUIDE
CQ09c	Month 9: Where to Add Your Logo	Content guide · 564	GUIDE
CQ10a	Month 10: Quotes Text	499 lines · 597	CONTENT
CQ10b	Month 10: General User Guide	Content guide · 564	GUIDE
CQ10c	Month 10: Where to Add Your Logo	Content guide · 564	GUIDE
CQ11a	Month 11: Quotes Text	499 lines · 597	CONTENT
CQ11b	Month 11: General User Guide	Content guide · 564	GUIDE
CQ11c	Month 11: Where to Add Your Logo	Content guide · 564	GUIDE
CQ12a	Month 12: Quotes Text	499 lines · 597	CONTENT
CQ12b	Month 12: General User Guide	Content guide · 564	GUIDE
CQ12c	Month 12: Where to Add Your Logo	Content guide · 564	GUIDE
MD01	Find Calm — Guided Meditation Script eBook	ACE-M02 · 420; ACE-M03 · 424; ACE-M04 · 428; ACE-M05 · 432	SCRIPT
MD02	Introduction — MP3	ACE-M01 · 416	SCRIPT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
MD03	Waterfall — MP3	ACE-M02 · 420	SCRIPT
MD04	At the Ocean — MP3	ACE-M03 · 424	SCRIPT
MD05	Raging River — MP3	ACE-M04 · 428	SCRIPT
MD06	Healing River — MP3	ACE-M05 · 432	SCRIPT
MD07	Guided Meditation Scripts — Find Calm: User Guide	ACE-M01 · 416	SCRIPT
WH01	LIVE YOUR BEST LIFE — horizontal	ACE-N11 · 470; Content guide · 564	CONTENT
WH02	LIVE YOUR BEST LIFE — tall	ACE-N11 · 470; Content guide · 564	CONTENT
WH03	LIVE YOUR BEST LIFE — light square	ACE-N11 · 470; Content guide · 564	CONTENT
WH04	LIVE YOUR BEST LIFE — dark square	ACE-N11 · 470; Content guide · 564	CONTENT
WH05	COACHING IS A CREATIVE PARTNERSHIP — horizontal	ACE-N11 · 470; Content guide · 564	CONTENT
WH06	COACHING IS A CREATIVE PARTNERSHIP — tall	ACE-N11 · 470; Content guide · 564	CONTENT
WH07	WHY GET A COACH	ACE-N11 · 470; Content guide · 564	CONTENT
WH08	Why Hire a Coach? Social Media Graphics User Guide	ACE-N11 · 470; Content guide · 564	CONTENT
CH01	Overview of twelve affirmations	ACE-N12 · 474; Content guide · 564	CONTENT
CH02	Care beyond paid professional time	ACE-N12 · 474; Content guide · 564	CONTENT
CH03	Client expertise and resourcefulness	ACE-N12 · 474; Content guide · 564	CONTENT
CH04	Support through change and obstacles	ACE-N12 · 474; Content guide · 564	CONTENT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
CH05	Encouragement and belief	ACE-N12 · 474; Content guide · 564	CONTENT
CH06	Acceptance of the client's whole experience	ACE-N12 · 474; Content guide · 564	CONTENT
CH07	Focus on values and desired outcomes	ACE-N12 · 474; Content guide · 564	CONTENT
CH08	Experimentation and leaving the comfort zone	ACE-N12 · 474; Content guide · 564	CONTENT
CH09	Seeing strengths beyond self-criticism	ACE-N12 · 474; Content guide · 564	CONTENT
CH10	Mutual respect and acceptance	ACE-N12 · 474; Content guide · 564	CONTENT
CH11	A dedicated space for personal growth	ACE-N12 · 474; Content guide · 564	CONTENT
CH12	Accountability for agreed actions	ACE-N12 · 474; Content guide · 564	CONTENT
CH13	Self-trust, self-prioritisation and letting go	ACE-N12 · 474; Content guide · 564	CONTENT
CH14	Invitation to explore working with a coach	ACE-N12 · 474; Content guide · 564	CONTENT
LG01	Q1 — January–March	Monthly cards · 549; Content guide · 564	CONTENT
LG02	Q2 — April–June	Monthly cards · 549; Content guide · 564	CONTENT
LG03	Q3 — July–September	Monthly cards · 549; Content guide · 564	CONTENT
LG04	Q4 — October–December	Monthly cards · 549; Content guide · 564	CONTENT
LG03a	Monthly infographics	Monthly cards · 549	CONTENT
LG03b	Weekly coaching-question graphics	Monthly cards · 549	CONTENT
