



HR DELIVERY
Making Sure HR Delivers

EXECUTIVE COACHING / GUIDE 04 OF 06

Activate

Framework & toolkit

Use skilled dialogue, visual exploration and rehearsal to support insight, choice and coachee-owned action.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

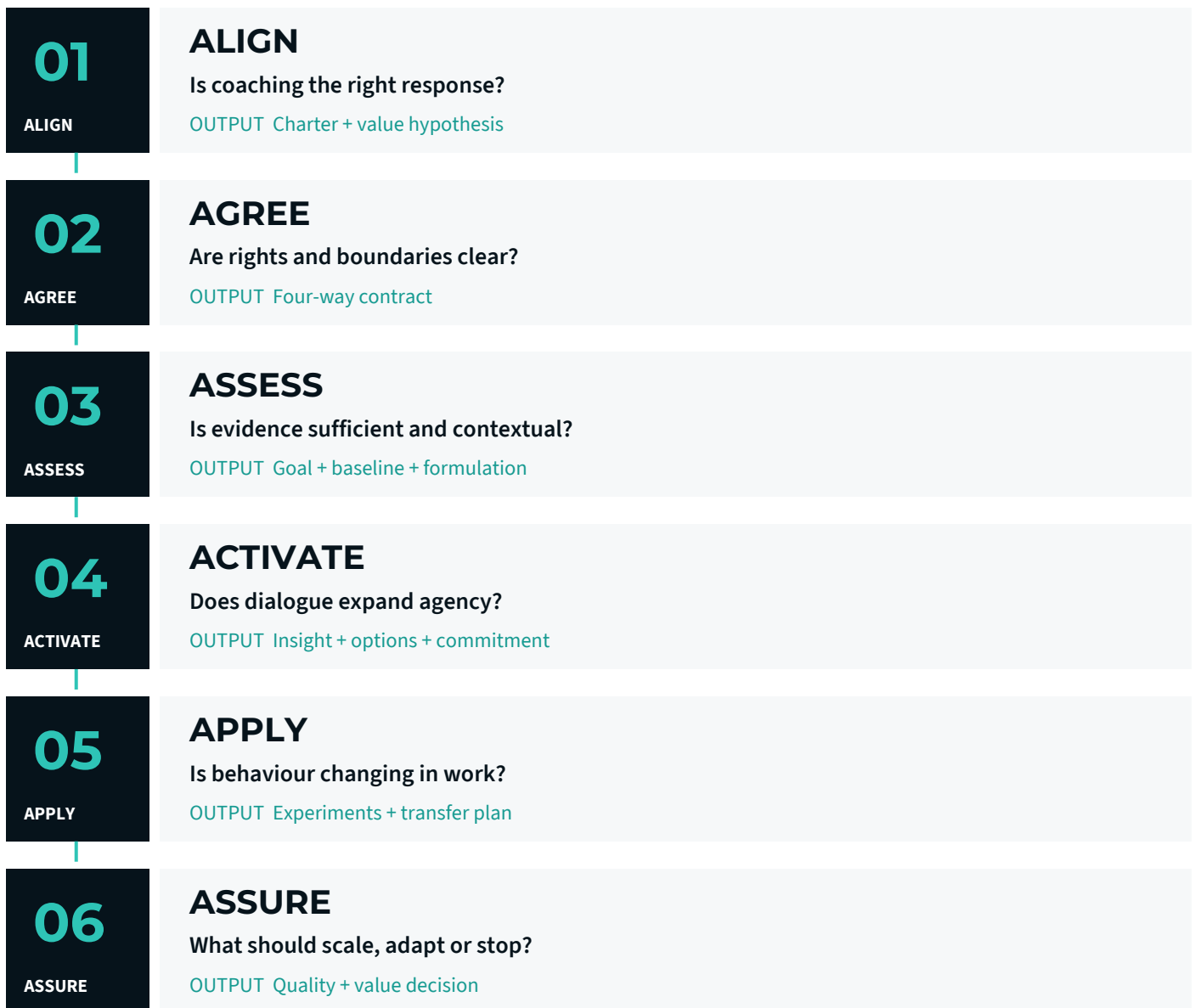
06 Assure

38 tools and activities | Complete guides, worksheets and examples

VISUAL PRACTICE EDITION / STANDALONE SERIES / OCTOBER 2026

Six connected responsibilities. One purposeful coaching journey.

Preserve the whole system. Return to an earlier A whenever the purpose, evidence, relationship or work conditions change.



ETHICAL | USEFUL | APPLIED | EVIDENCED

BASIS H01 pp.6-8 / H02 / H03 / H04 | New application layout; source terminology retained



The session sits inside a wider system.

Three operating levels and six enablers support every A. Assurance is continuous, not a final administrative step.

ORGANISATION

Policy, portfolio, culture, resources and governance. Leaders decide where coaching belongs and act on systemic barriers.

PROGRAMME

Population, pathways, matching, operations and evaluation. The owner provides fair access, suitable competence and a trustworthy service.

ENGAGEMENT

Contract, goals, sessions, application, review and closure. Coach and coachee agree the work and protect the relationship.

SIX ENABLING CONDITIONS

Enabler	Practical requirement
Strategic sponsorship	Purpose, boundaries and intended contribution.
Coach capability	Competence, observed practice, supervision and referral.
Culture and manager ecosystem	Time, trust, feedback and work opportunity.
Equity and access	Fair eligibility, matching and adjustments.
Data and technology	Minimum data, secure use and transparent responsibility.
Governance and improvement	Accountability, concerns, evaluation and renewal.

BASIS H01-H04 | These are enabling conditions, not six additional stages

ACTIVATE / INTRODUCTION

Turn the conversation towards choice.

What this guide is for

Activate contains the complete dialogue and choice section of the Visual Practice Edition. It includes the core conversation tools and X31-X54 activities, with guides, visual working sheets and fictional examples. The organising purpose is the coachee's awareness and agency, not the completion of a preferred coaching script.

Start with the agreed work

Bring the current coaching question, the relationship boundaries and relevant evidence from Assess. Listen for what needs attention now. A familiar model can structure the conversation, but the coach still needs to notice how the executive responds, check interpretations and adapt or stop an activity when it is not useful.

Choose a visual route deliberately

Use future scenes and scaling to clarify a desired change; perspectives and the inference ladder to examine meaning; a decision matrix, premortem or tension map to compare choices. Use dialogue sheets and rehearsal steps for feedback, boundaries, conflict or an ethical dilemma. The original methods and cautions remain beside each activity.

Challenge with permission

Separate observation from inference and offer interpretations as proposals the coachee may question. Keep work-development boundaries intact. Emotional intensity does not establish the quality of coaching, and an apparently powerful exercise is not a reason to exceed competence or the agreement.

Practise complete conversations

Three full session designs follow the tools: strategic decision coaching, a difficult conversation session, and pressure, assumptions and restart. Each retains its run sheet and annotated dialogue. Use them as adaptable routes and connect the chosen assignment to the corresponding worksheet rather than turning them into a performance script.

Before moving on

Use the Activate gate: does dialogue expand agency? Leave with insight, considered options and an owned commitment. Define what the executive wishes to try, what permission or support is needed and what remains uncertain. The Apply guide helps translate that choice into a bounded workplace experiment.

THE ACTIVATE DECISION

Does dialogue expand agency? Minimum output: Insight + options + commitment.

Based on the main manual: Activate practitioner brief and operating route, master pp. 294-295.

A FOREWORD PREPARED FOR DR PHILLIP WELSH

Make room for a different choice.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

A foreword for the Activate guide

A conversation, not a performance

A coach can ask a technically sound question and still miss what matters to the person in front of them. The work of Activate is to listen, notice, inquire and challenge in a way that opens useful choices. The model and the worksheet are supports for that work; they are not its purpose.

Use variety with intention

This guide offers several ways to explore a decision, test an assumption, imagine a different response or rehearse a difficult conversation. A visual map can make a tension easier to discuss. A matrix can expose the criteria behind a choice. A rehearsal can reveal a listening response that was absent from the executive's first plan. Select the approach because it serves the question.

Respect the right to disagree

Insight is not something the coach delivers to a compliant recipient. The coachee should be able to question an interpretation, decline a prompt and choose a different route. Support and challenge belong within that partnership. Where the work moves beyond the agreed purpose or the coach's competence, the appropriate response is to pause and use the relevant support.

Finish with ownership

My hope is that these tools help coaches combine imagination with discipline. Do not mistake an engaging session for changed behaviour. Ask what the executive has understood, what they now choose and what a real work opportunity could help them learn. A small, owned commitment gives the conversation somewhere useful to go after the session ends.

New foreword text prepared for review and approval; approval is required before publication under his name.



CONTENTS / THIS GUIDE

Find your way through Activate.

All page numbers on this contents page and in the new tool index refer to this guide.

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GUIDE / WORKSHEET / EXAMPLE

The original 38 tool identifiers and the visual activity designs are retained. Open the local index for the three pages of each tool.

READ THIS FIRST

One guide. The connected 6A system.

A smaller working volume, with the original content and visual activities retained.

Use local pages for this guide

The contents and tool index at the front use the new guide page numbers. Each retained page has two references in its footer: GUIDE is its position in this PDF; MASTER is its original page in the 606-page Visual Practice Edition.

Read retained references correctly

Numbers printed inside original directories, examples, session indexes and source notes have been retained. They refer to the master manual unless a different source is named. Use the local index for this guide, the original master index in Align for the full library, or Source_Page_Map.csv in the ZIP.

Open the complete tool

Choose an activity by its purpose. Read the guide, use the matching visual worksheet and study the fictional example. Original T and X identifiers have not changed. The working record is not an instruction to use every exercise or collect every possible item of information.

Keep the visual working formats

The wheels, maps, ladders, plots and charts are copied from the redesigned manual, not converted into text summaries. Type into the existing PDF fields in a compatible reader. Use its drawing tools or paper for plotted positions. The existing Designer Edition Excel workbook remains the numerical working companion.

Move between the six guides

Contents, Model and Tools in the footer return to this guide. Suite opens its six-volume locator. Links to another A point to the companion PDF. Extract all six PDFs into the same folder and keep their filenames; cross-file navigation depends on the PDF reader.

Protect the coaching relationship

Keep one engagement per authorised working copy and share only agreed outputs. Private reflection, assessment material and sponsor updates are not interchangeable. Refer to the retained contracting, privacy, pause and referral guidance. A standalone guide does not remove the need for the other 6A responsibilities.

Understand the source continuity

Every page of the 606-page main manual appears in at least one of the six guides. Shared foundations and references are repeated to support standalone use. Original whole-manual opening pages are retained in the Align archive. The new front matter provides orientation; it does not replace or re-score any source tool.

Choose the next useful step

Use the Activate gate: Does dialogue expand agency? Retain the evidence, the coachee's choice, the boundary and the next responsible owner. Return to another A when the purpose, agreement, evidence or work conditions change.



Open the guide. Use the worksheet.

These are local guide pages. Original tool identifiers are unchanged.

ID	Tool / activity	Guide	Sheet	Example
T37	Session planning canvas	017	018	019
T38	GROW conversation guide	020	021	022
T39	CLEAR conversation guide	023	024	025
T40	OSKAR solution-focused guide	026	027	028
T41	Powerful question planner	029	030	031
T42	Listening observation sheet	032	033	034
T43	Challenge with permission	035	036	037
T44	Values-to-choice map	038	039	040
T45	Assumption testing canvas	041	042	043
T46	Immunity-to-change map	044	045	046
T47	Decision quality canvas	047	048	049
T48	Difficult conversation rehearsal	050	051	052
T49	Feedback and feedforward planner	053	054	055

THE ACTIVATE DECISION

Does dialogue expand agency? Minimum output: Insight + options + commitment.



Open the guide. Use the worksheet.

These are local guide pages. Original tool identifiers are unchanged.

ID	Tool / activity	Guide	Sheet	Example
T50	Session close and commitment	056	057	058
X31	Describe the preferred future	059	060	061
X32	Find the useful exception	062	063	064
X33	Scaling and one step better	065	066	067
X34	Perspective positions	068	069	070
X35	Weighted decision comparison	071	072	073
X36	Premortem for a leadership experiment	074	075	076
X37	Strategic zoom	077	078	079
X38	Both-and tension map	080	081	082
X39	Event, interpretation and choice	083	084	085
X40	Distanced self-talk for a work decision	086	087	088
X41	Compassionate challenge after a setback	089	090	091
X42	Ambivalence conversation	092	093	094

THE ACTIVATE DECISION

Does dialogue expand agency? Minimum output: Insight + options + commitment.



Open the guide. Use the worksheet.

These are local guide pages. Original tool identifiers are unchanged.

ID	Tool / activity	Guide	Sheet	Example
X43	Ladder of inference check	095	096	097
X44	Competing commitments inquiry	098	099	100
X45	Courage through graded rehearsal	101	102	103
X46	Difficult conversation rehearsal	104	105	106
X47	Negotiation interests and boundaries	107	108	109
X48	Conflict response choice	110	111	112
X49	SBI feedback rehearsal	113	114	115
X50	Ask for feedforward	116	117	118
X51	Boundary-setting and saying no	119	120	121
X52	Ethical dilemma rehearsal	122	123	124
X53	Metaphor as a thinking aid	125	126	127
X54	Future leadership identity in practice	128	129	130

THE ACTIVATE DECISION

Does dialogue expand agency? Minimum output: Insight + options + commitment.



THE 6A WORKPLACE COACHING SYSTEM

04

Activate

Dialogue should expand choice

THE GATE

Does dialogue expand agency?

MINIMUM OUTPUT

Insight + options + commitment

38 TOOLS & ACTIVITIES

[Open the stage tool directory >](#)



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ACTIVATE / TOOL DIRECTORY

Activate: tools to use

Directory 1 of 3 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T37	Session planning canvas	296	297	298
T38	GROW conversation guide	299	300	301
T39	CLEAR conversation guide	302	303	304
T40	OSKAR solution-focused guide	305	306	307
T41	Powerful question planner	308	309	310
T42	Listening observation sheet	311	312	313
T43	Challenge with permission	314	315	316
T44	Values-to-choice map	317	318	319
T45	Assumption testing canvas	320	321	322
T46	Immunity-to-change map	323	324	325
T47	Decision quality canvas	326	327	328
T48	Difficult conversation rehearsal	329	330	331
T49	Feedback and feedforward planner	332	333	334

BEFORE YOU MOVE ON

Does dialogue expand agency? Complete or revisit: Insight + options + commitment.

BASIS H04 / Original HR Delivery executive activities | Every tool has a guide, form and worked page



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ACTIVATE / TOOL DIRECTORY

Activate: tools to use

Directory 2 of 3 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T50	Session close and commitment	335	336	337
X31	Describe the preferred future	338	339	340
X32	Find the useful exception	341	342	343
X33	Scaling and one step better	344	345	346
X34	Perspective positions	347	348	349
X35	Weighted decision comparison	350	351	352
X36	Premortem for a leadership experiment	353	354	355
X37	Strategic zoom	356	357	358
X38	Both-and tension map	359	360	361
X39	Event, interpretation and choice	362	363	364
X40	Distanced self-talk for a work decision	365	366	367
X41	Compassionate challenge after a setback	368	369	370
X42	Ambivalence conversation	371	372	373

BEFORE YOU MOVE ON

Does dialogue expand agency? Complete or revisit: Insight + options + commitment.

BASIS H04 / Original HR Delivery executive activities | Every tool has a guide, form and worked page



01 Align

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ACTIVATE / TOOL DIRECTORY

Activate: tools to use

Directory 3 of 3 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
X43	Ladder of inference check	374	375	376
X44	Competing commitments inquiry	377	378	379
X45	Courage through graded rehearsal	380	381	382
X46	Difficult conversation rehearsal	383	384	385
X47	Negotiation interests and boundaries	386	387	388
X48	Conflict response choice	389	390	391
X49	SBI feedback rehearsal	392	393	394
X50	Ask for feedforward	395	396	397
X51	Boundary-setting and saying no	398	399	400
X52	Ethical dilemma rehearsal	401	402	403
X53	Metaphor as a thinking aid	404	405	406
X54	Future leadership identity in practice	407	408	409

BEFORE YOU MOVE ON

Does dialogue expand agency? Complete or revisit: Insight + options + commitment.

BASIS H04 / Original HR Delivery executive activities | Every tool has a guide, form and worked page



01 Align

02 Agree

03 Assess

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05 Apply

06 Assure

ACTIVATE / THE PRACTITIONER BRIEF

Dialogue should expand choice

Activate is the skilled conversation at the heart of coaching. The model provides a place for different methods, not a script that every session must follow. Choose an activity because it serves the coachee's question, explain its purpose, obtain agreement and adapt to what emerges. A thoughtful pause may be more useful than another technique. [H01, H04]

Contract the session afresh

Ask what would make this session worthwhile and what has changed. The engagement goal provides direction without forbidding a relevant new question. Agree the scope and available time, then choose a method that fits the task and the coachee's preferences.

Listen before structuring

Use the coachee's language, summarise and check meaning. Ask questions that open inquiry rather than hide advice. When offering an observation, separate what you noticed from the interpretation and invite correction. Do not use a model to steer the person to your preferred conclusion.

Choose the right depth

Work-focused perspective-taking, assumptions review and rehearsal can be powerful without forced personal disclosure. Emotion may be acknowledged, but the coach must stay within competence. Stop, pause or refer when an activity moves beyond the agreement or appropriate professional scope.

Generate options before closing

Explore alternatives, exceptions, interests and consequences. Distinguish a decision requiring authority from an issue that can be tested. A weighted matrix is a judgement aid, not a proof; an evocative metaphor is not evidence. Include the option of seeking further information or not acting yet.

Practise the difficult moment

Translate insight into a sentence, question, decision routine or interaction. Rehearse a plausible response, pause, give specific feedback and repeat with one adjustment. Do not caricature the other person or make the rehearsal an exercise in winning a conflict.

End with owned action or deliberate reflection

Ask what the coachee has learned and chosen. Check feasibility, support, consequences and the next opportunity. No action can be legitimate when a question needs time or a formal decision. The coach should not manufacture a commitment merely to finish the worksheet.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ACTIVATE / OPERATING ROUTE

Choose the next useful move.

These routes are practical suggestions, not a requirement to complete every tool.

01

Open a useful session

T37, T38, T39, X14 / Contract, GROW or CLEAR

02

Find possibilities

T40, X31, X32, X33 / Future, exceptions and scaling

03

Examine interpretations

X27, X34, X39, X43, X44 / Evidence, perspectives and assumptions

04

Make a choice

X35, X36, X37, X38, X52 / Options, risk, system and ethics

05

Rehearse the interaction

X45-X51 / Challenge, feedback, conflict and boundaries

GATE REVIEW

Does dialogue expand agency? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T37

TOOL

Session planning canvas

Prepare without scripting or controlling the coachee's agenda.

