

Additional Coaching exercises

Purpose, values & goals

Begin with a clear agreement. Discover what matters. Choose a direction.

27

activities and practice resources

Coach guides, working pages,
results and debriefs

MASTER PAGES 001-107



Start with the person, not the programme

The first useful result of coaching is not a completed worksheet. It is a shared understanding of what the work is for.

A client may arrive with a clear ambition, a difficult decision or only the sense that something needs to change. This guide gives the coach several ways to begin without forcing that experience into a predetermined programme. The aim is to find a purpose that the client understands, values and can influence.

Begin by agreeing the relationship. Explore what the client expects, what a sponsor expects, what may be shared and what will remain private. A working agreement is a conversation before it is a document. Return to it whenever the focus, the people involved or the conditions of the engagement change.

The values and identity activities then offer language for choices that are often difficult to articulate. Invite the client to choose, reject or rename the words and metaphors. The task is not to discover a hidden label that explains the whole person. It is to clarify what matters in the situation being discussed and how that meaning appears in behaviour.

The goal and vision resources provide a bridge from reflection to direction. Give room to ambition, then ask what the ambition would require, who would be affected and what evidence could show that progress is being made. A compelling future picture is a starting point for inquiry, not a prediction or an obligation.

Use these pages selectively. A short agenda exercise may be enough for one meeting; a career-direction conversation may need several. The client should be able to adapt an exercise, leave a question unanswered or choose another route. The guide is there to support the relationship, not to take charge of it.

The standard for finishing is practical: a clearer purpose, a choice that belongs to the client and a sensible next step. Carry those decisions forward into the other guides, and return here when the direction needs to be reconsidered.

THE PRACTITIONER'S STANDARD

A considered beginning makes the next conversation more useful.

Introduction

This guide brings together the opening, values and goal-setting sections of the toolkit. It is designed for the beginning of an engagement, a change of coaching focus or a point at which an executive wants to reconsider what they are working towards. It can be used for a single conversation or as preparation for a longer programme.

01

Agree the work

Clarify purpose, boundaries, expectations and what evidence will make the engagement useful.

02

Understand what matters

Use life chapters, values, qualities and leadership purpose to explore the client's own priorities.

03

Choose a direction

Move from possible futures to a focused goal, a realistic commitment and a development route.

A SUGGESTED STARTING ROUTE

ACE-A06	The first-session discovery conversation	035
ACE-A03	Coaching outcomes and evidence map	026
ACE-B03	Values into everyday choices	048
ACE-C05	A clear and workable goal	078

For an existing client with a clear agreement, start with the question they bring rather than repeating intake. For a new engagement, settle the working agreement before using personal reflection or questionnaire material.

Using this guide

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

01 / Select for the purpose

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

02 / Facilitate and record

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

03 / Debrief and test

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

Participation and care

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

Evidence and ratings

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

Records and boundaries

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

FINDING A PAGE IN THE SPLIT EDITION

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

RELATED MATERIALS IN THE SUITE

GUIDE F	Working agreement drafting template	515
GUIDE F	Values and qualities cards	519
GUIDE F	Randomised questionnaires and item keys	527

The six-guide suite

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

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

ALL 652 MASTER PAGES ARE RETAINED

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

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

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

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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
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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