LG03c	Daily inspirational quote graphics	499 lines · 597	CONTENT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
LG03d	Saturday journalling prompts	Monthly cards · 549	CONTENT
LG03e	Sunday affirmations	Monthly cards · 549	CONTENT
LG03f	Social Media Graphics in a Box User Guide	Content guide · 564	CONTENT
LG03g	Quotes Text	499 lines · 597	CONTENT
LG03h	Where to Add Logo	Content guide · 564	CONTENT
FE01	Kindness Bingo Coaching Tool	ACE-H16 · 317	ACT
FE02	Best Summer Ever Coaching Worksheet	ACE-H17 · 320	ACT
FE03	Action Brainstorming Coaching Worksheet	ACE-F01 · 207	ACT
FE04	BLANK Coaching Wheel	ACE-H09 · 296	ACT
FE05	Business Coaching — Tolerations Coaching Form	ACE-F10 · 234; Business notes · 540	ACT
FE06	Create Your My 50 Referral Team	ACE-N02 · 441; 50-space register · 544	ACT
FE07	Effects of STRESS & Warning Signs	ACE-H18 · 323	ACT
FE08	Gratitude Coaching Exercise — 5 Things	ACE-H19 · 326	ACT
FE09	Life Satisfaction Quiz & Coaching Exercise	ACE-A07 · 038	ACT
FE10	Sample Values List	ACE-B02 · 045; Values cards · 519	ACT
FE11	Tolerations — Clear Your Mind	ACE-F10 · 234	ACT
FE12	Top 10 Cognitive Distortions List	ACE-E01 · 170	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
FE13	Understand The Why of Your Goals	ACE-C11 · 099	ACT
FE14	Wheel of Life Template with Instructions	ACE-H01 · 272	ACT
FE15	Wrap-up Session Questions	ACE-I05 · 342	ACT
FQ01	21 Questions to Extraordinary Goal-Setting	ACE-C10 · 096; 21 questions · 522	ACT
FQ02	25 Powerful Questions to Identify Strengths	ACE-D09 · 133; 25 questions · 523	ACT
FQ03	37 Coaching Questions to Liberate Your Clients!	ACE-E12 · 203; 37 questions · 525	ACT
FQ04	Wrap-up Session Questions	ACE-I05 · 342	ACT
FW01	Action Brainstorming Coaching Worksheet	ACE-F01 · 207; ACE-J19 · 403	ACT
FW02	Complimentary Session Vouchers TEMPLATE	ACE-N01 · 437	ACT
FW03	Effects of STRESS & Warning Signs	ACE-H18 · 323	ACT
FW04	Newsletter Sign-up Sheet	ACE-N07 · 457	ACT
FW05	Tic-Tac-Toe Icebreaker Exercise	ACE-J06 · 364	ACT
FW06	Workshop Action Recording Sheet	ACE-J19 · 403	ACT
FW07	Workshop Event CHECKLIST	ACE-N08 · 461	ACT
FW08	Workshop, Event & Seminar FEEDBACK Form	ACE-N09 · 464	ACT
FA01	Client Action Sheet Coaching TEMPLATE	ACE-F02 · 210	ACT
FA02	Client Info Sheet TEMPLATE	ACE-N06 · 454	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
FA03	Coaching Intake Session Checklist & Template	ACE-A06 · 035	ACT
FA04	Complimentary Session Vouchers TEMPLATE	ACE-N01 · 437	ACT
FA05	Create Your My 50 Referral Team	ACE-N02 · 441	ACT
FA06	Life Coaching Invoice TEMPLATE	ACE-N03 · 444	ACT
FA07	Newsletter Sign-up Sheet	ACE-N07 · 457	ACT
FA08	Receipt Sample TEMPLATE	ACE-N04 · 447	ACT
FA09	Welcome Letter Sample TEMPLATE	ACE-N05 · 450	ACT
FG01	Balance & Self-Care Toolkit User Guide	Routes · 506	GUIDE
FG02	Career Coaching Toolkit User Guide	Routes · 506	GUIDE
FG03	Executive & Leadership Toolkit User Guide	Routes · 506	GUIDE
FG04	Life Coaching Toolkit User Guide	Routes · 506	GUIDE
FG05	Productivity & Time Management Toolkit User Guide	Routes · 506	GUIDE
FG06	Self-Discovery Toolkit User Guide	Routes · 506	GUIDE
FG07	Small Business Coaching Toolkit User Guide	Routes · 506	GUIDE
FG08	Spring Clean Your Life Toolkit User Guide	Routes · 506	GUIDE
FG09	Vision & Goal-Setting Toolkit User Guide	Routes · 506	GUIDE
SP01	Acuerdo/Contrato de Coaching MODELO	ACE-A02 · 023	LANGUAGE