Practical guide

Working form

Worked example

EXCEL TAB T37 Session planning canvas

TIME 10-15 minutes before a routine session; 20-30 minutes where complexity or boundary risk needs review. | **OWNER** Coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Re-read the engagement purpose, prior commitments and any known change in context.
- 02** Hold a tentative possible focus while leaving the coachee free to set today's useful agenda.
- 03** Check the coach's emotion, assumptions, bias and readiness to be present.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Turning a tentative plan into an agenda the coachee must follow; Preparing generic techniques without connecting them to the live contract and context; Failing to notice coach emotion, preferred solutions or conflicts before the session.

CONTINUE THE METHOD

- 04** Prepare a small choice of questions, reflection methods or experiments and test any boundary concern.
- 05** Reserve time and secure handling for post-session notes, follow-up and supervision needs.

BOUNDARY & CAUTION

Do not use session planning to script the conversation, impose the coach's agenda or avoid responding to an emergent risk or priority.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.164



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T37

TOOL

Session planning canvas

Prepare without scripting or controlling the coachee's agenda.

Practical guide

Working form

Worked example

EXCEL TAB T37 Session planning canvas

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Contract Current engagement purpose	
Context Known changes or commitments	
Possible focus Tentative, not imposed	
Coach state Bias, emotion, assumptions and presence	
Methods Possible questions, reflection or experiment	
Boundary Any risk or role issue	
After Notes, supervision and follow-up	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T37

TOOL

Session planning canvas

Prepare without scripting or controlling the coachee's agenda.

Practical guide

Working form

Worked example

EXCEL TAB T37 Session planning canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Contract Current engagement purpose	Help M-07 prepare to surface uncertainty and invite challenge at Thursday's contingency review without seeking technical advice.
Context Known changes or commitments	The commercial estimate changed, the sponsor wants a recommendation Friday and last session's early-escalation experiment partly succeeded.
Possible focus Tentative, not imposed	Review what happened, examine the certainty assumption and rehearse a criteria-first opening if M-07 chooses.
Coach state Bias, emotion, assumptions and presence	Notice my preference for direct challenge and infrastructure familiarity; remain curious about political and cultural meaning.
Methods Possible questions, reflection or experiment	Use critical-moment replay, two-chair stakeholder perspective, concise rehearsal and an if-then implementation intention.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T38

TOOL

GROW conversation guide

Structure a focused coaching conversation around goal, reality, options and way forward.

Practical guide

Working form

Worked example

EXCEL TAB T38 GROW conversation guide

TIME 20-45 minutes for a focused GROW conversation, with a brief check-in on the agreed follow-up date. | OWNER Coach/manager

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Goal: agree what would make the conversation useful and check that the goal is genuinely the coachee's.
- 02** Reality: explore what is happening now, using evidence, context and the coachee's meaning.
- 03** Options: generate alternatives, consequences and resources before evaluating or narrowing them.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Marching through GROW questions mechanically when emotion or contracting needs attention; Supplying the options and leaving the coachee to select the coach's answer; Ending with intention but no owner, timing, context or learning check.

CONTINUE THE METHOD

- 04** Way forward: choose the action, timing, support and learning evidence with clear ownership.
- 05** Follow-up: agree when progress will be reviewed and what may trigger adaptation.

BOUNDARY & CAUTION

Do not use GROW when a directive, formal performance, investigation, crisis or specialist-support conversation is actually required.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.167

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T38 GROW conversation guide

TOOL

Structure a focused coaching conversation around goal, reality, options and way forward.

Guide

Worksheet

Example

LIVE WORKSHEET



Goal What would make this useful?

Reality What is happening; what evidence and meaning?

Options What else; consequences; resources?

Way forward What will you do, when, and how will you learn?

Contract check Whose goal is this?

Follow-up When and how progress is reviewed

T38 GROW conversation guide

TOOL

Structure a focused coaching conversation around goal, reality, options and way forward.

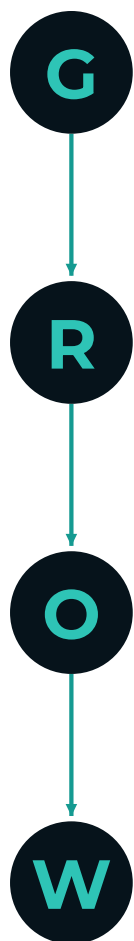
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.



Goal What would make this useful?

Leave with an opening for Thursday's commercial review that enables a decision without overstating certainty.

Reality What is happening; what evidence and meaning?

Ground data remain incomplete; Commercial fears cost drift, while M-07 fears early disclosure will undermine confidence.

Options What else; consequences; resources?

Delay, present one estimate, compare bounded scenarios, request staged authority or escalate the unresolved threshold.

Way forward What will you do, when, and how will you learn?

Draft a criteria-first slide today, rehearse with the engineering lead Wednesday and ask Commercial to test both scenarios Thursday.

Contract check Whose goal is this?

M-07 selects the experiment; it serves their stated goal, not the coach's preferred communication style.

Follow-up When and how progress is reviewed

Not populated in the original worked extract.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T39

TOOL

CLEAR conversation guide

Use Contract-Listen-Explore-Action-Review for relational or complex work.

Practical guide

Working form

Worked example

EXCEL TAB T39 CLEAR conversation guide

TIME 45-75 minutes for a full CLEAR cycle; relationship and action review at the next session. | OWNER Coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Contract: agree the purpose, roles, boundaries and way of working for this dialogue.
- 02** Listen: attend to story, emotion, system and silence without rushing to a solution.
- 03** Explore: surface patterns, assumptions, relationships and credible alternative meanings.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Compressing contracting and listening to reach action as quickly as possible; Exploring only the individual's thinking while ignoring relationship and system dynamics; Reviewing task progress but not the usefulness, challenge or quality of the relationship.

CONTINUE THE METHOD

- 04** Action: let the coachee choose a bounded experiment or decision and required support.
- 05** Review: examine learning about both the topic and the coaching relationship, then re-contract if needed.

BOUNDARY & CAUTION

Do not use CLEAR as a linear script or continue relational exploration beyond coaching competence when clinical or safeguarding support is indicated.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.170

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T39 CLEAR conversation guide

TOOL

Use Contract-Listen-Explore-Action-Review for relational or complex work.

Guide

Worksheet

Example

LIVE WORKSHEET



Contract Purpose and way of working

Listen Story, emotion, system and silence

Explore Patterns, assumptions and alternatives

Action Chosen experiment or decision

Review Learning about topic and relationship

T39 CLEAR conversation guide

TOOL

Use Contract-Listen-Explore-Action-Review for relational or complex work.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.



Contract Purpose and way of working

Explore why challenge with Commercial stalls and agree a useful experiment for the next gate conversation.

Listen Story, emotion, system and silence

M-07 describes frustration, careful preparation and a repeated sense that dissent threatens project credibility.

Explore Patterns, assumptions and alternatives

Test authority, identity, incentives and relationship history; distinguish evidence from assumptions about the Commercial Director's response.

Action Chosen experiment or decision

Open with shared criteria, name two uncertainties and invite Commercial to identify the strongest contrary evidence.

Review Learning about topic and relationship

M-07 reports useful challenge and sufficient safety; both agree the coach should interrupt lengthy technical defence sooner.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T40

TOOL

OSKAR solution-focused guide

Build on desired outcome, existing resources and small steps.

Practical guide

Working form

Worked example

EXCEL TAB T40 OSKAR solutionfocused guide

TIME 20-40 minutes, with a 10-15 minute scaling and progress review after the next action opportunity. | **OWNER** Coach/manager

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Outcome: describe what the coachee wants instead in concrete, useful terms.
- 02** Scaling: establish the present 0-10 position and what makes it that number rather than lower.
- 03** Know-how: identify exceptions, existing resources and occasions when part of the outcome already occurs.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using the scale as a performance rating reported to the sponsor; Forcing optimism and affirmations that the participant does not experience as credible; Using solution focus to avoid material harm, conflict or organisational constraints.

CONTINUE THE METHOD

- 04** Affirm/action: acknowledge evidenced capability and choose the smallest step toward the next scale point.
- 05** Review: rescale after action, identify what improved and decide how to repeat or adapt it.

BOUNDARY & CAUTION

Do not use solution focus to bypass harm, grief, discrimination, conflict facts or root causes that first require acknowledgement and action.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.173

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T40 OSKAR solution-focused guide

TOOL

Build on desired outcome, existing resources and small steps.

Guide

Worksheet

Example

LIVE WORKSHEET



Outcome What do you want instead?

Scaling Where are you now, 0-10?

Know-how What is already working?

Affirm/action Which resource and next step?

Review What improved and how?

T40 OSKAR solution-focused guide

TOOL

Build on desired outcome, existing resources and small steps.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.



Outcome What do you want instead?

A gate conversation where uncertainty is visible, challenge improves the recommendation and ownership remains clear.

Scaling Where are you now, 0-10?

M-07 rates current practice 5 of 10: criteria are clearer, but dissent is still invited late.

Know-how What is already working?

At the utilities review, opening with dependencies and asking Engineering first produced constructive alternatives.

Affirm/action Which resource and next step?

Reuse the concise visual map and invite the most affected function before stating M-07's preferred option.

Review What improved and how?

After the next review, compare the scale, decision record and stakeholder observation to identify what shifted.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T41

TOOL

Powerful question planner

Create concise inquiry without interrogation or hidden advice.

Practical guide

Working form

Worked example

EXCEL TAB T41 Powerful question planner

TIME 15-25 minutes to plan and rehearse, then 10 minutes to review selected questions after use. | **OWNER** Coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Name the awareness or decision the question is intended to serve.
- 02** Draft one short, open question with no embedded advice or multiple clauses.
- 03** Expose presuppositions, judgement, preferred answers and power effects hidden in the wording.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Stacking several questions or embedding the coach's preferred explanation; Prioritising a clever formulation over plain language the coachee can process; Failing to inspect cultural, cognitive or power assumptions carried by the question.

CONTINUE THE METHOD

- 04** Create a simpler, more neutral and accessible alternative for the same purpose.
- 05** Use one question, allow silence and review what the coachee actually did with it.

BOUNDARY & CAUTION

Do not mistake provocative wording for a powerful question; hidden advice, stacked questions and unnecessary cognitive load reduce agency.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.176



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T41

TOOL

Powerful question planner

Create concise inquiry without interrogation or hidden advice.

Practical guide

Working form

Worked example

EXCEL TAB T41 Powerful question planner

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Purpose What the question serves	
Question Open, short and one at a time	
Assumption What it may smuggle in	
Access Language and cognitive load	
Alternative Simpler or more neutral version	
Response What the coachee did with it	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T41

TOOL

Powerful question planner

Create concise inquiry without interrogation or hidden advice.

Practical guide

Working form

Worked example

EXCEL TAB T41 Powerful question planner

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose What the question serves	Help M-07 examine an assumption about executive confidence without implying that the assumption is false.
Question Open, short and one at a time	What tells you that naming uncertainty early would reduce the sponsor's confidence in your leadership?
Assumption What it may smuggle in	The wording may privilege observable evidence and underweight tacit knowledge, identity or prior consequences.
Access Language and cognitive load	Ask one clause at a time, allow reflection and clarify whether 'confidence' means trust, certainty or approval.
Alternative Simpler or more neutral version	What might happen if you named one important uncertainty earlier than usual?

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T42

TOOL

Listening observation sheet

Develop listening beyond facts and chronology.

Practical guide

Working form

Worked example

EXCEL TAB T42 Listening observation sheet

TIME 30-60 minutes of observed practice and 30-45 minutes for evidence-based feedback and development planning. | **OWNER** Coach/supervisor

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Agree the observed segment, consent, evidence focus and how notes or recordings will be handled.
- 02** Record separately the facts/story, expressed or implied emotion, and values at stake.
- 03** Mark repeated patterns, contradictions, avoidance and the role of power or system context.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Recording inferred emotion or intention as if the coachee stated it; Listening only for narrative content while missing values, power and repeated patterns; Repurposing a coaching observation sheet as evidence for employment assessment.

CONTINUE THE METHOD

- 04** Observe how silence and each coach response affected depth, agency or direction.
- 05** Debrief with behavioural evidence and select one listening practice to test and re-observe.

BOUNDARY & CAUTION

Do not observe or record without explicit consent, trained interpretation and proportionate controls for confidential material.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.179



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T42

TOOL

Listening observation sheet

Develop listening beyond facts and chronology.

Practical guide

Working form

Worked example

EXCEL TAB T42 Listening observation sheet

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Content Facts, sequence and stated meaning	
Emotion Named and implied affect	
Values What matters	
Pattern Repetition, contradiction or avoidance	
System Power, roles and context	
Silence What space enabled	
Coach response Impact of reflection or question	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T42

TOOL

Listening observation sheet

Develop listening beyond facts and chronology.

Practical guide

Working form

Worked example

EXCEL TAB T42 Listening observation sheet

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Content Facts, sequence and stated meaning	M-07 reports a revised estimate, a Friday deadline and disagreement over who can authorise contingency movement.
Emotion Named and implied affect	Frustration is named; longer pauses and faster speech suggest concern when executive credibility is discussed.
Values What matters	Professional reliability, candour, collective responsibility and protecting the team from avoidable last-minute change.
Pattern Repetition, contradiction or avoidance	Detailed explanation expands whenever authority is uncertain; alternatives and personal impact appear only after prompting.
System Power, roles and context	Commercial-delivery power is uneven, the sponsor rewards concise certainty and the gate template hides unresolved assumptions.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T43

TOOL

Challenge with permission

Offer observations that increase awareness without imposing a verdict.

Practical guide

Working form

Worked example

EXCEL TAB T43 Challenge with permission

TIME 10-20 minutes within a session, including consent and repair; revisit impact before or at the next session. | **OWNER** Coach/manager

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Clarify how naming the discrepancy or avoidance could serve the coachee's agreed goal.
- 02** Ask permission to offer a potentially challenging observation and accept a no.
- 03** State the specific behaviour tentatively, separating observation from interpretation and possible impact.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Delivering challenge as a verdict rather than a tentative behavioural observation; Seeking permission ceremonially and continuing after the coachee declines or pauses; Exaggerating possible impact without asking what the coachee makes of it.

CONTINUE THE METHOD

- 04** Invite the coachee's meaning, attend to emotion and avoid defending the challenge.
- 05** Repair or re-contract if it lands poorly, then agree any coachee-owned learning or action.

BOUNDARY & CAUTION

Do not challenge to display insight, force disclosure or win an interpretation, especially where power makes refusal or disagreement unsafe.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.182



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T43 Challenge with permission

TOOL

Offer observations that increase awareness without imposing a verdict.

Guide

Worksheet

Example

LIVE WORKSHEET

Purpose Why challenge may serve the goal

Permission How consent is sought

Observation Specific, behavioural and tentative

Impact Possible consequence

Inquiry What does the coachee make of it?

Response Emotion and meaning

Repair What is needed if challenge lands poorly

Basis: H01 / H04 | H04 source p.182

T43 Challenge with permission

TOOL

Offer observations that increase awareness without imposing a verdict.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Purpose Why challenge may serve the goal

Test whether additional technical detail is protecting credibility while inadvertently delaying the decision M-07 wants.

Permission How consent is sought

May I offer a specific pattern I noticed and hear what fits or does not?

Observation Specific, behavioural and tentative

When we reached authority uncertainty, your explanation lengthened and the two available choices disappeared from view.

Impact Possible consequence

A stakeholder may debate detail instead of engaging the ownership and risk decision requiring resolution.

Inquiry What does the coachee make of it?

What do you notice, and what function might the extra detail be serving in that moment?

Response Emotion and meaning

Not populated in the original worked extract.

Repair What is needed if challenge lands poorly

Not populated in the original worked extract.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T44

TOOL

Values-to-choice map

Clarify competing values and make deliberate trade-offs.

Practical guide

Working form

Worked example

EXCEL TAB T44 Valuestochoice map

TIME 30-45 minutes for one dilemma, with a 15-minute review after the decision has been tested in practice. | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** State the decision or dilemma without prematurely reducing it to two choices.
- 02** Name the legitimate value each option protects and the evidence that it matters here.
- 03** Surface the practical, relational and identity cost attached to protecting each value.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using values language to rationalise a choice already preferred by the coach; Creating a false binary and overlooking options that honour both competing goods; Ignoring safety, legal, ethical or organisational constraints on the available choices.

CONTINUE THE METHOD

- 04** Choose the trade-off and boundary that best reflects who the coachee intends to be.
- 05** Act, review consequences and learning, and revise the choice if the evidence warrants it.

BOUNDARY & CAUTION

Do not frame a decision as a values conflict when legal duties, safety requirements or organisational authority remove one of the apparent options.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.185



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T44

TOOL

Values-to-choice map

Clarify competing values and make deliberate trade-offs.

Practical guide

Working form

Worked example

[EXCEL TAB T44 Valuestochoice map](#)

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Choice Decision or dilemma	
Value A What would be protected	
Value B Competing good	
Cost What each choice asks	
Identity Who the coachee wants to be	
Action Choice and boundary	
Review Evidence and learning	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T44

TOOL

Values-to-choice map

Clarify competing values and make deliberate trade-offs.

Practical guide

Working form

Worked example

EXCEL TAB T44 Valuestochoice map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Choice Decision or dilemma	Escalate the contingency-authority ambiguity now or continue negotiating informally until evidence is more complete.
Value A What would be protected	Early escalation protects candour, timely governance and the team's ability to plan within explicit boundaries.
Value B Competing good	Continued dialogue protects working relationships, local ownership and the possibility of resolving disagreement without hierarchy.
Cost What each choice asks	Escalation may feel adversarial; delay risks rework, compressed scrutiny and accountability without sufficient authority.
Identity Who the coachee wants to be	M-07 wants to be a candid, collaborative director who names material uncertainty before it becomes crisis.

WHAT THE COACH SHOULD NOTICE

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TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T45

TOOL

Assumption testing canvas

Turn a limiting certainty into a safe test.

Practical guide

Working form

Worked example

EXCEL TAB T45 Assumption testing canvas

TIME 35-45 minutes; 10-minute review after the test | **OWNER** Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** State one consequential assumption as a claim that evidence could disconfirm.
- 02** List observations supporting it, separating direct evidence from interpretation.
- 03** Seek exceptions and missing evidence rather than defending the claim.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Writing an assumption as a fact that cannot be disproved; Searching only for observations that support the preferred explanation; Designing a test too broad or risky to interpret safely.