Mean: ____ n: ____

Importance

Mean: ____ n: ____

Capability

Mean: ____ n: ____

Conditions

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

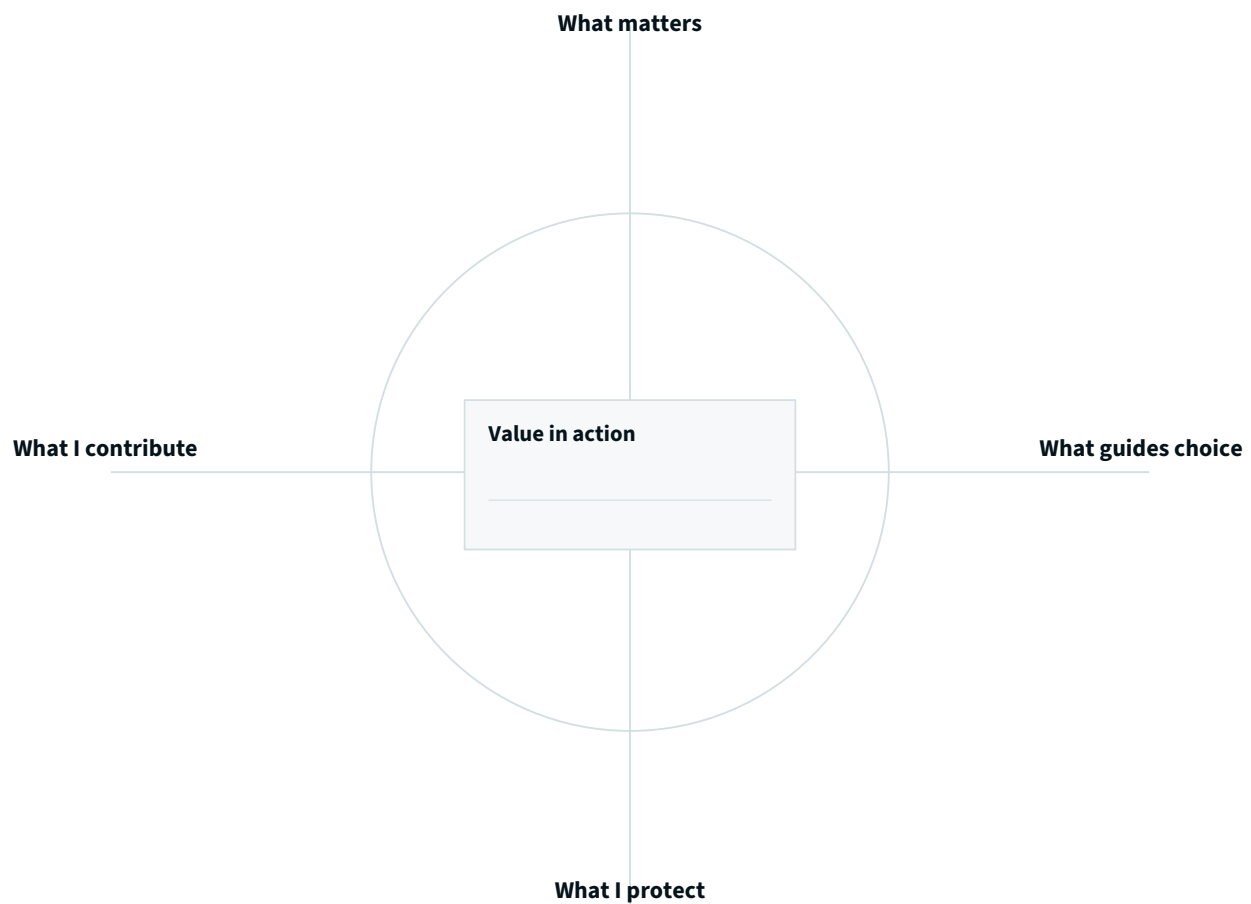
ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

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



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: _____

```

graph LR
    A[Stated goal] --> B[Expected benefit]
    B --> C[Underlying need or value]
    C --> D[Assumption to test]
  
```

Stated goal

Expected benefit

Underlying need or value

Assumption to 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

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.

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

Date: _____

Focus / question / goal: _____

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

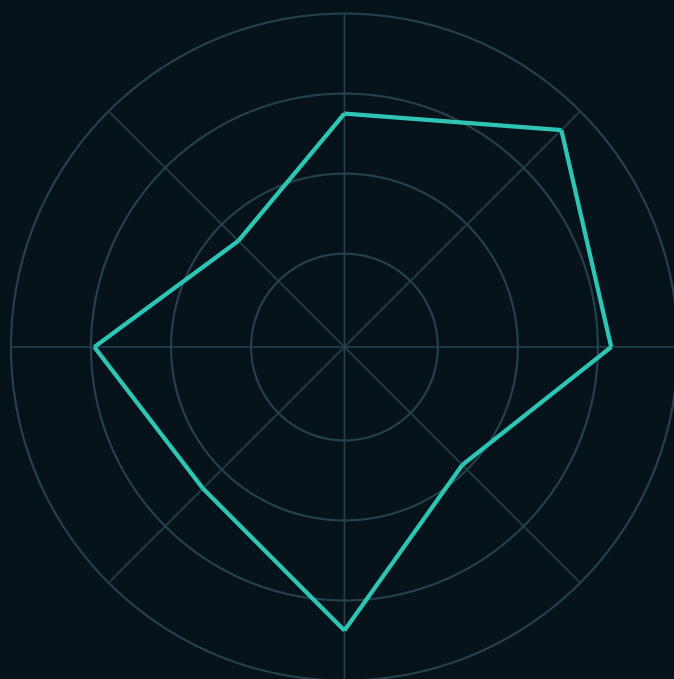
Additional Coaching exercises

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.

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

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Purpose, facilitation, safeguards and rating rules.	
Activity directory	011
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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	
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Activate / Apply	

Resources and reference

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

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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

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ACTIVITY		MIN	PAGE
I / Review, renewal and closure			
ACE-I01	Review progress without performing success	40	330
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

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