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
SP02	Hoja de Objetivos de Coaching	ACE-A03 · 026	LANGUAGE
SP03	Su Ficha de Reflexión	ACE-A05 · 032; ACE-F02 · 210	LANGUAGE
SP04	Mapa de la Vida Plantilla	ACE-B01 · 042	LANGUAGE
SP05	Hoja de Evaluación Mensual del Cliente	ACE-I01 · 330	LANGUAGE
SP06	Test de Motivación	ACE-A04 · 029	LANGUAGE
SP07	¿Cuáles Son Mis Prioridades? Un Ejercicio 5 Mins	ACE-G01 · 241	LANGUAGE
SP08	Hoja de Temas Para el Cliente PLANTILLA	ACE-A01 · 020	LANGUAGE
SP09	La Rueda de la Vida — Con Instrucciones	ACE-H01 · 272	LANGUAGE
SP10	Sesión Introductoria Lista de Verificación — Para Coach	ACE-A06 · 035	LANGUAGE
SP11	Hoja de Acciónes del Cliente	ACE-F02 · 210	LANGUAGE
SP12	Hoja de Datos del Cliente PLANTILLA	ACE-N06 · 454	LANGUAGE
SP13	Cupon de Regalo Sesión Gratis Plantilla	ACE-N01 · 437	LANGUAGE
SP14	Muestra de Factura MODELO	ACE-N03 · 444	LANGUAGE
SP15	Plantilla Modelo de Recibo de Pago	ACE-N04 · 447	LANGUAGE
SP16	Plantilla Modelo de Carta de Bienvenida	ACE-N05 · 450	LANGUAGE
N01	549 Powerful Coaching Questions eBook	549 questions · 575	CONTENT
N02	Coaching Tool to Identify Your Hidden Strengths	ACE-D20 · 166	ACT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
N03	499 Inspirational Quotes for Coaches eBook	499 lines · 597	CONTENT
N04	One Complete Week of Brandable Social Media Graphics for Coaches	ACE-N10 · 467; Sample week · 561; Content guide · 564	CONTENT
N05	Coaching Exercise Celebrate You!	ACE-I06 · 345	ACT
P01	Coaching Tools MEGAPack	Routes · 506	GUIDE
P02	Executive & Leadership Toolkit	Routes · 506	GUIDE
P03	Small Business Coaching Toolkit	Routes · 506; Business notes · 540	BUNDLE
P04	Renew You — Love Your Life 90-Day Program	90-day plan · 510	BUNDLE
P05	12 Months of Done-for-You Social Media Content	Monthly cards · 549; Content guide · 564	BUNDLE
P06	365 Days of Coaching Quote Graphics	499 lines · 597; Monthly cards · 549	BUNDLE
P07	Full Year Social Media Graphics — Canva	Monthly cards · 549	BUNDLE
P08	Calming Guided Meditation Toolkit	ACE-M01 · 416; ACE-M02 · 420; ACE-M03 · 424; ACE-M04 · 428; ACE-M05 · 432	BUNDLE
P09	Social Media Business Builder Set	ACE-N11 · 470; ACE-N12 · 474	BUNDLE
IG01	Set Your Goals!	ACE-C05 · 078; Monthly cards · 549	CONTENT
IG02	I Love Kindness!	ACE-H16 · 317; Monthly cards · 549	CONTENT
IG03	Feel Happier!	ACE-H11 · 302; ACE-H15 · 314; Monthly cards · 549	CONTENT
IG04	Be Confident	ACE-D03 · 115; ACE-E05 · 182; Monthly cards · 549	CONTENT