CONTINUE THE METHOD

- 04** Generate at least two plausible explanations for the same observations.
- 05** Run the smallest safe test, compare predictions and update the assumption.

BOUNDARY & CAUTION

Do not use assumption testing to dismiss a verified constraint or expose anyone to a high-stakes test.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.188



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T45 Assumption testing canvas

TOOL

Turn a limiting certainty into a safe test.

Guide

Worksheet

Example

LIVE WORKSHEET

Assumption Belief stated clearly

Evidence for Observations supporting it

Evidence against Exceptions or missing data



Alternative Other plausible explanation

Safe test Small action

Prediction Expected result

Learning What happened and what changed

Basis: H01 / H04 | H04 source p.188

T45 Assumption testing canvas

TOOL

Turn a limiting certainty into a safe test.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Assumption Belief stated clearly

Commercial leads resist early challenge because they believe it slows investment approvals.

Evidence for Observations supporting it

Three recent gate meetings ended discussion when commercial risks were raised late.

Evidence against Exceptions or missing data

Two commercial leads requested earlier options workshops on comparably complex projects.

Alternative Other plausible explanation

Decision papers may arrive too late for useful challenge, irrespective of relationships.

Safe test Small action

Circulate criteria and options 48 hours early, then compare challenge quality at one gate.

Prediction Expected result

Not populated in the original worked extract.

Learning What happened and what changed

Not populated in the original worked extract.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T46

TOOL

Immunity-to-change map

Explore hidden commitments that compete with a desired change.

Practical guide

Working form

Worked example

EXCEL TAB T46 Immunitytochange map

TIME 60-90 minutes; revisit only after a safe test | **OWNER** Experienced coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Define an improvement goal the coachee genuinely wants and can influence.
- 02** List what the coachee does and avoids that sustains the gap.
- 03** Ask what worrying consequence might follow if each behaviour changed.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Treating protective behaviour as resistance or lack of commitment; Stopping at the stated goal without surfacing the competing commitment; Testing the big assumption first in a high-stakes sponsor interaction.

CONTINUE THE METHOD

- 04** Translate recurring worries into a competing commitment and big assumption.
- 05** Design a low-risk assumption test, then review evidence without forcing change.

BOUNDARY & CAUTION

Do not treat the map as diagnosis or explore trauma-related protection without consent, competence and an appropriate route.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.191



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T46 Immunity-to-change map

TOOL

Explore hidden commitments that compete with a desired change.

Guide

Worksheet

Example

LIVE WORKSHEET

Improvement goal
Meaningful desired change

Doing/not doing
Behaviours
maintaining status quo

Worry What might happen if behaviour changed

Competing commitment
Protection implied by worry

Big assumption Belief making protection necessary

Test Safe evidence-gathering experiment

Basis: H01 / H04 | H04 source p.191

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T46 Immunity-to-change map

TOOL

Explore hidden commitments that compete with a desired change.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Improvement goal Meaningful desired change

Challenge the sponsor's preferred option respectfully before three consecutive investment decisions.

Doing/not doing Behaviours maintaining status quo

I soften questions, wait for others and omit dissenting evidence from summaries.

Worry What might happen if behaviour changed

Direct challenge could mark me as obstructive and weaken sponsor confidence.

Competing commitment Protection implied by worry

Preserve approval pace and remain viewed as a dependable delivery leader.

Big assumption Belief making protection necessary

If I question a preferred option publicly, the sponsor will stop trusting me.

Test Safe evidence-gathering experiment

Not populated in the original worked extract.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T47

TOOL

Decision quality canvas

Improve strategic decisions without supplying the answer.

Practical guide

Working form

Worked example

EXCEL TAB T47 Decision quality canvas

TIME 45-60 minutes; up to 90 for material decisions | **OWNER** Executive coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** State the decision, deadline, owner and any non-negotiable authority boundary.
- 02** Set and, where useful, weight decision criteria before comparing options.
- 03** Map known, uncertain and missing evidence against each criterion.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Choosing criteria after attachment to an option has formed; Presenting uncertain or missing evidence as a complete business case; Excluding delay, no action and conditional approval from the option set.

CONTINUE THE METHOD

- 04** Generate credible options, including conditions, delay and no action.
- 05** Name likely biases, seek disconfirming challenge and record the decision rationale.

BOUNDARY & CAUTION

This canvas supports judgment; it does not replace engineering, commercial, legal, safety or delegated-authority due diligence.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.194



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T47

TOOL

Decision quality canvas

Improve strategic decisions without supplying the answer.

Practical guide

Working form

Worked example

EXCEL TAB T47 Decision quality canvas

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Decision What must be decided and by when	
Criteria What good must satisfy	
Evidence Known, uncertain and missing	
Options Including delay/no action	
Bias Attachment, pressure and framing	
Stakeholders Impact and voice	
Choice Decision and review trigger	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T47

TOOL

Decision quality canvas

Improve strategic decisions without supplying the answer.

Practical guide

Working form

Worked example

EXCEL TAB T47 Decision quality canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision What must be decided and by when	Decide by 15 December whether to extend coaching beyond the twelve-person pilot.
Criteria What good must satisfy	Ethical quality, equitable access, applied behaviour, useful outcomes and affordable capacity must meet thresholds.
Evidence Known, uncertain and missing	Ten participants applied the routine; alliance is strong, but transfer data cover only eight.
Options Including delay/no action	Extend unchanged, expand with conditions, hold for evidence, redesign the pathway or stop.
Bias Attachment, pressure and framing	The sponsor publicly endorsed coaching, creating pressure to interpret mixed evidence positively.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T48

TOOL

Difficult conversation rehearsal

Prepare a high-stakes conversation through practice and feedback.

Practical guide

Working form

Worked example

EXCEL TAB T48 Difficult conversation rehe

TIME 30-45 minutes; repeat briefly before the conversation | **OWNER** Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Define the useful outcome and any safety or formal-process boundary.
- 02** Separate observable facts from assumptions about the counterpart's motives.
- 03** Draft a concise message linking facts, impact, need and invitation.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Mixing interpretation and motive into the statement of facts;
Memorising a speech without preparing to listen and adapt;
Rehearsing how to win instead of how to reach a workable outcome.

CONTINUE THE METHOD

- 04** Explore the counterpart's plausible perspective without inventing certainty.
- 05** Rehearse opening, difficult responses, listening and a specific workable close.

BOUNDARY & CAUTION

Do not rehearse an informal conversation where safety, harassment, grievance or another protected formal process requires specialist handling.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.197



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T48 Difficult conversation rehearsal

TOOL

Prepare a high-stakes conversation through practice and feedback.

Guide

Worksheet

Example

LIVE WORKSHEET

Outcome What the conversation must achieve

Facts Observable evidence

Message Clear and respectful core

Perspective Other party's likely concerns

Rehearsal Opening and pivotal moments

Feedback Impact of words, tone and pace

Contingency Response to resistance or emotion

Basis: H01 / H04 | H04 source p.197



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T48 Difficult conversation rehearsal

TOOL

Prepare a high-stakes conversation through practice and feedback.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Outcome What the conversation must achieve

Agree earlier commercial involvement without blaming the procurement lead for previous delays.

Facts Observable evidence

Commercial review began five days before gate; two pricing assumptions then required rework.

Message Clear and respectful core

I need commercial review at options stage so we can resolve assumptions before gate papers freeze.

Perspective Other party's likely concerns

Procurement faces competing deadlines and may hear this request as criticism of its service.

Rehearsal Opening and pivotal moments

Practise opening, pause for response, acknowledge workload and propose one trial workflow.

Feedback Impact of words, tone and pace

Not populated in the original worked extract.

Contingency Response to resistance or emotion

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.197

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T49

TOOL

Feedback and feedforward planner

Seek behavioural evidence and turn it into future action.

Practical guide

Working form

Worked example

EXCEL TAB T49 Feedback and feedforward pl

TIME 30-45 minutes plus a 15-minute pattern review | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Select one observable behaviour connected to the coaching goal.
- 02** Agree appropriate sources and ask one behaviour-level feedback question.
- 03** Gather concrete examples, including helpful, difficult and contradictory evidence.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Requesting personality judgments rather than observable behaviour examples; Cherry-picking comfortable comments and dismissing a recurring difficult pattern; Turning contextual feedback into a fixed conclusion about identity or capability.

CONTINUE THE METHOD

- 04** Identify patterns by context, impact and source rather than counting opinions.
- 05** Form a provisional meaning and choose one feedforward experiment to test it.

BOUNDARY & CAUTION

Do not gather covert feedback or repurpose developmental observations for an undisclosed employment decision.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.200



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T49

TOOL

Feedback and feedforward planner

Seek behavioural evidence and turn it into future action.

Practical guide

Working form

Worked example

EXCEL TAB T49 Feedback and feedforward pl

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Behaviour Specific area	
Sources Relevant observers	
Question Neutral and actionable	
Pattern Themes and exceptions	
Meaning Coachee interpretation	
Feedforward Future behaviour request	
Test Next work moment	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T49

TOOL

Feedback and feedforward planner

Seek behavioural evidence and turn it into future action.

Practical guide

Working form

Worked example

EXCEL TAB T49 Feedback and feedforward pl

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Behaviour Specific area	I close discussion after the first viable option instead of inviting structured dissent.
Sources Relevant observers	Two peers, the sponsor and three self-reviewed gate recordings supplied behaviour-level observations.
Question Neutral and actionable	When did my facilitation make it easier or harder to challenge the leading option?
Pattern Themes and exceptions	Questions broaden early, then narrow immediately after the sponsor signals a preference.
Meaning Coachee interpretation	My pace protects certainty but may suppress evidence needed for a robust decision.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T50

TOOL

Session close and commitment

Consolidate learning and create accountable next action.

Practical guide

Working form

Worked example

EXCEL TAB T50 Session close and commitmen

TIME 10-15 minutes at every session close | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

- 01** Invite the coachee to name the most useful learning in their words.
- 02** Clarify the choice they are making, including any choice to pause.
- 03** Convert intention into one specific action with a cue or date.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Ending with several intentions and no clear priority;
Recording an action without a date, cue or review point;
Naming support that breaches confidentiality or removes coachee ownership.

CONTINUE THE METHOD

- 04** Check feasibility, risk, support and what remains deliberately unshared.
- 05** Confirm how evidence will be noticed and when commitment will be reviewed.

BOUNDARY & CAUTION

Do not force a commitment when reflection, consent, competence or operational safety requires pause or referral.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.203



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T50

TOOL

Session close and commitment

Consolidate learning and create accountable next action.

Practical guide

Working form

Worked example

EXCEL TAB T50 Session close and commitmen

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Learning What is clearer or different	
Choice What the coachee has decided	
Action Specific next step	
When Date/situation	
Support Resource or person	
Evidence What will show progress	
Confidence 0-10 and what would raise it	
Carry-forward Next session possibility	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T50

TOOL

Session close and commitment

Consolidate learning and create accountable next action.

Practical guide

Working form

Worked example

EXCEL TAB T50 Session close and commitmen

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Learning What is clearer or different	I confuse a fast decision with a well-tested decision when sponsor pressure rises.
Choice What the coachee has decided	I will pause after criteria are stated and explicitly request one contrary view.
Action Specific next step	Send the decision-framing agenda to Thursday's package-board members before noon Wednesday.
When Date/situation	At Thursday's 09:00 package board, before the preferred contractor is discussed.
Support Resource or person	A peer will observe only the agreed behaviours and provide private feedback afterwards.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X31

ACTIVITY

Describe the preferred future

Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.

Practical guide

Working form

Worked example

EXCEL TAB X31 Describe the preferred futu

TIME 40 minutes

BRING An agreed work question | A near-term situation | Permission to use future-focused questions

RUN THE ACTIVITY

- 01** Ask what the coachee would like to be different in a specific situation. Acknowledge the current difficulty without requiring a complete causal explanation first.
- 02** Invite a description of what they would do and what others could observe if the situation were more useful. Replace broad adjectives with actions, words and decisions.
- 03** Ask what would be different first, before the whole problem is solved. Keep the future within operational and ethical constraints.

QUESTIONS TO OPEN THINKING

What would you notice first?
What would a colleague hear you say differently?
Where is a small part of that already happening?

CONTINUE THE METHOD

- 04** Explore whether any part of that future already occurs. Identify existing resources and conditions rather than constructing an entirely new personality.
- 05** Choose a small action that the coachee is willing to try and specify the opportunity. Check that it does not depend on controlling someone else's response.
- 06** Ask what evidence would indicate progress, no change or an unintended effect. Agree a review rather than promising that future-focused thinking itself will produce the outcome.

BOUNDARY & CAUTION

Future-focused questions must not minimise harm, unresolved grievances or conditions needing formal action. Use another approach when the person needs those issues acknowledged first.

BETWEEN SESSIONS / HAND-OFF

Write three observable signs of a better meeting and notice one at the next opportunity.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R10 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X31 Describe the preferred future

ACTIVITY

Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.

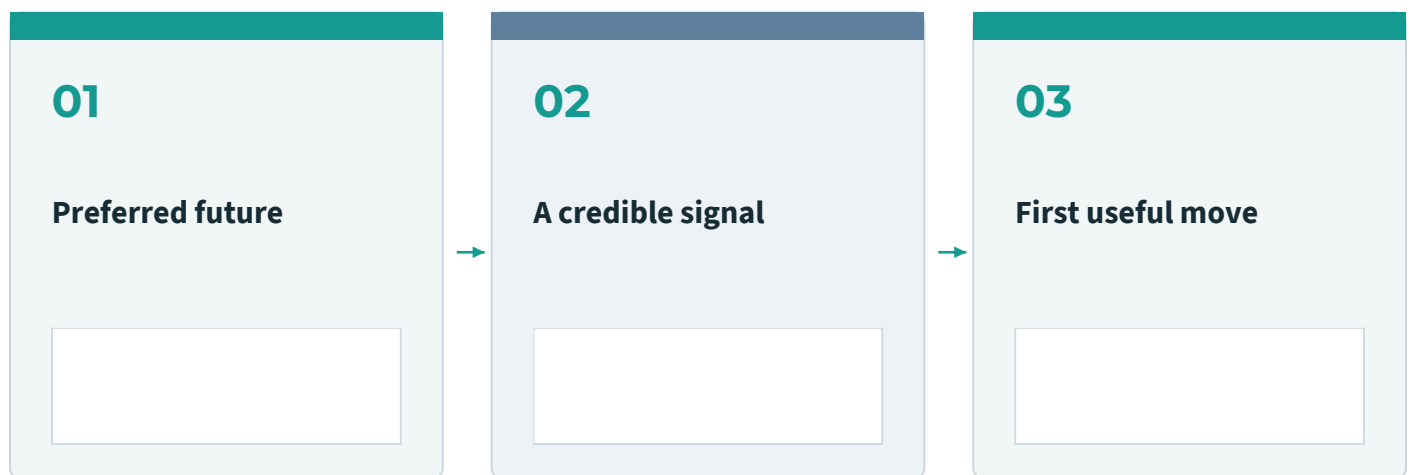
Guide

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Example

LIVE WORKSHEET

PREFERRED-FUTURE BACKCAST



NOW

NEXT USEFUL SIGNAL

FUTURE

Make the story observable and workable, not an idealised promise.

01 Current question

02 Preferred scene

03 First observable difference

04 Existing exception

05 Action

06 Evidence

Basis: H01 / H04 / R10 | Original executive application

X31 Describe the preferred future

ACTIVITY

Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

PREFERRED-FUTURE BACKCAST



Make the story observable and workable, not an idealised promise.

01 Current question

How can M-07 invite challenge without losing direction in gate meetings?

03 First observable difference

M-07 asks for missing evidence before presenting the preferred option.

05 Action

Use the sequence at the next gate and retain the formal decision boundary.

02 Preferred scene

The decision question is clear, concerns are heard and the recommendation is adjusted where evidence warrants it.

04 Existing exception

A recent handover used this sequence and surfaced one important dependency early.

06 Evidence

Record whether a concern changed the recommendation and ask participants whether the opportunity to contribute was clear.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X32

ACTIVITY

Find the useful exception

Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.

Practical guide

Working form

Worked example

EXCEL TAB X32 Find the useful exception

TIME 35 minutes

BRING A recurring, bounded work difficulty | At least one recent exception | A record of relevant contextual differences

RUN THE ACTIVITY

- 01** Ask for a time when the difficulty was less intense, shorter or absent. Do not insist there must be a success story if the coachee cannot identify one.
- 02** Reconstruct the exception: what was different before, during and after the event, including others' actions and environmental conditions.
- 03** Ask what the coachee contributed, while avoiding the assumption that they caused the entire difference.

CONTINUE THE METHOD

- 04** Compare the exception with the usual pattern. Identify one repeatable element and one condition that may not be transferable.
- 05** Choose a modest repeat of the useful element and check its fit with the next situation. A tactic that helped once may not help everywhere.
- 06** Define a learning question and review the result. If no exception exists, use a small exploratory experiment rather than inventing one.

QUESTIONS TO OPEN THINKING

When was this even slightly easier?
What did you or others do differently before the difficulty began?
Which part can you repeat, and which was specific to that situation?

BOUNDARY & CAUTION

Do not use exceptions to dismiss a person's account of persistent barriers or to suggest that serious harm is solved by positive thinking.

BETWEEN SESSIONS / HAND-OFF

Notice and record one small exception without forcing it to become a success narrative.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R10 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X32 Find the useful exception

ACTIVITY

Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.

Guide

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Example

LIVE WORKSHEET

01 Usual pattern



02 Exception

03 Different conditions

04 Repeatable element

05 Non-transferable condition

06 Next test

Basis: H01 / R10 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X32 Find the useful exception

ACTIVITY

Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Usual pattern

M-07 answers a specialist's question immediately and ends up owning the solution.



02 Exception

At a prepared review, M-07 asked for the specialist's options first and ownership remained with them.

03 Different conditions

The evidence was available early and the decision boundary was explicit.

04 Repeatable element

Ask for options and reasoning before offering an answer.

05 Non-transferable condition

An urgent safety issue may require immediate instruction rather than exploratory questioning.

06 Next test

Use the question at one routine recommendation review, then ask whether it helped ownership and clarity.

Basis: H01 / R10 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X33

ACTIVITY

Scaling and one step better

Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.

Practical guide

Working form

Worked example

EXCEL TAB X33 Scaling and one step better

TIME 30 minutes

BRING One specific goal | A personally meaningful scale | A current work opportunity

RUN THE ACTIVITY

- 01** Agree the exact question being scaled, such as confidence to lead a particular conversation. Define zero and ten in the coachee's own observable terms.
- 02** Ask where the person places themselves today and what evidence supports that position. Treat the number as a conversation aid, not a precise measurement.
- 03** Explore why the position is not lower, identifying resources and existing practices. Avoid pressuring the person to give a more positive rating.