Inventory crosswalk

Source titles identify the earlier catalogue. ACE IDs identify original HR Delivery resources; page numbers refer to the master toolkit.

SOURCE	INVENTORIED RESOURCE	ORIGINAL RESOURCE / PAGE	TYPE
IG05	Be Authentic	ACE-B03 · 048; Monthly cards · 549	CONTENT
IG06	Why Hire A Coach	ACE-N11 · 470; Monthly cards · 549	CONTENT
IG07	Life Balance	ACE-H01 · 272; Monthly cards · 549	CONTENT
IG08	Feel Inspired	ACE-F01 · 207; Monthly cards · 549	CONTENT
IG09	Succeed In Life	ACE-C05 · 078; ACE-I01 · 330; Monthly cards · 549	CONTENT
IG10	Inner Strength	ACE-E07 · 188; ACE-E10 · 197; Monthly cards · 549	CONTENT
IG11	Be Thankful!	ACE-H10 · 299; ACE-H19 · 326; Monthly cards · 549	CONTENT
IG12	Celebrate You!	ACE-I06 · 345; Monthly cards · 549	CONTENT
BND01	ICW Social Media Kit Bundle	ACE-N11 · 470; ACE-N12 · 474; Monthly cards · 549; 499 lines · 597	BUNDLE
BND02	The Ultimate Coaching Tools Pack	Routes · 506; Monthly cards · 549	BUNDLE
CHG	Inside a Coach’s Heart — unitemised instruction manual	ACE-N12 · 474; Content guide · 564	GUIDE
V06a	Rocking Chair Life Vision Exercise	ACE-C06 · 081	ACT
V06b	Retirement Party Exercise	ACE-C07 · 085	ACT
V06c	Newspaper Article Writing Exercise	ACE-C08 · 089	ACT
HUB01	Coaching blog, events calendar and reader benefits/discounts	Scope · 002	HUB

Sources, scope and limitations

Research supports concepts and safeguards. It does not independently validate the original activities, item sets or scoring rules in this toolkit.

R01

International Coaching Federation (2025). ICF Code of Ethics.

Ethical reference: contracting, confidentiality, conflicts, technology and professional boundaries. The templates here are newly written, not ICF-approved contracts.

https://coachingfederation.org/credentialing/coaching-ethics/icf-code-of-ethics/

R02

Theeboom, Beersma & van Vianen (2014). Does coaching work? A meta-analysis.

Coaching-outcome evidence at programme level. It does not establish the efficacy of any individual worksheet in this book.

https://research.vu.nl/en/publications/does-coaching-work-a-meta-analysis-on-the-effects-of-coaching-on-/

R03

Locke & Latham (2002). Building a practically useful theory of goal setting and task motivation.

Goal-setting theory informs clarity, challenge, feedback and commitment. SMART is used here as a practical editing device, not as the tested intervention itself.

https://pubmed.ncbi.nlm.nih.gov/12237980/

R04

Gollwitzer & Sheeran (2006). Implementation intentions and goal achievement.

Supports specifying situational cues and intended responses. Effects depend on context; a written plan is not a guarantee of action.

https://doi.org/10.1016/S0065-2601(06)38002-1

Sources, scope and limitations

Research supports concepts and safeguards. It does not independently validate the original activities, item sets or scoring rules in this toolkit.

R05

Center for Self-Determination Theory. Basic Psychological Needs.

Autonomy, competence and relatedness inform exploration of motivation. The original reflective items here are not an SDT questionnaire.

https://selfdeterminationtheory.org/topics/application-basic-psychological-needs/

R06

Lally, van Jaarsveld, Potts & Wardle (2010). How are habits formed?

Repetition in a stable context informs habit planning. Do not promise that a habit will be established in a fixed number of days.

https://onlinelibrary.wiley.com/doi/10.1002/ejsp.674

R07

Schwartz (2012). An overview of the Schwartz theory of basic values.

Supports discussion of value priorities and tensions. No Schwartz scale or copyrighted questionnaire is reproduced.

https://scholarworks.gvsu.edu/orpc/vol2/iss1/11/

R08

Bandura (1977). Self-efficacy: toward a unifying theory of behavioural change.

Mastery evidence and credible models inform confidence work. Self-efficacy is task-specific; confidence is not proof of competence.

https://pubmed.ncbi.nlm.nih.gov/847061/

Sources, scope and limitations

Research supports concepts and safeguards. It does not independently validate the original activities, item sets or scoring rules in this toolkit.

R09

Emmons & McCullough (2003). Counting blessings versus burdens.

Experimental gratitude research informs optional noticing practices. Gratitude must not conceal harm, unfairness or unmet needs.

https://pubmed.ncbi.nlm.nih.gov/12585811/

R10

Sonnentag & Fritz (2007). The Recovery Experience Questionnaire.

Recovery concepts inform discussion of unwinding, choice and non-work activity. The published questionnaire is not reproduced.

https://pubmed.ncbi.nlm.nih.gov/17638488/

R11

Smither, London & Reilly (2005). Does performance improve following multisource feedback?

Feedback needs interpretation and follow-through. The original feedback questions in this toolkit are developmental prompts, not a validated 360 instrument.

https://onlinelibrary.wiley.com/doi/10.1111/j.1744-6570.2005.514_1.x

R12

Edmondson (1999). Psychological safety and learning behaviour in work teams.

Informs participation conditions and interpersonal risk. A workshop exercise alone cannot establish psychological safety.

https://dash.harvard.edu/entities/publication/13a7b031-0fdd-45ec-a7e0-2b80e2bc679f

Sources, scope and limitations

Research supports concepts and safeguards. It does not independently validate the original activities, item sets or scoring rules in this toolkit.

R13

NCCIH. Meditation and Mindfulness: Effectiveness and Safety.

Safety reference for optional attention practices. Stop when uncomfortable; do not use these scripts as a replacement for healthcare.

https://www.nccih.nih.gov/health/meditation-and-mindfulness-effectiveness-and-safety

R14

Health and Safety Executive. What are the Management Standards?

Work-design lens covering demands, control, support, relationships, role and change. Used conceptually, not as jurisdiction-specific legal advice.

https://www.hse.gov.uk/stress/standards/overview.htm

R15

Beck Institute (2021). Cognitive Model.

Supports separating situations, interpretations and responses. Coaching exercises do not constitute clinical CBT or a treatment protocol.

https://beckinstitute.org/wp-content/uploads/2024/05/Cognitive-Model.pdf

R16

Neff (2003). Self-compassion: an alternative conceptualisation of a healthy attitude toward oneself.

Informs constructive self-response after setbacks. No self-compassion scale is reproduced and no therapeutic outcome is promised.

https://self-compassion.org/wp-content/uploads/publications/SCtheoryarticle.pdf

Sources, scope and limitations

Research supports concepts and safeguards. It does not independently validate the original activities, item sets or scoring rules in this toolkit.

R17

Savickas. Career Construction Theory and Career Construction Counseling Manual (2019).

Narrative career perspective. The life and career maps here use independently written prompts, not a reproduction of the Career Construction Interview.

https://www.marksavickas.com/cct/

R18

Motivational Interviewing Network of Trainers. Understanding Motivational Interviewing.

Autonomy-supportive conversation, ambivalence and reflective listening. Reading the toolkit does not qualify a coach as an MI practitioner.

https://motivationalinterviewing.org/node/11216

R19

Grant (2012). Making positive change: solution-focused versus problem-focused coaching questions.