QUESTIONS TO OPEN THINKING

What tells you that you are at this point?

What is already helping?

What would one step better look like in the next conversation?

CONTINUE THE METHOD

- 04** Ask what one step higher would look like in behaviour or preparation. Do not assume that ten is necessary or desirable for the task.
- 05** Choose an action that could support that small movement and check practical conditions. A task may be worth doing with uncertainty still present.
- 06** Agree to review both the action and its consequence. Retain the original anchors so a later rating is not interpreted without context.

BOUNDARY & CAUTION

No normative comparison or psychometric interpretation is justified. Keep confidence, readiness, importance and performance as different questions.

BETWEEN SESSIONS / HAND-OFF

Take the one-step action and return with a work example, whether or not the number changes.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R10 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X33 Scaling and one step better

ACTIVITY

Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.

Guide

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Example

LIVE WORKSHEET

ANCHORED ONE-STEP SCALE

DEFINE THE QUESTION AND BOTH ENDPOINTS FIRST



My 0

My 10

A personal discussion scale, not a norm. Retain the original anchors when reviewing change.

01 Scale question

02 Anchors

03 Current position

04 Existing resource

05 One-step action

06 Review

Basis: H01 / H04 / R10 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X33 Scaling and one step better

ACTIVITY

Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

ANCHORED ONE-STEP SCALE

DEFINE THE QUESTION AND BOTH ENDPOINTS FIRST

Current position: 6



Rehearse one challenging objection; the next rating is not assumed.

A personal discussion scale, not a norm. Retain the original anchors when reviewing change.

01 Scale question

Readiness to ask for challenge before stating a gate recommendation.

02 Anchors

Zero: no usable opening or boundary; ten: prepared opening, clear authority and a tested response to disagreement.

03 Current position

M-07 chooses six because the brief is clear but the response to a strong objection is unpractised.

04 Existing resource

A previous handover used a useful concerns-first sequence.

05 One-step action

Rehearse a challenging objection and practise summarising it before deciding.

06 Review

After the meeting, compare what happened with the anchors; the rating is not a competence percentage.

Basis: H01 / H04 / R10 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X34

ACTIVITY

Perspective positions

Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.

Practical guide

Working form

Worked example

EXCEL TAB X34 Perspective positions

TIME 45 minutes

BRING One work interaction | Three labelled spaces: own view, other view, observer | An option to remain seated and use written columns

RUN THE ACTIVITY

- 01** Describe the interaction from the coachee's own position: what they observed, intended, needed and assumed. Keep the discussion within the agreed work remit.
- 02** Invite an imagined view from the other role, explicitly labelling it a hypothesis. Ask what that person might be protecting or needing, without claiming to know their thoughts.
- 03** Move to an observer perspective and describe the sequence between people rather than assigning blame. Use accessible written or verbal alternatives to physical movement.

CONTINUE THE METHOD

- 04** Compare the three accounts and identify assumptions that need checking. Notice where the coachee's behaviour could be interpreted differently from their intention.
- 05** Choose a neutral question to ask the other person and a behaviour to adjust. Avoid constructing a persuasive tactic around an unverified psychological story.
- 06** Rehearse the conversation and decide how to review it. Update the map using the person's actual response.

QUESTIONS TO OPEN THINKING

What might this look like from their role?

What are we imagining rather than knowing?

What could you ask to check your interpretation?

BOUNDARY & CAUTION

This is perspective-taking, not mind-reading or a diagnostic technique. Do not infer hidden motives, trauma or identity from imagined roles.

BETWEEN SESSIONS / HAND-OFF

Ask one checking question in the real relationship and revise the imagined perspective accordingly.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X34 Perspective positions

ACTIVITY

Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Own view

02 Imagined other view

03 Observer view

04 Assumptions to check

05 Next question

06 Behavioural adjustment

Basis: H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X34 Perspective positions

ACTIVITY

Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Own view

M-07 experienced a late objection as a challenge to their authority.

02 Imagined other view

The engineering lead may have thought the decision was already settled or needed further evidence.

03 Observer view

M-07 stated a preference early; the lead spoke briefly; the concern appeared after the meeting.

04 Assumptions to check

Whether the concern existed during the meeting and whether the lead felt able to raise it.

05 Next question

When did this concern become clear, and what would help us surface it at the right point?

06 Behavioural adjustment

Invite concerns before stating the recommendation, then check whether the sequence helped.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X35

ACTIVITY

Weighted decision comparison

Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.

Practical guide

Working form

Worked example

EXCEL TAB X35 Weighted decision compariso

TIME 60 minutes

BRING Two to four feasible options | Evidence for decision criteria | Clear decision authority

RUN THE ACTIVITY

- 01** Define the decision, its owner and the date by which it must be made. Separate mandatory constraints from preferences before considering scores.
- 02** Agree no more than five criteria and what a score of zero to four means for each. Choose weights that sum to one hundred and explain their relative importance.
- 03** Score options using evidence, marking missing information instead of substituting optimistic numbers. Do not score an option through a mandatory failure.

QUESTIONS TO OPEN THINKING

What must be true before an option is even eligible?

Which weight could change the ranking?

What matters that the table does not capture?

CONTINUE THE METHOD

- 04** Calculate weighted totals as an aid to comparison. Examine how the result changes when a disputed weight or score is varied; a narrow margin is not certainty.
- 05** Discuss qualitative consequences, reversibility and who bears the risk. The highest total may still be inappropriate if an unscored concern is material.
- 06** Record the decision, reasons, assumptions and review trigger. Keep the original scores so later learning does not rewrite the reasoning.

BOUNDARY & CAUTION

Scores are local judgements, not probabilities or validated scales. Do not use the matrix to conceal mandatory legal, safety or ethical constraints.

BETWEEN SESSIONS / HAND-OFF

Obtain one missing piece of evidence and rerun only the relevant comparison; document any change in reasoning.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X35 Weighted decision comparison

ACTIVITY

Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.

Guide

Worksheet

Example

LIVE WORKSHEET

WEIGHTED DECISION MATRIX

Criteria	Weight	Option A	Option B	Option C

Check mandatory conditions before comparing weighted totals.

Use locally agreed 0-4 anchors. Weights sum to 100; mandatory conditions remain separate.

01 Decision

02 Options and constraints

03 Criteria and weights

04 Evidence and scores

05 Uncertainty

06 Decision and review

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X35 Weighted decision comparison

ACTIVITY

Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

WEIGHTED DECISION MATRIX

Criteria	Weight	Option A	Option B	Option C
Decision clarity	35		4	
Participation	25		3	
Preparation burden	20		3	
Timeliness	20		4	

Check mandatory conditions before comparing weighted totals.

B = concerns-first brief: 3.55 / 4. Other options are unscored in the source extract.

01 Decision

Select a format for the next cross-functional gate review.

02 Options and constraints

Keep the current format, use a shorter concerns-first brief, or add a separate preparation meeting; all must preserve technical assurance.

03 Criteria and weights

Decision clarity 35, participation 25, preparation burden 20, timeliness 20; scores zero to four with agreed anchors.

04 Evidence and scores

The concerns-first brief scores 4,3,3,4; the weighted total is 3.55 out of 4.

05 Uncertainty

Preparation burden is an estimate; increasing its weight may reduce the advantage.

06 Decision and review

Pilot the concerns-first brief once, then review actual burden, clarity and any missed assurance.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X36

ACTIVITY

Premortem for a leadership experiment

Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.

Practical guide

Working form

Worked example

EXCEL TAB X36 Premortem for a leadership

TIME 40 minutes

BRING A proposed work experiment | Its intended outcome and constraints | Permission to challenge the plan

RUN THE ACTIVITY

- 01** Describe the experiment and the result it is intended to support. Ask the coachee to imagine that it was unhelpful, without implying that failure is inevitable.
- 02** Generate several plausible explanations independently before discussing them. Include execution, assumptions, stakeholder effects and system dependencies.
- 03** Distinguish preventable issues from uncertainties that require monitoring. Avoid listing dramatic risks with no connection to the actual work.

CONTINUE THE METHOD

- 04** For the most material concerns, identify an early signal and a practical prevention or recovery action. Give each action an owner.
- 05** Check that mitigation does not defeat the learning purpose or transfer unreasonable burden to others. Define a stop condition where the experiment should not continue.
- 06** Revise the plan and return to its positive purpose. Review the assumptions after the test rather than using the premortem to justify inaction.

QUESTIONS TO OPEN THINKING

Suppose this was unhelpful: what plausibly happened?

What would we notice early?

Which safeguard is proportionate rather than excessive?

BOUNDARY & CAUTION

This is an original risk-rehearsal activity, not a prediction model. Do not allow imagined failure to become evidence against a person.

BETWEEN SESSIONS / HAND-OFF

Add the two most useful safeguards to the experiment plan and test whether they helped.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X36 Premortem for a leadership experiment

ACTIVITY

Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.

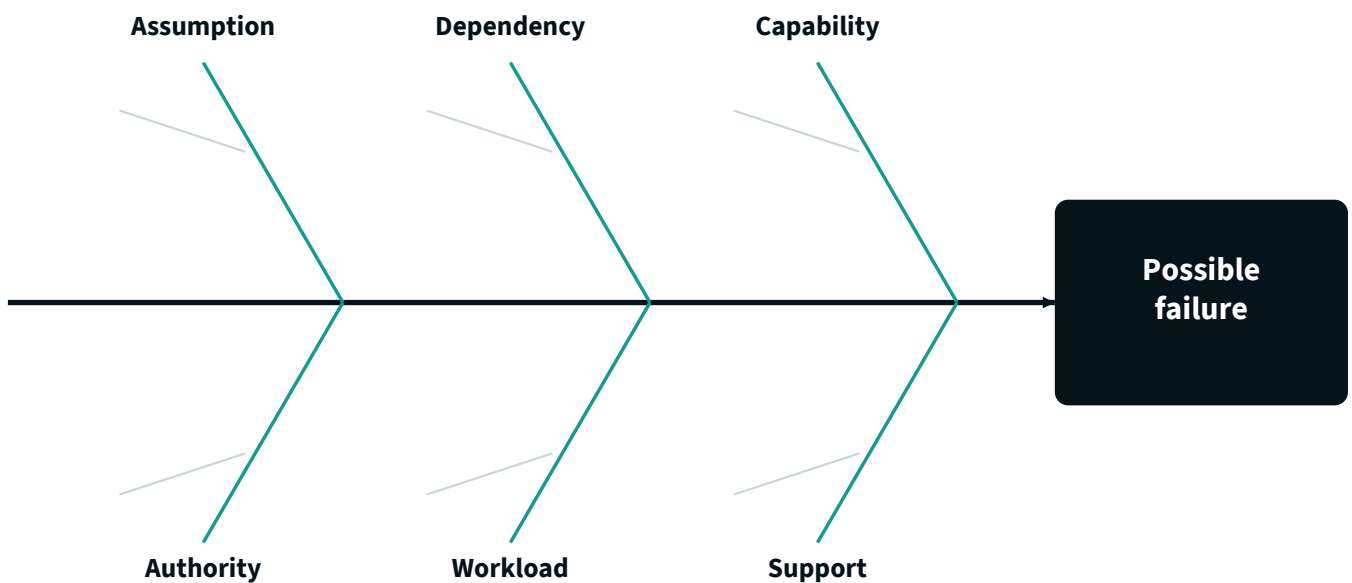
Guide

Worksheet

Example

LIVE WORKSHEET

PREMORTEM CAUSE MAP



Premortem: suppose the experiment failed. Explore plausible reasons; do not treat them as facts.

01 Experiment

02 Possible failure

03 Early signal

04 Prevention

05 Stop or recovery

06 Revised plan

Basis: H01 / H04 | Original executive application

X36 Premortem for a leadership experiment

ACTIVITY

Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.

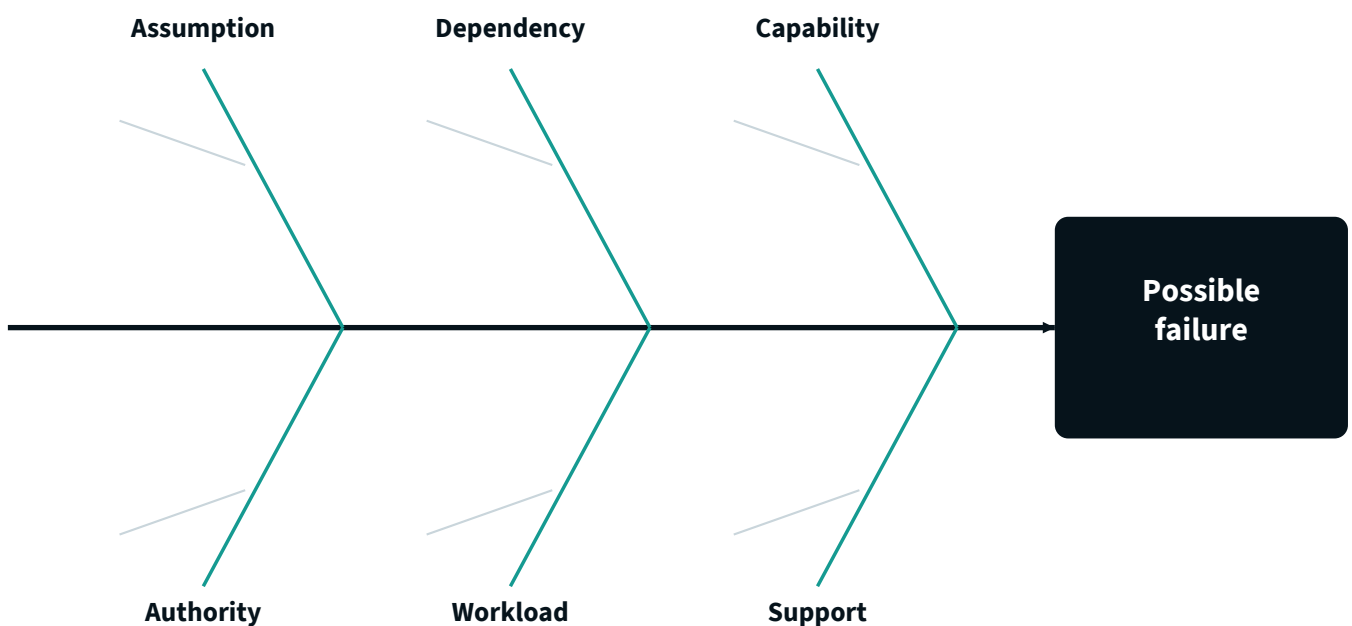
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Worksheet

Example

FICTIONAL WORKED EXAMPLE

PREMORTEM CAUSE MAP



Premortem: suppose the experiment failed. Explore plausible reasons; do not treat them as facts.

01 Experiment

M-07 will invite challenge before stating a recommendation.

03 Early signal

Participants discuss unrelated issues and cannot name the decision required.

05 Stop or recovery

Pause if a mandatory assurance is missing; return to the accountable technical owner rather than forcing a decision.

02 Possible failure

The meeting becomes unfocused because the decision question is unclear.

04 Prevention

Circulate the decision question and criteria in advance, with a route for out-of-scope concerns.

06 Revised plan

Use a bounded challenge round, summarise the evidence and make the decision within the agreed authority.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X37

ACTIVITY

Strategic zoom

Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.

Practical guide

Working form

Worked example

EXCEL TAB X37 Strategic zoom

TIME 45 minutes

BRING A real decision | Three lenses: now, across the system, later | Available evidence and known uncertainties

RUN THE ACTIVITY

- 01** Describe the immediate decision and pressure. Ask what must be settled now and what can remain open without creating unacceptable risk.
- 02** Zoom across the system: identify affected functions, users and dependencies. Ask whether a local improvement could move cost or risk elsewhere.
- 03** Zoom forward to the relevant future horizon. Explore capability, relationships and precedents created by the decision, distinguishing plausible consequences from speculation.

CONTINUE THE METHOD

- 04** Return to the present and identify the trade-off. A strategic perspective should clarify the next action, not become an excuse for avoiding an operational decision.
- 05** Generate a response that addresses the immediate need while protecting a longer-term condition. Define who must be consulted and what authority is required.
- 06** Record the decision and one future signal to monitor. Review whether the broader lens added useful information.

QUESTIONS TO OPEN THINKING

What is genuinely urgent here?

Where might the cost move if we solve it locally?

What precedent would this create if repeated?

BOUNDARY & CAUTION

Long-range scenarios are not forecasts. Do not use strategic language to bypass urgent safety, employment or technical responsibilities.

BETWEEN SESSIONS / HAND-OFF

Apply the three lenses to one upcoming decision and record which lens actually changed your choice.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X37 Strategic zoom

ACTIVITY

Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.

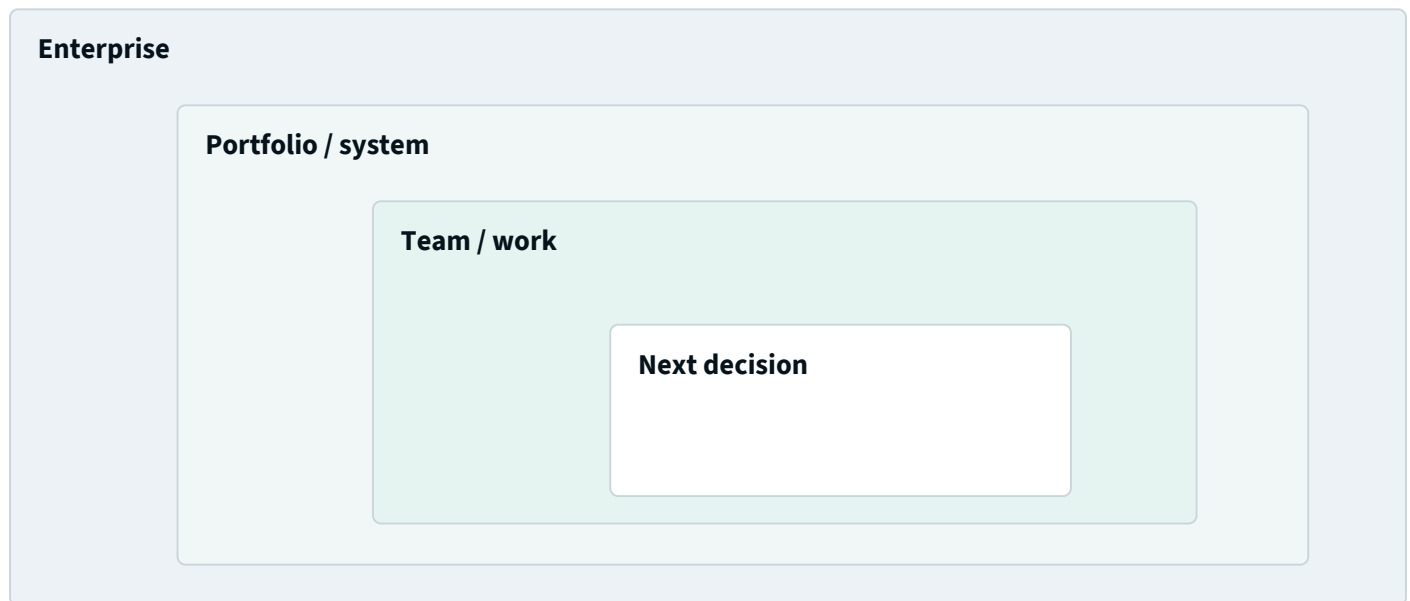
Guide

Worksheet

Example

LIVE WORKSHEET

STRATEGIC ZOOM FRAMES



Move between levels without losing the decision, the time horizon or the people affected.

01 Immediate issue

02 System view

03 Longer-term view

04 Trade-off

05 Chosen response

06 Review signal

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X37 Strategic zoom

ACTIVITY

Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.

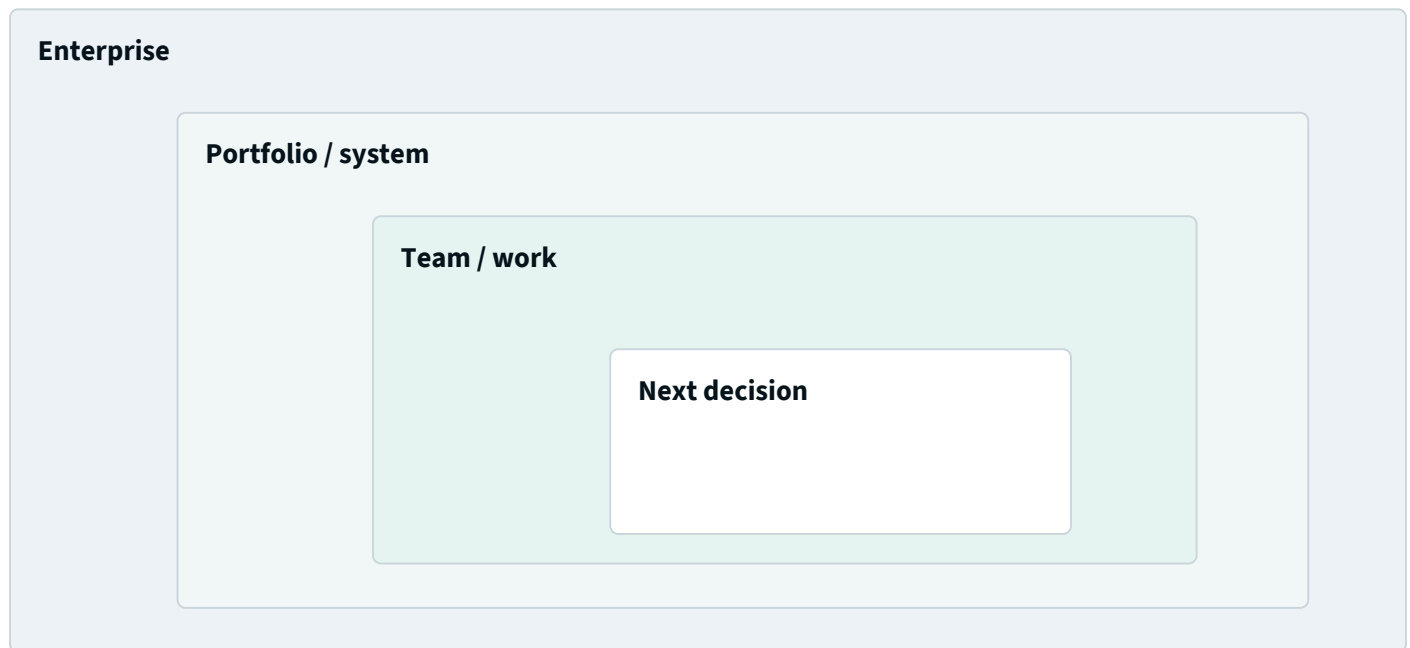
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Worksheet

Example

FICTIONAL WORKED EXAMPLE

STRATEGIC ZOOM FRAMES



Move between levels without losing the decision, the time horizon or the people affected.

01 Immediate issue

M-07 could rewrite a late recommendation to meet tomorrow's gate.

03 Longer-term view

Repeated takeover could weaken specialist ownership and make the director a bottleneck.

05 Chosen response

Agree a short evidence checkpoint and ask the specialist to complete the recommendation within an explicit boundary.

02 System view

Doing so may protect the date but reinforce waiting for the director across three functions.

04 Trade-off

Protect the gate while building clearer ownership, without experimenting with mandatory assurance.

06 Review signal

Track whether the next comparable recommendation arrives with clearer ownership and fewer avoidable take-backs.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X38

ACTIVITY

Both-and tension map

Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.

Practical guide

Working form

Worked example

EXCEL TAB X38 Bothand tension map

TIME 50 minutes

BRING A recurring tension such as pace and participation | Examples of each side helping and becoming excessive | Decision constraints

RUN THE ACTIVITY

- 01** Name the two legitimate needs in neutral language. Check that this is a genuine ongoing tension, not a choice between acceptable and harmful conduct.
- 02** Describe the value of each side and what happens when it is neglected. Use work episodes rather than abstract advocacy.
- 03** Explore the downside of overemphasising either side. Avoid implying that every situation requires equal emphasis or compromise.

QUESTIONS TO OPEN THINKING

What does each side protect?

What happens when you overplay it?

What signal would tell you to adjust?

CONTINUE THE METHOD

- 04** Identify early warning signs that the balance is becoming unhelpful. Ask which signals can be observed by others and how they can raise them safely.
- 05** Design a small routine that protects both needs, such as a time-bounded challenge round followed by a clear decision. Keep mandatory requirements outside the trade-off.
- 06** Agree a review rhythm and ownership. The aim is responsive judgement, not a permanently ideal position on a chart.

BOUNDARY & CAUTION

Do not frame discrimination, unsafe conduct or a mandatory standard as a polarity to balance. Use the appropriate formal decision route.

BETWEEN SESSIONS / HAND-OFF

Ask a colleague to notice one agreed warning signal and discuss it without assigning blame.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X38 Both-and tension map

ACTIVITY

Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Tension

PACE

02 Value of pace

MEANINGFUL CHALLENGE

03 Value of challenge

04 / OVERUSE RISKS

Pace without challenge

Challenge without closure

05 Routine

06 Review signals

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X38 Both-and tension map

ACTIVITY

Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Tension

Decision pace and meaningful challenge.

PACE

02 Value of pace

Teams can act and avoid unnecessary waiting.

MEANINGFUL CHALLENGE

03 Value of challenge

Material evidence and consequences are examined before commitment.

04 / OVERUSE RISKS

Pace without challenge

Pace without challenge hides risk.

Challenge without closure

Challenge without closure creates delay and ambiguity.

05 Routine

Circulate the decision question, use a bounded concerns round and close with reasons, owner and conditions.

06 Review signals

Late surprise objections and repeated reopening indicate a need to revisit the routine.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X39

ACTIVITY

Event, interpretation and choice

Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.

Practical guide

Working form

Worked example

EXCEL TAB X39 Event interpretation and ch

TIME 45 minutes

BRING A modest, recent work event | A clear coaching boundary | A written alternative to personal disclosure

RUN THE ACTIVITY

- 01** Describe the event in observable terms, then ask what the coachee told themselves it meant. Keep interpretation separate from the event itself.
- 02** Explore the response that followed: action, avoidance or communication, and the consequence in work. Feelings may be named voluntarily without clinical analysis.
- 03** Examine evidence for and against the interpretation. The aim is not forced positivity but a more balanced account that can guide action.

QUESTIONS TO OPEN THINKING

What meaning did you add to the event?

What evidence supports a different account?

What action would remain useful even while you are uncertain?

CONTINUE THE METHOD

- 04** Generate two alternative interpretations and the actions each would make possible. Check for systemic conditions and legitimate concerns rather than assuming thinking is the only issue.
- 05** Choose a response consistent with evidence, values and role authority. Rehearse a brief opening or question in the actual work language the coachee uses.
- 06** Plan a low-risk test and a review of its consequences. Where the issue moves into significant distress or clinical needs, pause and use an appropriate qualified route.

BOUNDARY & CAUTION

This is a bounded cognitive-behavioural coaching adaptation, not treatment for a mental-health condition or an invitation to dispute a person's lived experience.

BETWEEN SESSIONS / HAND-OFF

Notice one event-interpretation-action sequence and practise the chosen checking question.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X39 Event, interpretation and choice

ACTIVITY

Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.

Guide

Worksheet

Example

LIVE WORKSHEET

EVENT-INTERPRETATION-CHOICE ROUTE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Event

02 Interpretation

03 Response and consequence

04 Balanced account

05 Chosen response

06 Test and review

Basis: H01 / H04 | Original executive application

X39 Event, interpretation and choice

ACTIVITY

Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

EVENT-INTERPRETATION-CHOICE ROUTE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Event

A peer questioned M-07's recommendation in front of the sponsor.

03 Response and consequence

M-07 defended the recommendation quickly and the underlying evidence gap remained unclear.

05 Chosen response

Ask which evidence would change the recommendation, summarise the concern and decide within the agreed boundary.

02 Interpretation

They are trying to undermine my credibility.

04 Balanced account

The question may concern a genuine risk; intent is unknown and can be checked without surrendering authority.

06 Test and review

Use the response at a comparable discussion and review whether the risk became clearer and the decision remained owned.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X40

ACTIVITY

Distanced self-talk for a work decision

Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.

Practical guide

Working form

Worked example

EXCEL TAB X40 Distanced selftalk for a wo

TIME 25 minutes

BRING A current but manageable work dilemma | A private note | An option to decline or use ordinary written reflection

RUN THE ACTIVITY

- 01** Ask the coachee to describe the situation and what decision they face. Keep the exercise short and linked to a real work choice.
- 02** Invite them, if comfortable, to write advice to themselves using their name or you, as though addressing a respected colleague. Explain that this is a perspective experiment, not a cure.
- 03** Ask what the wiser adviser would notice about facts, uncertainty, values and the next practical step. Avoid replacing evidence with reassurance.

QUESTIONS TO OPEN THINKING

What would you advise a respected colleague facing these facts?

What does that adviser not know?

What is the next responsible action?

CONTINUE THE METHOD

- 04** Compare the distanced account with the initial self-talk. Identify what became clearer and what remained unresolved.
- 05** Choose one sentence or question that helps the coachee act responsibly under pressure. Rehearse it before a low-risk upcoming situation.
- 06** Review whether the exercise was useful for this person. Stop using it if it feels artificial, distancing in an unhelpful way or outside the coaching purpose.

BOUNDARY & CAUTION

Research on self-distancing is not evidence that this specific executive exercise will work universally. Do not use it to process trauma or replace qualified care.

BETWEEN SESSIONS / HAND-OFF

Try the prompt once before a demanding but manageable discussion and record whether it helped the decision.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R24 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X40 Distanced self-talk for a work decision

ACTIVITY

Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Situation



02 Initial self-talk



03 Distanced prompt



04 New perspective



05 Action sentence



06 Review

Basis: H01 / R24 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X40 Distanced self-talk for a work decision

ACTIVITY

Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Situation

M-07 is worried that a difficult gate discussion will expose uncertainty.



02 Initial self-talk

I must have an answer to every challenge or I will lose credibility.



03 Distanced prompt

M-07, what would a responsible project director do with uncertainty that matters?



04 New perspective

Make the unknown explicit, use the specialists' authority and define the evidence needed for a decision.



05 Action sentence

I do not yet have that evidence; let us identify who can resolve it and what decision can safely be made now.



06 Review

After the meeting, assess whether this response supported clarity rather than simply reducing discomfort.

Basis: H01 / R24 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X41

ACTIVITY

Compassionate challenge after a setback

Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.

Practical guide

Working form

Worked example

EXCEL TAB X41 Compassionate challenge aft

TIME 35 minutes

BRING A manageable work setback | A private writing space | Permission to stop or keep the reflection practical

RUN THE ACTIVITY

- 01** Ask what happened and what the coachee is saying to themselves about it. Separate the event from a global judgement about their worth or competence.
- 02** Invite a short response in the voice of a fair, caring colleague: acknowledge the difficulty, avoid humiliation and stay honest about consequences.
- 03** Identify what the coachee is responsible for and what was outside their control. Compassion does not remove accountability or formal obligations.

QUESTIONS TO OPEN THINKING

What would a fair colleague say that is both kind and true?

What responsibility is yours?

What would repair look like to the person affected?

CONTINUE THE METHOD

- 04** Ask what can be repaired, learned or practised. Prioritise the affected person's needs rather than seeking reassurance that the executive is a good person.
- 05** Choose one repair or learning action and one realistic support. Rehearse a specific acknowledgement where appropriate.
- 06** Close with a practical review date and ask whether the activity was useful. Do not insist on an emotional breakthrough.

BOUNDARY & CAUTION

Keep the exercise optional and within competence. It is not psychotherapy, and it must not be used to minimise misconduct or pressure another person to reconcile.

BETWEEN SESSIONS / HAND-OFF

Complete the repair action where appropriate and bring evidence of what the other person actually needed.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R16 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X41 Compassionate challenge after a setback

ACTIVITY

Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Setback

02 Harsh judgement

03 Fair account



04 Responsibility

05 Repair action

06 Learning step

Basis: H01 / R16 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X41 Compassionate challenge after a setback

ACTIVITY

Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Setback

M-07 interrupted a specialist and closed discussion before a concern was understood.

02 Harsh judgement

I am incapable of leading this team well.

03 Fair account

This was an unhelpful behaviour in a pressured meeting, not a complete account of M-07's leadership.

04 Responsibility

Acknowledge the interruption and create a proper opportunity to hear the concern.

05 Repair action

Speak to the specialist, name the behaviour and ask what remains unresolved, without demanding forgiveness.

06 Learning step

Practise summarising a challenge before responding at the next meeting.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X42

ACTIVITY

Ambivalence conversation

Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.

Practical guide

Working form

Worked example

EXCEL TAB X42 Ambivalence conversation

TIME 45 minutes

BRING A behaviour the coachee is considering changing | Permission to explore uncertainty | No hidden sponsor requirement for a predetermined answer

RUN THE ACTIVITY

- 01** Ask what the coachee is considering and why the question matters now. Establish that the purpose is understanding, not persuading them to accept the coach's preferred action.
- 02** Explore what the current behaviour provides, including legitimate protection, efficiency or identity. Do not label every reason to stay as resistance.
- 03** Explore what concerns the coachee about continuing and what attracts them to a different practice. Reflect both sides accurately without stacking the argument.

QUESTIONS TO OPEN THINKING

What does the current approach do for you?

What concerns you about keeping it?

What, if anything, are you ready to try?

CONTINUE THE METHOD

- 04** Ask what would make change feasible and worthwhile. Distinguish importance from confidence and from the practical opportunity to act.
- 05** Invite the coachee to choose a next step, including further exploration, a small test or no change. Where an organisational requirement is mandatory, disclose it rather than presenting it as free choice.
- 06** Summarise their own reasons and chosen action. Review whether the conversation increased clarity and agency.

BOUNDARY & CAUTION

This activity is informed by motivational interviewing principles but does not confer MI competence. Never use it to covertly secure compliance with a sponsor's agenda.

BETWEEN SESSIONS / HAND-OFF

Write your own reasons for the experiment and the conditions under which you would revise it.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R11 / R21 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X42 Ambivalence conversation

ACTIVITY

Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.

Guide

Worksheet

Example

LIVE WORKSHEET

AMBIVALENCE BALANCE MAP



Reasons to change



Reasons not to change



What matters most



A freely chosen next step

Explore the ambivalence without persuading the coachee towards a preselected answer.

01 Current practice

02 Reasons to keep it

03 Reasons to change

04 Conditions needed

05 Chosen next step

06 Review

Basis: H01 / R11 / R21 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X42 Ambivalence conversation

ACTIVITY

Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

AMBIVALENCE BALANCE MAP



Reasons to change



Reasons not to change



What matters most



A freely chosen next step

Explore the ambivalence without persuading the coachee towards a preselected answer.

01 Current practice

M-07 personally checks every major draft before circulation.

02 Reasons to keep it

Quality assurance feels dependable and surprises are less visible at the gate.

03 Reasons to change

The approach delays ownership and leaves little time for strategic preparation.

04 Conditions needed

Explicit evidence standards, reliable checkpoints and clear escalation authority.

05 Chosen next step

Test a bounded delegation on one recommendation, not abandon oversight entirely.

06 Review

Discuss whether the test protected quality and allowed another person to own the reasoning.

Basis: H01 / R11 / R21 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X43

ACTIVITY

Ladder of inference check

Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.

Practical guide

Working form

Worked example

EXCEL TAB X43 Ladder of inference check

TIME 40 minutes

BRING One interaction or decision | A simple sequence: observation, selection, meaning, assumption, conclusion, action | Relevant evidence

RUN THE ACTIVITY

- 01** Reconstruct the action the coachee took and work backwards to the conclusion that supported it. Do not begin by declaring the conclusion wrong.
- 02** Identify the observations selected from the event and what may have been left out. Ask how role, pressure or prior experience shaped attention.
- 03** Separate meanings and assumptions from directly observed information. Write each in its own line so the jump becomes visible.

QUESTIONS TO OPEN THINKING

What did you select from everything that happened?

Where did a meaning become a fact in your account?

What question could interrupt the jump?

CONTINUE THE METHOD

- 04** Explore a plausible alternative path using the same observations. The coach should include their own assumptions in the check rather than claim objectivity.
- 05** Choose a point at which the coachee could pause, seek evidence or ask a neutral question before acting.
- 06** Rehearse that question and plan a work application. Retain uncertainty where the other person's intention is not known.

BOUNDARY & CAUTION

The sequence is an explanatory aid, not a validated assessment of bias or proof of another person's motives.

BETWEEN SESSIONS / HAND-OFF

Use the checking question once and record whether new information changed the conclusion.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X43 Ladder of inference check

ACTIVITY

Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.