Informs the move from understanding a problem to considering resources and action. It does not justify ignoring structural causes or difficult feelings.

https://doi.org/10.1521/jsyt.2012.31.2.21

R20

Driskell, Copper & Moran (1994). Does mental practice enhance performance?

Task rehearsal is distinct from imagining success. The original imagery scripts pair rehearsal with practical preparation and feedback.

https://doi.org/10.1037/0021-9010.79.4.481

Sources, scope and limitations

Research supports concepts and safeguards. It does not independently validate the original activities, item sets or scoring rules in this toolkit.

R21

Wang, Wang & Gai (2021). A meta-analysis of mental contrasting with implementation intentions.

Desired outcomes are paired with realistic obstacles and cue-based plans. No published WOOP worksheet is reproduced.

https://pmc.ncbi.nlm.nih.gov/articles/PMC8149892/

R22

Kluger & DeNisi (1996). The effects of feedback interventions on performance.

Supports care with feedback attention and delivery. Feedback can be unhelpful; focus on specific behaviour and a usable next step.

https://doi.org/10.1037/0033-2909.119.2.254

Public catalogue and provenance

The earlier 24-page inventory was the coverage baseline. These publisher pages were used to clarify public purposes and collection structure, not to copy paid worksheets.

Complete library — public scope

https://www.thecoachingtoolscompany.com/products/the-complete-coaching-tools-library/

Welcome packet — public purposes

https://www.thecoachingtoolscompany.com/products/life-coaching-welcome-packet/

Career toolkit — public purposes

https://www.thecoachingtoolscompany.com/products/career-coaching-tools-value-pack/

Goal-setting toolkit — public purposes

https://www.thecoachingtoolscompany.com/products/extraordinary-goal-setting-tools-value-pack/

Self-discovery toolkit — public purposes

https://www.thecoachingtoolscompany.com/products/self-discovery-tools-value-pack/

Executive and leadership toolkit — public purposes

https://www.thecoachingtoolscompany.com/products/executive-leadership-toolkit/

Public catalogue and provenance

The earlier 24-page inventory was the coverage baseline. These publisher pages were used to clarify public purposes and collection structure, not to copy paid worksheets.

Small-business toolkit — public purposes

https://www.thecoachingtoolscompany.com/products/business-coaching-toolkit/

Workshop eBook — public contents

https://www.thecoachingtoolscompany.com/products/21-workshop-games-icebreakers-exercises/

Meditation kit — public scope

https://www.thecoachingtoolscompany.com/products/guided-meditation-script-kit-find-calm/

Renew YOU — public programme scope

https://www.thecoachingtoolscompany.com/products/renew-you-love-your-life-coaching-program-for-coaches/

Free coaching tools — public resource catalogue

https://www.thecoachingtoolscompany.com/free_coaching_tools/

Newsletter resources — public offer

https://www.thecoachingtoolscompany.com/launchpad-newsletter-sign-up/

Before using this toolkit at scale

Practitioner review

Have an appropriately qualified coach review scope, wording, facilitation and referral boundaries. Test the working agreement and administrative forms against the actual service and applicable requirements.

Pilot and revise

Pilot a small selection with consenting participants. Ask whether the instructions are clear, whether the activity feels relevant and respectful, and whether it leads to a usable next step. Record adverse or unhelpful responses, not only positive feedback.

Check measurement claims

Keep the original item sets labelled reflective. Any future psychometric use requires a separate development and validation programme, including construct definition, item review, reliability, validity, fairness and appropriate norms.

Check visual and language access

Print representative pages at actual size. Test PDF annotation and screen reading needs with users. Offer non-visual alternatives. Translation should involve qualified review, cultural adaptation and piloting rather than literal substitution alone.

Control versions and client data

Record the toolkit edition, activity ID and any adaptation used. Keep client responses in approved systems and define access and retention before collection. Do not treat this publication as authorisation for automated sensitive-data processing.

Production note

Version 1.0, prepared 12 October 2026. HR Delivery navy/teal palette and Montserrat display type are used. Source Sans Pro is the body-type fallback for the specified Source Sans 3 family. The masthead is typographic; no unverified logo artwork is presented as the approved original. All worked examples are fictional.