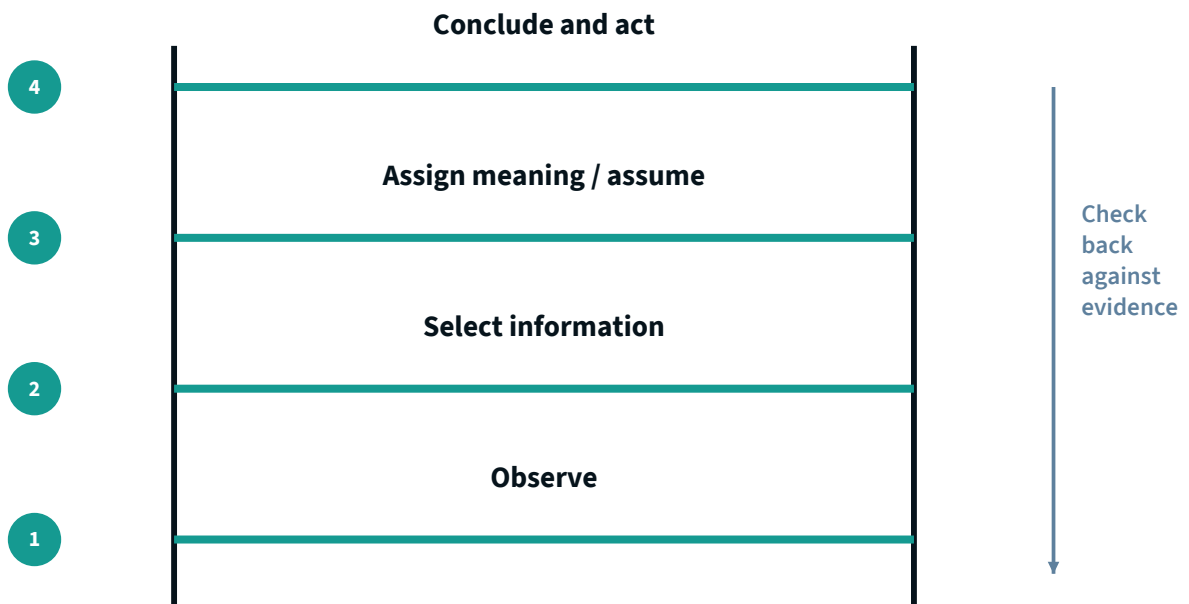
Guide

Worksheet

Example

LIVE WORKSHEET

LADDER WITH EVIDENCE-CHECK RETURN



Climb the interpretation path, then return to observations and ask a checking question.

01 Observation

02 Selected information

03 Meaning and assumption

04 Conclusion and action

05 Alternative path

06 Checking question

Basis: H01 / H04 | Original executive application

X43 Ladder of inference check

ACTIVITY

Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

LADDER WITH EVIDENCE-CHECK RETUP^M



Climb the interpretation path, then return to observations and ask a checking question.

01 Observation

The commercial lead asked for another day before endorsing the recommendation.

03 Meaning and assumption

The lead is avoiding commitment and expects M-07 to decide alone.

05 Alternative path

The lead may need time to validate a material cost assumption within their responsibility.

02 Selected information

M-07 focused on the delay and not the new cost assumption mentioned earlier.

04 Conclusion and action

M-07 escalated the issue as a lack of ownership.

06 Checking question

Which assumption needs checking, what decision could it change, and when can you provide the evidence?

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X44

ACTIVITY

Competing commitments inquiry

Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.

Practical guide

Working form

Worked example

EXCEL TAB X44 Competing commitments inqui

TIME 60 minutes; experienced coach recommended

BRING A self-chosen development goal | A specific recurring behaviour | Consent to explore assumptions, with a right to stop

RUN THE ACTIVITY

- 01** Ask the coachee to choose a change they genuinely want, rather than a sponsor's unexamined demand. Describe it through observable work.
- 02** Identify actions or omissions that appear to work against the goal. Keep the account descriptive and avoid shame or a diagnosis of sabotage.
- 03** Explore what might be at risk if the person acted differently. Offer hypotheses lightly; the coachee decides whether a competing commitment fits.

CONTINUE THE METHOD

- 04** State the assumption connecting the feared consequence to the current behaviour. Ask where it may be true and where it may be overgeneralised.
- 05** Design a small, safe test of the assumption that does not require abandoning a legitimate responsibility or exposing private material.
- 06** Review what was learned and revise the hypothesis. The aim is greater choice, not proving that the person has a hidden psychological block.

QUESTIONS TO OPEN THINKING

What important concern might this behaviour be protecting?

What are you assuming would happen if you changed it?

What safe test could give us better evidence?

BOUNDARY & CAUTION

Do not force hidden-commitment interpretations, personal disclosure or unsafe tests. This is a bounded educational adaptation, not the licensed full method or clinical treatment.

BETWEEN SESSIONS / HAND-OFF

Choose whether the hypothesis fits. Test only a small assumption that can be examined safely and ethically.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R14 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X44 Competing commitments inquiry

ACTIVITY

Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Stated goal	02 Counter-behavior	03 Possible competing commitment	04 Assumption

Test the assumption; do not diagnose the person.

05 Safe test	06 Learning criterion

Basis: H01 / H04 / R14 | Original executive application

01 Align

02 Agree

03 Assess

04 **Activate**

05 Apply

06 Assure

X44 Competing commitments inquiry

ACTIVITY

Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Stated goal

M-07 wants specialists to retain more ownership of recommendations.

02 Counter-behavior

M-07 rewrites drafts before the agreed checkpoint.

03 Possible competing commitment

Avoid being seen as the director who allowed a material gap to reach the sponsor.

04 Assumption

If I do not personally inspect every detail, serious problems will go unnoticed and I will be blamed.

Test the assumption; do not diagnose the person.

05 Safe test

On one routine recommendation, use agreed assurance criteria and a checkpoint instead of continuous rewriting.

06 Learning criterion

Check whether material gaps were identified through the agreed process and whether ownership remained clear.

Basis: H01 / H04 / R14 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X45

ACTIVITY

Courage through graded rehearsal

Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.

Practical guide

Working form

Worked example

EXCEL TAB X45 Courage through graded rehe

TIME 45 minutes plus short rehearsals

BRING A specific behaviour such as raising a risk | A low-risk practice opportunity | Clear operational and interpersonal boundaries

RUN THE ACTIVITY

- 01** Define the behaviour and why it matters. Ask what makes it difficult without assuming the person has a confidence deficit.
- 02** Break the task into progressively more demanding but safe steps, such as writing an opening, practising with the coach and using it in a routine meeting.
- 03** Let the coachee choose the first step and define what successful practice means. Avoid forcing exposure to hostile, discriminatory or unsafe situations.

QUESTIONS TO OPEN THINKING

What is the smallest useful version of this behaviour?

What support makes it safe enough to try?

What did practice show that confidence alone could not?

CONTINUE THE METHOD

- 04** Rehearse the step, pause and give specific feedback on the behaviour. Repeat with one adjustment rather than many corrections.
- 05** Agree a real application, support and a stop or escalation condition. The coachee does not need to feel entirely comfortable before a legitimate action.
- 06** Review evidence of practice and learning separately from feelings of confidence. Progress may include deciding that a system response is needed.

BOUNDARY & CAUTION

This is work-skill rehearsal, not exposure therapy. Do not use it for clinical anxiety, trauma or unsafe workplace conditions.

BETWEEN SESSIONS / HAND-OFF

Complete the agreed first real-world step and record the behaviour, response and learning.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X45 Courage through graded rehearsal

ACTIVITY

Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.

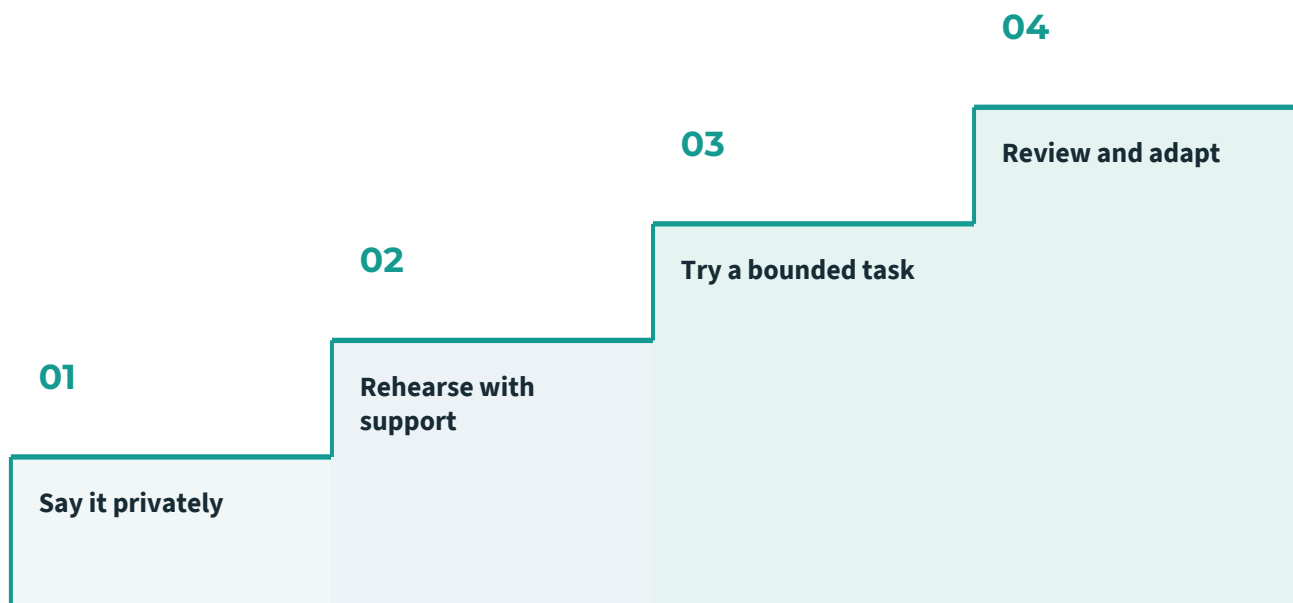
Guide

Worksheet

Example

LIVE WORKSHEET

GRADED-REHEARSAL STAIRCASE



Agree the sequence, permission and support. A higher step is not an automatic competence claim.

01 Target behaviour

02 Practice ladder

03 First step

04 Feedback

05 Support and boundary

06 Review

Basis: H01 / H04 | Original executive application

X45 Courage through graded rehearsal

ACTIVITY

Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.

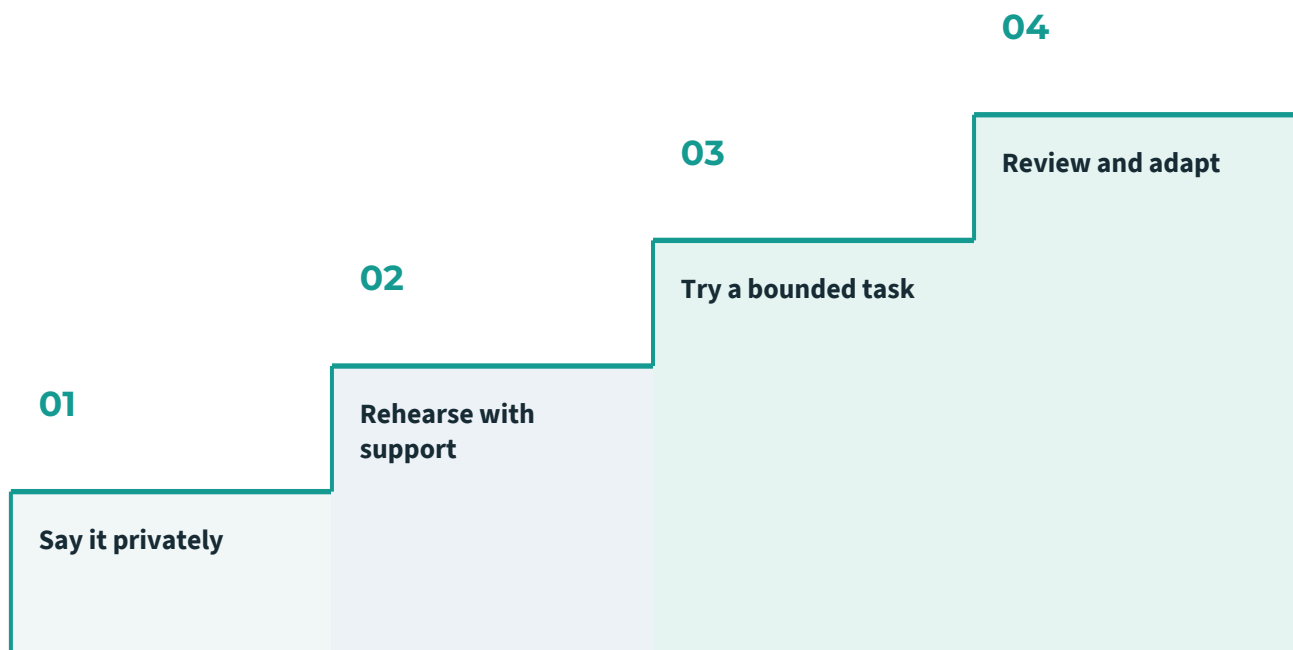
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

GRADED-REHEARSAL STAIRCASE



Agree the sequence, permission and support. A higher step is not an automatic competence claim.

01 Target behaviour

Raise a material evidence gap before a gate recommendation is endorsed.

02 Practice ladder

Write the question; rehearse with the coach; use it in a routine review; then apply it at the formal gate.

03 First step

Practise a 30-second statement naming the gap and the decision it could affect.

04 Feedback

The first attempt sounded accusatory; the revised version asks for evidence and clarifies responsibility.

05 Support and boundary

Engineering lead confirms the issue is appropriate to raise; urgent safety concerns use formal escalation.

06 Review

Record whether the question was asked, understood and acted on, not merely whether M-07 felt confident.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X46

ACTIVITY

Difficult conversation rehearsal

Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.

Practical guide

Working form

Worked example

EXCEL TAB X46 Difficult conversation rehe

TIME 60 minutes

BRING A real conversation within the coachee's authority | Relevant facts and desired outcome | A role-play agreement and pause signal

RUN THE ACTIVITY

- 01** Clarify the purpose, relationship and non-negotiable requirements. Separate a coaching conversation from a formal disciplinary, grievance or legal process.
- 02** Prepare a short opening using observable facts, impact and a genuine question. Avoid rehearsing an accusation about intent.
- 03** Ask the coachee to play themselves while the coach gives a plausible, not caricatured response. Pause after the opening to examine clarity and tone.

CONTINUE THE METHOD

- 04** Rehearse listening and summarising before responding. Introduce one realistic disagreement, then practise acknowledging it without abandoning legitimate boundaries.
- 05** Close with a concrete agreement, disagreement or next process step, including owner and time. Do not force consensus or an apology.
- 06** Debrief what worked, what felt artificial and what needs proper specialist preparation. Agree a follow-up after the real conversation.

QUESTIONS TO OPEN THINKING

What must be clear by the end?

What might the other person reasonably see differently?

How will you know whether an agreement was actually made?

BOUNDARY & CAUTION

Do not coach someone to manipulate, threaten or bypass formal employment procedures. Obtain appropriate advice for consequential or legally sensitive conversations.

BETWEEN SESSIONS / HAND-OFF

Hold the conversation when properly prepared; afterwards use X67 to review what actually happened.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R12 / R15 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X46 Difficult conversation rehearsal

ACTIVITY

Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Conversation



02 Opening



03 Likely response



04 Listening response



05 Boundary and agreement



06 Follow-up

Basis: H01 / R12 / R15 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X46 Difficult conversation rehearsal

ACTIVITY

Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Conversation

M-07 needs to discuss repeated late evidence with a commercial peer.



02 Opening

The last two cost updates arrived after the preparation deadline, which limited the review. What is getting in the way?



03 Likely response

The peer says the deadline ignores supplier response times.



04 Listening response

You are saying the current deadline is not controllable because a supplier input arrives later. Which part can we change together?



05 Boundary and agreement

Mandatory cost assumptions must be visible before endorsement; agree an early provisional update and a named exception route.



06 Follow-up

Review the next cycle and adjust the process if the supplier dependency remains.

Basis: H01 / R12 / R15 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X47

ACTIVITY

Negotiation interests and boundaries

Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.

Practical guide

Working form

Worked example

EXCEL TAB X47 Negotiation interests and b

TIME 55 minutes

BRING A genuine negotiation | Known authority and constraints | Evidence about options and dependencies

RUN THE ACTIVITY

- 01** Define the issue and the decision each party can make. Identify where the coachee lacks authority and must obtain approval before negotiating.
- 02** Separate stated positions from underlying interests, including the other party's possible interests as hypotheses to check. Do not assume you know their motives.
- 03** Identify feasible alternatives if agreement is not reached and the costs of delay. Avoid bluffing or inventing an alternative to create pressure.

QUESTIONS TO OPEN THINKING

What matters beneath each stated position?

What can you actually agree today?

What is your legitimate alternative if no agreement is reached?

CONTINUE THE METHOD

- 04** Generate options that could meet more than one interest. Test them against mandatory requirements, fairness and operational feasibility.
- 05** Rehearse questions, a clear proposal and a respectful boundary. Practise what the coachee will do if the discussion becomes coercive or unsafe.
- 06** Record agreement terms, outstanding approvals and review arrangements. A friendly conversation is not the same as an authorised agreement.

BOUNDARY & CAUTION

Negotiation preparation is not legal or procurement advice. Do not encourage deception, discriminatory leverage or commitments beyond authority.

BETWEEN SESSIONS / HAND-OFF

Check one assumed interest with the other party and update the proposal before negotiating.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R15 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X47 Negotiation interests and boundaries

ACTIVITY

Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.

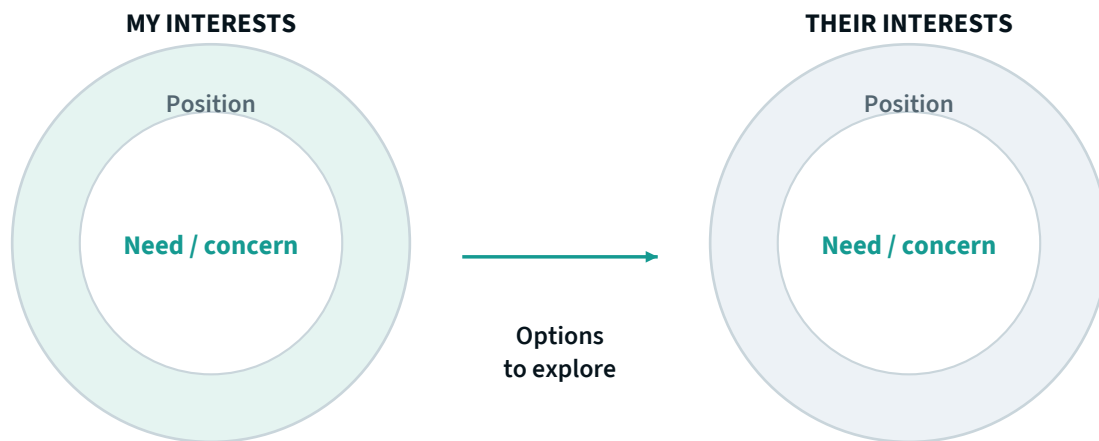
Guide

Worksheet

Example

LIVE WORKSHEET

NEGOTIATION INTERESTS MAP



BOUNDARIES / AUTHORITY / A WORKABLE AGREEMENT

Distinguish stated positions from interests; verify the other person's account rather than assuming it.

01 Issue

02 M-07's interests

03 Other interests to check

04 Authority and limits

05 Proposal and alternative

06 Agreement record

Basis: H01 / R15 | Original executive application

X47 Negotiation interests and boundaries

ACTIVITY

Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.

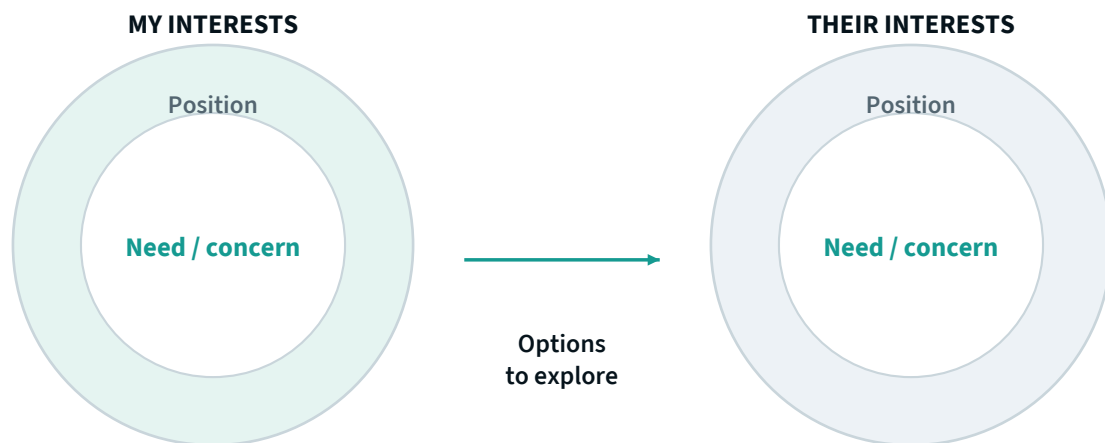
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Example

FICTIONAL WORKED EXAMPLE

NEGOTIATION INTERESTS MAP



BOUNDARIES / AUTHORITY / A WORKABLE AGREEMENT

Distinguish stated positions from interests; verify the other person's account rather than assuming it.

01 Issue

Agree an earlier provisional cost update without overloading the commercial team.

03 Other interests to check

Commercial accuracy, supplier dependencies and avoiding repeated rework.

05 Proposal and alternative

Trial a provisional update with explicit assumptions; if infeasible, escalate the dependency with joint evidence.

02 M-07's interests

A usable gate brief and visible uncertainty before endorsement.

04 Authority and limits

M-07 can agree a process trial, not change contractual supplier obligations.

06 Agreement record

One-cycle trial, named owners, minimum content and a review before making it standard.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X48

ACTIVITY

Conflict response choice

Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.

Practical guide

Working form

Worked example

EXCEL TAB X48 Conflict response choice

TIME 45 minutes

BRING One current disagreement | An authorised Conflict Response Assessment only if relevant | A clear account of stakes, time and relationship

RUN THE ACTIVITY

- 01** Describe the disagreement, what matters to each party and any non-negotiable requirements. Distinguish a legitimate difference from misconduct or a safety issue.
- 02** Identify the coachee's usual response in this situation and its actual consequences. An assessment profile may offer language, but it does not determine the right response.
- 03** Generate alternatives such as direct assertion, collaborative exploration, a temporary pause or a bounded compromise. Discuss what each protects and risks here.

QUESTIONS TO OPEN THINKING

What is the disagreement really about?

What does your usual response protect, and what does it cost?

What would make a different response appropriate here?

CONTINUE THE METHOD

- 04** Choose a response based on stakes, time, authority and the other party's ability to participate. Avoid treating collaboration as mandatory in every circumstance.
- 05** Rehearse the opening and the point at which the executive would pause, escalate or change approach.
- 06** Review the actual interaction later, including whether the chosen response respected both the task and the people affected.

BOUNDARY & CAUTION

Do not use conflict styles to label colleagues or require reconciliation in cases of harm. Formal and specialist routes remain available.

BETWEEN SESSIONS / HAND-OFF

Try the agreed response in an appropriate situation and collect evidence of its effect, not just whether conflict reduced.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H05 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X48 Conflict response choice

ACTIVITY

Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.

Guide

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Example

LIVE WORKSHEET

CONFLICT-RESPONSE CHOICE MAP



Pause and clarify



Ask and listen



State a boundary



Use a formal route

Choose for this situation, with power, safety and purpose in view. This is not a fixed conflict type.

01 Disagreement

02 Usual response

03 Cost

04 Alternative

05 Opening

06 Review

Basis: H01 / H05 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X48 Conflict response choice

ACTIVITY

Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.

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Example

FICTIONAL WORKED EXAMPLE

CONFLICT-RESPONSE CHOICE MAP



Pause and clarify



Ask and listen



State a boundary



Use a formal route

Choose for this situation, with power, safety and purpose in view. This is not a fixed conflict type.

01 Disagreement

Engineering and commercial leads differ on whether evidence is sufficient for a conditional decision.

02 Usual response

M-07 tries to settle the issue quickly by proposing a compromise.

03 Cost

The compromise may obscure a mandatory technical requirement that is not negotiable.

04 Alternative

Clarify the non-negotiable assurance, then explore options for the remaining commercial uncertainty.

05 Opening

Which part is a required standard, and which part is a judgement we can make within conditions?

06 Review

Check whether the disagreement produced a clearer decision rather than merely a quieter meeting.

Basis: H01 / H05 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X49

ACTIVITY

SBI feedback rehearsal

Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.

Practical guide

Working form

Worked example

EXCEL TAB X49 SBI feedback rehearsal

TIME 40 minutes

BRING A recent, relevant work episode | Permission and an appropriate setting | A desired developmental or operational purpose

RUN THE ACTIVITY

- 01** Choose an episode that the coachee directly observed. Clarify whether feedback is the right response or whether a formal process is needed.
- 02** Write a precise situation, the observable behaviour and its impact on the work or on the speaker. Avoid global labels, mind-reading and statements presented as everyone's view.
- 03** Read the feedback aloud and remove unnecessary judgement. Own the perspective and distinguish actual consequences from feared ones.

CONTINUE THE METHOD

- 04** Add an inquiry about the other person's view or intention. Practise listening to an explanation without automatically withdrawing the impact statement.
- 05** Agree a useful next conversation or action, without prescribing a solution before understanding the context.
- 06** Rehearse a second version and decide when to use it. Review whether the feedback was understood and what changed afterwards.

QUESTIONS TO OPEN THINKING

What did you directly see or hear?

What impact can you honestly own?

What do you need to understand from the other person?

BOUNDARY & CAUTION

Feedback must not be a disguised attack or an invented consensus. Do not use a coaching rehearsal to bypass formal duties or specialist procedures.

BETWEEN SESSIONS / HAND-OFF

Use the feedback when appropriate and ask the recipient what they understood, without demanding agreement.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R12 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X49 SBI feedback rehearsal

ACTIVITY

Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.

Guide

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Example

LIVE WORKSHEET

S

B

I

01 Situation



02 Behaviour



03 Impact

04 Inquiry

05 Next step

06 Rehearsal learning

Basis: H01 / R12 | Original executive application

X49 SBI feedback rehearsal

ACTIVITY

Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

S

B

I

01 Situation

At Tuesday's gate review, during the discussion of the cost assumption.



02 Behaviour

The recommendation was endorsed before the commercial lead finished explaining the unresolved input.



03 Impact

I left unclear whether the assumption had been accepted or still needed checking.

04 Inquiry

What was your understanding of the decision at that point?

05 Next step

Agree how unresolved assumptions will be stated before endorsement at the next review.

06 Rehearsal learning

Replace you always rush with the specific sequence and its consequence.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X50

ACTIVITY

Ask for feedforward

Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.

Practical guide

Working form

Worked example

EXCEL TAB X50 Ask for feedforward

TIME 30 minutes preparation/debrief; 10 minutes per conversation

BRING One self-chosen behavioural goal | Two trusted contributors | A request that does not create pressure to praise

RUN THE ACTIVITY

- 01** Define the future behaviour in specific work terms. Avoid asking how to be a better leader in general.
- 02** Choose contributors who understand the work and can offer relevant suggestions. Explain that participation is optional and not a request to rate the person.
- 03** Rehearse a short request: I am working on this behaviour; what one or two actions might help in this situation?

CONTINUE THE METHOD

- 04** Listen, clarify and record suggestions without arguing each one. The coachee may thank the person without promising to follow all advice.
- 05** Compare suggestions with the goal, authority, values and context. Select one idea to test and explain why others are not being used now.
- 06** Agree a small work experiment and a follow-up. Do not turn the exercise into a popularity contest or evidence of a guaranteed improvement.

QUESTIONS TO OPEN THINKING

What exact future behaviour are you asking about?

Which suggestion fits the work and your authority?

How will you test it rather than simply collect advice?

BOUNDARY & CAUTION

Future suggestions complement rather than replace necessary feedback about actual harm, performance or required standards.

BETWEEN SESSIONS / HAND-OFF

Make the agreed requests, select one suggestion and bring a record of the experiment, not just the advice received.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R13 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X50 Ask for feedforward

ACTIVITY

Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.

Guide

Worksheet

Example

LIVE WORKSHEET

FEEDFORWARD LISTENING ROUTE

01

Ask for future ideas

02

Listen without defending

03

Choose what to try


WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

Use consented, proportionate notes. Do not promise anonymity that the setting cannot support.

01 Goal

02 Contributors

03 Request

04 Suggestions

05 Choice

06 Follow-up

Basis: H01 / R13 | Original executive application

X50 Ask for feedforward

ACTIVITY

Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

FEEDFORWARD LISTENING ROUTE

01

Ask for future ideas

02

Listen without defending

03

Choose what to try

What mattered?

What happened?

What else explains it?

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

Use consented, proportionate notes. Do not promise anonymity that the setting cannot support.

01 Goal

Invite useful challenge before stating a gate recommendation.

02 Contributors

A commercial peer and a delivery coordinator, both participating voluntarily.

03 Request

What one or two actions would help people raise a concern early in the review?

04 Suggestions

Circulate the decision question and ask each function what could change the recommendation.

05 Choice

M-07 will test the question-first brief and a short concerns round.

06 Follow-up

After one gate, ask whether the opportunity to contribute was clearer; no rating of personal worth is requested.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X51

ACTIVITY

Boundary-setting and saying no

Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.

Practical guide

Working form

Worked example

EXCEL TAB X51 Boundarysetting and saying

TIME 45 minutes

BRING A request the coachee needs to accept, modify or decline | Actual authority and capacity | A realistic alternative if one exists

RUN THE ACTIVITY

- 01** Clarify the request, its legitimate purpose and the coachee's responsibility. Do not assume that every uncomfortable request should be declined.
- 02** Identify the constraint: authority, capacity, priority, quality or ethics. Check that it is real and not an untested assumption.
- 03** Prepare a response that acknowledges the purpose, states the boundary and explains the relevant trade-off briefly. Avoid long excuses or invented commitments.

CONTINUE THE METHOD

- 04** Offer an alternative only where it is feasible and within authority. The alternative might be a different date, reduced scope or a sponsor decision about priorities.
- 05** Rehearse a persistent response from the requester and practise maintaining the boundary without escalating hostility.
- 06** Record the decision and any consequences requiring follow-up. Review whether the boundary protected the work without simply transferring burden to another person.

QUESTIONS TO OPEN THINKING

What are you responsible for saying yes to?

Which constraint needs to be stated clearly?

What decision should the requester or sponsor own?

BOUNDARY & CAUTION

Do not use boundary language to evade duties, deny reasonable access or disregard an urgent safety obligation. Seek appropriate advice when obligations are unclear.

BETWEEN SESSIONS / HAND-OFF

Use the response in a legitimate situation and record the trade-off that was actually agreed.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X51 Boundary-setting and saying no

ACTIVITY

Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.

Guide

Worksheet

Example

LIVE WORKSHEET

BOUNDARY-SETTING RESPONSE STRIP

1

2

3

4

Acknowledge purpose



State the boundary



Offer an alternative



Confirm the next owner

Respectful does not mean vague. Clear does not mean dismissive.

Rehearse an actual sentence and listen to its likely effect; retain non-negotiable duties.

01 Request

02 Constraint

03 Response

04 Alternative

05 Persistent challenge

06 Follow-up

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X51 Boundary-setting and saying no

ACTIVITY

Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

BOUNDARY-SETTING RESPONSE STRIP

1

2

3

4

Acknowledge purpose



State the boundary



Offer an alternative



Confirm the next owner

Respectful does not mean vague. Clear does not mean dismissive.

Rehearse an actual sentence and listen to its likely effect; retain non-negotiable duties.

01 Request

Add a new analysis to tomorrow's gate pack without changing existing commitments.

02 Constraint

The team cannot complete the analysis and the mandatory assurance checks to a proper standard in the available time.

03 Response

We can complete the assurance checks for tomorrow. The new analysis needs another day or a decision to defer a lower-priority item.

04 Alternative

Provide a bounded preliminary view labelled as incomplete, only if the decision owner accepts its limitations.

05 Persistent challenge

M-07 repeats the quality and capacity trade-off rather than promising that the team will somehow manage.

06 Follow-up

Record the sponsor's priority decision and check that no colleague inherits an unacknowledged overload.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X52

ACTIVITY

Ethical dilemma rehearsal

Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.

Practical guide

Working form

Worked example

EXCEL TAB X52 Ethical dilemma rehearsal

TIME 60 minutes

BRING A fictionalised or safely bounded dilemma | Applicable policies and professional duties | A qualified advice route

RUN THE ACTIVITY

- 01** Describe the dilemma without unnecessary identifying information. Distinguish known facts, allegations, uncertainty and immediate risk.
- 02** Identify affected people, including those with little voice, and the duties attached to the executive's role. The coach must not assume legal or professional authority they do not hold.
- 03** Explore feasible options and likely consequences. Test each against mandatory requirements, dignity, fairness, confidentiality and the possibility of harm.

QUESTIONS TO OPEN THINKING

Who is affected but not represented?

What duty cannot be traded away?

Who is qualified to advise on the part we cannot settle here?

CONTINUE THE METHOD

- 04** Ask what advice or evidence is needed and who is qualified to provide it. Do not let the desire for a quick coaching answer replace a formal process.
- 05** Rehearse the next responsible action: pausing a decision, seeking advice, documenting a concern or communicating a boundary.
- 06** Record the reasoning, advice route and review point. Keep sensitive details outside routine coaching records where required.

BOUNDARY & CAUTION

This is ethical reflection, not legal advice or an investigation. Immediate risk and formal reporting duties take priority over completing the worksheet.

BETWEEN SESSIONS / HAND-OFF

Identify the actual advice route before using the rehearsal in a live consequential situation.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X52 Ethical dilemma rehearsal

ACTIVITY

Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.

Guide

Worksheet

Example

LIVE WORKSHEET

ETHICAL-DILEMMA LENS MAP

1

Whose interests?

2

What duties / limits?

3

What consequences?

4

Who has authority?

Do not use reflection to bypass a required formal decision.

Work within competence and authority; identify the qualified route when the issue exceeds coaching.

01 Dilemma

02 Facts and uncertainty

03 Affected interests

04 Boundary

05 Next action

06 Review

Basis: H01 / H04 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X52 Ethical dilemma rehearsal

ACTIVITY

Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.

Guide

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Example

FICTIONAL WORKED EXAMPLE

ETHICAL-DILEMMA LENS MAP

1

Whose interests?

2

What duties / limits?

3

What consequences?

4

Who has authority?

Do not use reflection to bypass a required formal decision.

Work within competence and authority; identify the qualified route when the issue exceeds coaching.

01 Dilemma

A sponsor asks M-07 to omit an unresolved condition from a gate summary to avoid concern.

03 Affected interests

Delivery team, technical owners, investment governance and people relying on the decision.

05 Next action

Ask for clarification, retain the condition and seek the appropriate governance or ethics advice if pressure continues.

02 Facts and uncertainty

The condition is material; the sponsor's intended meaning and decision authority need clarification.

04 Boundary

The record must not misrepresent the evidence or conceal a mandatory condition.

06 Review

Document the authorised decision and ensure the team understands what has and has not been approved.

Basis: H01 / H04 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X53

ACTIVITY

Metaphor as a thinking aid

Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.

Practical guide

Working form

Worked example

EXCEL TAB X53 Metaphor as a thinking aid

TIME 35 minutes

BRING A current work challenge | Permission to use imagery or a plain-language alternative | Paper or a verbal description

RUN THE ACTIVITY

- 01** Ask whether a metaphor or image would help the coachee think about the situation. Offer a plain-language route and do not insist on creativity.
- 02** Invite the coachee to describe their own image, such as a traffic controller or a bridge. Ask what each element means to them rather than interpreting it.
- 03** Explore what the image helps them notice and what it leaves out. A metaphor is selective and may oversimplify relationships or authority.

QUESTIONS TO OPEN THINKING

What does that image mean to you?

What does it hide or oversimplify?

What would the change look like in an actual meeting?

CONTINUE THE METHOD

- 04** Ask what small change to the image would represent a useful change in work. Translate the change back into an observable behaviour or process.
- 05** Check that the proposed action fits actual evidence and responsibilities. Do not make a major decision solely because a metaphor feels powerful.
- 06** Capture the practical insight and an experiment, then set the image aside if it stops helping.

BOUNDARY & CAUTION

Do not interpret drawings or metaphors as diagnostic evidence, hidden trauma or unconscious truth. The coachee controls meaning and disclosure.

BETWEEN SESSIONS / HAND-OFF

Use the practical action once; keep the metaphor only if it continues to clarify the work.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X53 Metaphor as a thinking aid

ACTIVITY

Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.

Guide

Worksheet

Example

LIVE WORKSHEET

METAPHOR DRAWING AND INQUIRY SPACE

Draw or describe your image here.

TEST THE IMAGE

What does it reveal?

What does it miss?

What changes in work?

Retained example: air-traffic controller. Use the coachee's own metaphor, not an imposed interpretation.

01 Image

02 Meaning

03 What it reveals

04 What it misses

05 Practical alternative

06 Experiment

Basis: H01 / H04 | Original executive application

X53 Metaphor as a thinking aid

ACTIVITY

Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.

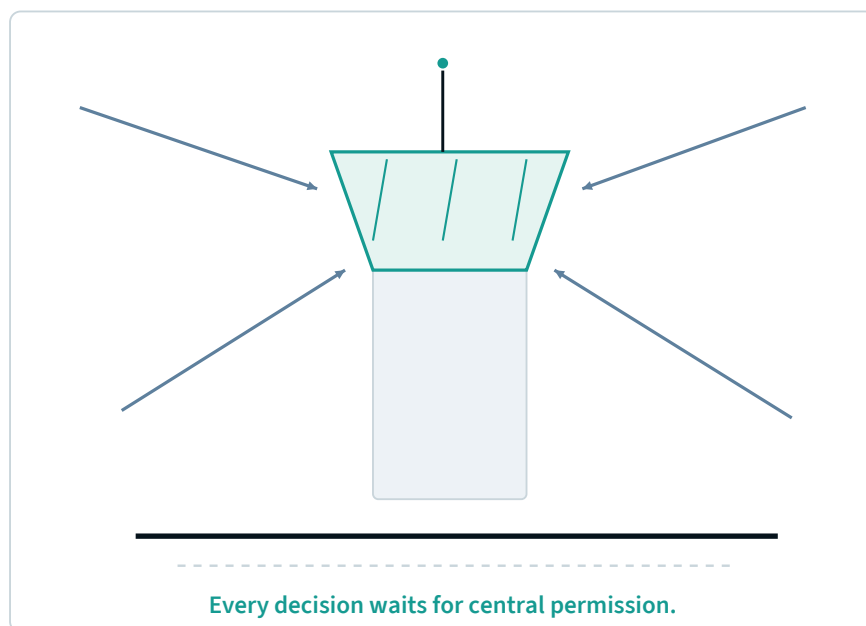
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Example

FICTIONAL WORKED EXAMPLE

METAPHOR DRAWING AND INQUIRY SPACE



TEST THE IMAGE

What does it reveal?

What does it miss?

What changes in work?

Retained example: air-traffic controller. Use the coachee's own metaphor, not an imposed interpretation.

01 Image

M-07 describes being an air-traffic controller for every project decision.

02 Meaning

All requests wait for their permission and the role feels overloaded.

03 What it reveals

The executive is a bottleneck in routine decisions as well as material trade-offs.

04 What it misses

Specialists already hold authority for several decisions and do not need central permission.

05 Practical alternative

Create explicit decision boundaries and escalation criteria rather than trying to control every route.

06 Experiment

Delegate one routine recommendation and review whether it moved without unnecessary waiting.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X54

ACTIVITY

Future leadership identity in practice

Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.

Practical guide

Working form

Worked example

EXCEL TAB X54 Future leadership identity

TIME 50 minutes

BRING Role mandate | A desired future contribution | Evidence of current strengths and constraints

RUN THE ACTIVITY

- 01** Ask how the coachee wants to be experienced in their role and why that matters. Distinguish personal aspiration from an image they feel pressured to perform.
- 02** Translate the desired description into three observable practices. For example, a thoughtful integrator asks for different evidence and makes the trade-off explicit.
- 03** Find current episodes that already show part of the desired practice. Preserve continuity rather than suggesting the person must become someone entirely different.

QUESTIONS TO OPEN THINKING

Whose ideal are you trying to meet?

What would this description look like in a decision?

What part of it is already present?

CONTINUE THE METHOD

- 04** Identify a tension between the aspiration and a current habit, including what the habit protects. Explore system conditions that support or obstruct the desired behaviour.
- 05** Choose one small identity-consistent action for the next fortnight. Define a boundary and feedback source so the exercise remains grounded in work.
- 06** Review action and impact rather than asking whether the coachee has become their ideal self. Allow the aspiration to evolve as the role changes.

BOUNDARY & CAUTION

Do not impose a culturally narrow executive ideal or require the coachee to suppress identity, values or legitimate emotion to appear credible.

BETWEEN SESSIONS / HAND-OFF

Practise the one chosen behaviour and ask a trusted colleague what they actually experienced.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R21 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X54 Future leadership identity in practice

ACTIVITY

Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.

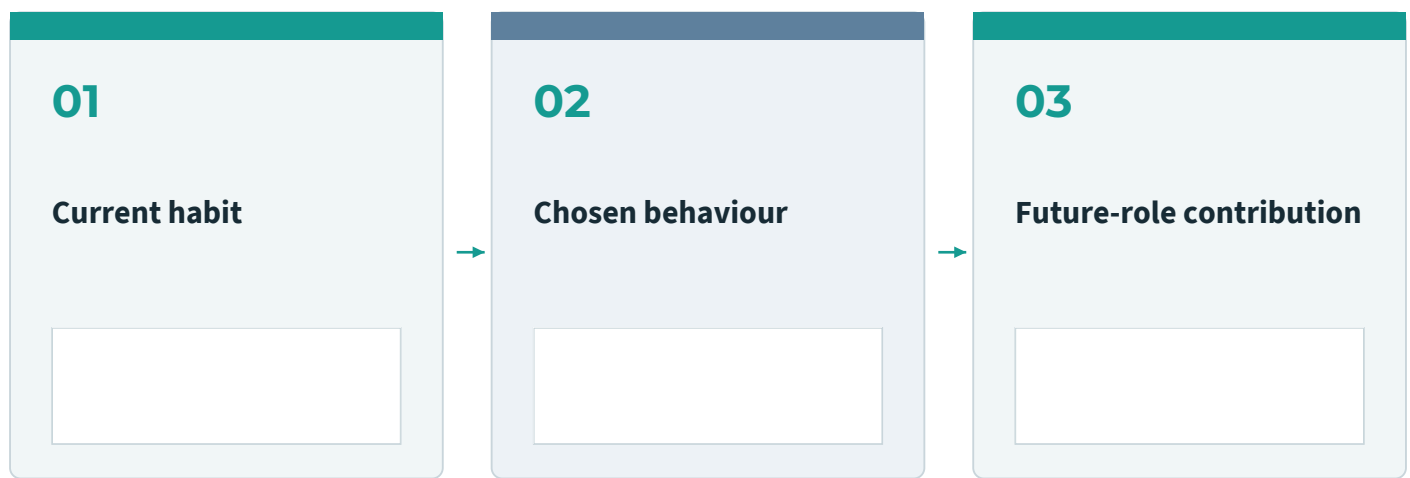
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Example

LIVE WORKSHEET

LEADERSHIP IDENTITY IN ACTION



NOW

NEXT USEFUL SIGNAL

FUTURE

Make the story observable and workable, not an idealised promise.

01 Desired description

02 Observable practices

03 Existing evidence

04 Habit in tension

05 Small action

06 Review

Basis: H01 / H04 / R21 | Original executive application

X54 Future leadership identity in practice

ACTIVITY

Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.

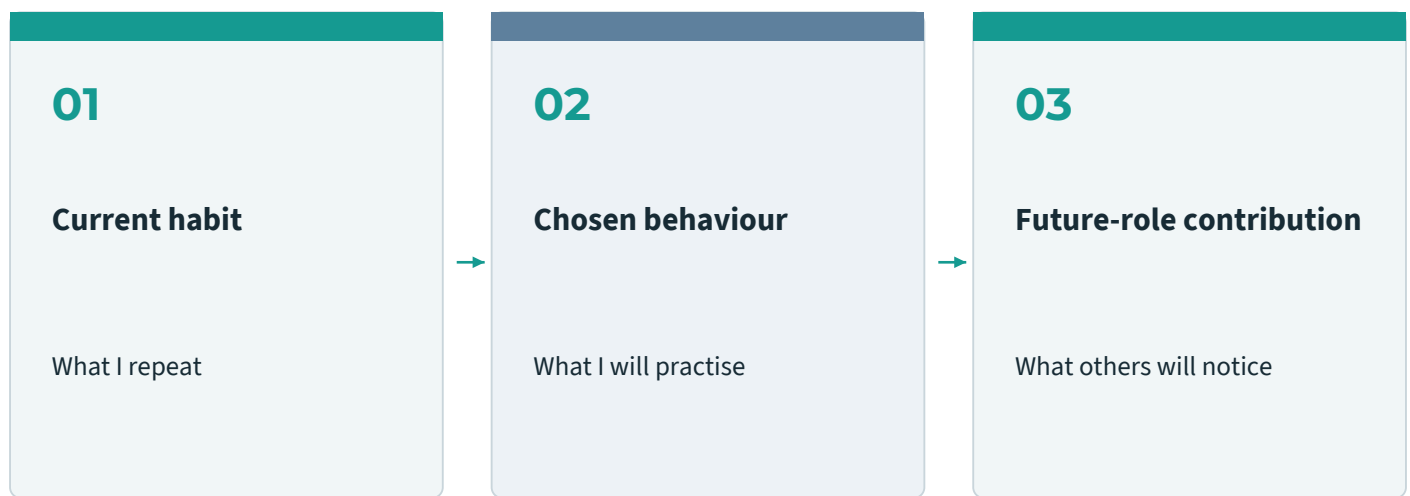
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Example

FICTIONAL WORKED EXAMPLE

LEADERSHIP IDENTITY IN ACTION



NOW

NEXT USEFUL SIGNAL

FUTURE

Make the story observable and workable, not an idealised promise.

01 Desired description

A project director who integrates evidence and helps others own good decisions.

03 Existing evidence

M-07 used this approach successfully in a recent cross-functional handover.

05 Small action

At the next checkpoint, ask for the specialist's recommendation and evidence before offering a view.

02 Observable practices

Ask for options first, make the trade-off explicit and close with an accountable owner.

04 Habit in tension

Under deadline pressure, M-07 rewrites the recommendation before hearing the specialist's reasoning.

06 Review

Check whether ownership and decision quality improved, rather than whether M-07 felt like a different person.

Basis: H01 / H04 / R21 | Original executive application

COMPLETE SESSION DESIGNS

From individual tools to a session.

The full run sheets and annotated dialogues follow. Use them as adaptable plans, not mandatory scripts.

S03

Strategic decision coaching

60 minutes

Run sheet 132 / Annotated dialogue 133

S05

Difficult conversation session

60 minutes

Run sheet 134 / Annotated dialogue 135

S06

Pressure, assumptions and restart session

60 minutes

Run sheet 136 / Annotated dialogue 137

Prepare from the linked tools

Begin with the session purpose, the agreed boundaries and the relevant activity guides. The source run sheet identifies the suggested tool route. Check whether the coachee needs that sequence now, then adapt the pace and emphasis within the agreement.

Use dialogue as a learning example

The annotated conversations are fictional. Read what the coach is doing and why, rather than copying a phrase mechanically. Keep work evidence, interpretation, agency and decision authority visible. Select one useful follow-through assignment and agree how it will be reviewed.

THE FULL SESSION LIBRARY

S01 is in Agree; S02 in Assess; S03, S05 and S06 in Activate; S04 in Apply; S07 in Align; S08 in Assure. The Suite page links to all six guides.



Strategic decision coaching

Improve reasoning about a consequential decision while leaving decision authority with the executive and the appropriate governance system.

Time	Focus	Coach action
0-8	Frame the decision	State the question, authority, deadline and mandatory constraints.
8-20	Examine the evidence	Separate observations, assumptions and unknowns.
20-35	Expand alternatives	Consider options through immediate, system and longer-term lenses.
35-45	Compare and challenge	Use explicit criteria and test one disputed assumption or failure route.
45-55	Choose the next move	Decide, seek evidence or route the issue to the right owner.
55-60	Record the reasoning	Capture conditions, uncertainty and a prospective review date.

BETWEEN-SESSION ASSIGNMENT

Complete X35 or X65, not both unless useful. Obtain the missing evidence and record the decision before the outcome is known.

PREPARATION & LIMIT

Tool route: X21, X27, X35-X38, X65. The coach does not authorise technical, legal, investment or safety decisions. Use qualified advice where the decision requires it.



Strategic decision coaching

Improve reasoning about a consequential decision while leaving decision authority with the executive and the appropriate governance system.

Speaker / coaching purpose	Illustrative dialogue
Coach / Prevents scope drift.	What decision is yours to make today?
M-07 / Defines the executive's recommendation role.	Recommend whether we can pass the gate with one supplier confirmation outstanding.
Coach / Separates gates from weighted preferences.	What requirement is not negotiable?
M-07 / Establishes a constraint, not a coaching judgement.	Technical assurance must be complete. That part is signed off.
Coach / Generates alternatives.	What are the feasible options for the remaining uncertainty?
M-07 / Creates a comparison.	Delay, approve everything or approve a bounded step with a condition.
Coach / Invites disconfirming evidence.	What could make the bounded option unwise, and who can verify it?
M-07 / Identifies further evidence.	If downstream commitments cannot be stopped. I need the delivery lead to confirm that.
Coach / Builds prospective learning.	Record that before deciding, and keep the prediction for our review.

DEBRIEF AND NEXT DECISION

Review process and outcome separately. Ask what was reasonable at the time, what was lucky or unlucky, and which reasoning practice should change.



Difficult conversation session

Prepare a clear, respectful conversation and rehearse listening, challenge and a practical ending.

Time	Focus	Coach action
0-10	Purpose and boundaries	Clarify the issue, authority, desired outcome and whether a formal process applies.
10-20	Facts and interests	Separate observed events from inferred motives; consider the other role's legitimate interests.
20-35	First rehearsal	Practise a short opening and a plausible response, then pause for feedback.
35-45	Second rehearsal	Practise listening, summarising and maintaining a legitimate boundary.
45-55	Plan the real conversation	Choose timing, setting, support and a follow-up route.
55-60	Close	Record one key phrase and the evidence to review afterwards.

BETWEEN-SESSION ASSIGNMENT

Use X46 or X49 to prepare, then X67 after the conversation. Seek specialist advice first if the issue is legally sensitive or part of a formal employment process.

PREPARATION & LIMIT

Tool route: X27, X46-X49, X51, X67. This design is not mediation, legal advice or a disciplinary script. Do not use it to manipulate, threaten or bypass required procedures.

Difficult conversation session

Prepare a clear, respectful conversation and rehearse listening, challenge and a practical ending.

Speaker / coaching purpose	Illustrative dialogue
Coach / Defines a usable outcome.	What do you need to be clear by the end?
M-07 / Keeps the work central.	How we will handle late cost evidence before the gate.
Coach / Removes accusation.	Try the opening without explaining the peer's intention.
M-07 / Uses observable facts and inquiry.	The last two updates arrived after the preparation deadline. What is getting in the way?
Coach, as peer / Introduces a plausible perspective.	Your deadline ignores when the supplier gives us information.
M-07 / Demonstrates listening before solution.	So the dependency makes the current deadline unreliable. Which earlier provisional view could we provide?
Coach / Retains accountability.	What boundary still needs to be clear?
M-07 / States a legitimate limit.	We cannot present an unverified assumption as settled.
Coach / Avoids a vague agreement.	Close with who will do what and what still needs approval.

DEBRIEF AND NEXT DECISION

Ask what happened, what the other person needed and what remains unresolved. Success is not simply getting agreement or reducing discomfort.



Pressure, assumptions and restart session

Explore a pressure-triggered work response and design a proportionate alternative without clinical interpretation.

Time	Focus	Coach action
0-10	Check the remit	Ask what is happening, whether coaching is appropriate and what support is needed.
10-25	Reconstruct one episode	Separate event, interpretation, response and work consequence.
25-35	Find resources and alternatives	Use a counterexample, fair self-talk or a perspective question with permission.
35-48	Practise a small response	Rehearse a cue and an alternative question or action.
48-55	Plan conditions	Identify workload, authority and support changes that are needed.
55-60	Close and review	Agree a modest test or a different support route.

BETWEEN-SESSION ASSIGNMENT

Choose X39, X40 or X68 according to fit, not as a battery. Practise one response and record the context. Significant distress or needs outside competence require appropriate qualified support.

PREPARATION & LIMIT

Tool route: X17, X28, X39-X42, X60, X68. No mental-health diagnosis, treatment or promise of symptom reduction. Use referral and escalation protocols when indicated.



Pressure, assumptions and restart session

Explore a pressure-triggered work response and design a proportionate alternative without clinical interpretation.

Speaker / coaching purpose	Illustrative dialogue
Coach / Checks fit and choice.	Would it be useful to examine one work episode, or do you need a different kind of support today?
M-07 / Defines behaviour.	A work episode is useful. Under pressure I give the answer before people finish.
Coach / Finds the cue.	What happened immediately before that?
M-07 / Separates an assumption.	The sponsor asked for certainty and I assumed I had to provide it.
Coach / Invites a balanced alternative.	What would a responsible answer look like if uncertainty remained?
M-07 / Practical response.	State what we know, what we do not know and who can resolve it.
Coach / Avoids person-only formulation.	What in the system would make that answer acceptable?
M-07 / Names a support action.	The sponsor must accept a conditional decision where governance permits it.
Coach / Connects agency and conditions.	Let us keep both the personal practice and the sponsor clarification in the plan.

DEBRIEF AND NEXT DECISION

Review whether the alternative improved the work and whether the necessary conditions were present. Do not equate feeling calmer with a better decision.

SHARED FOUNDATIONS AND REFERENCES

Keep the surrounding practice intact.

These source pages accompany every guide so that the activity work is not separated from its context and limits.

Original introduction and use guidance

The following pages retain the master introduction and its instructions on selecting tools, preserving source distinctions and applying professional judgement. They describe the complete toolkit; this standalone guide contains the relevant stage plus the shared material.

Information and practice boundaries

Retained pages cover the companion workbook, private records, the fictional teaching case, other forms of help, and when to pause, refer or re-contract. Read them alongside the active relationship agreement rather than assuming a worksheet establishes permission.

Source continuity

The ebook crosswalk identifies where the source handbook contributes to the toolkit. The references retain the original source codes and study descriptions. They are copied from the master, not presented as newly researched or independently revalidated for this split edition.

Language and edition notes

The working glossary and original responsible-use page remain available in each volume. The original master page numbers, tool identifiers and source descriptions are retained. New guide pagination and the suite page map make the content usable in the smaller volumes.

SOURCE PAGES IN THIS SECTION

Master p.4; pp.20-26; pp.591-606. Source p.2 (the model) and p.3 (operating levels) are already at the front of this guide.



INTRODUCTION

Executive coaching that travels into work

A toolkit for real executive work

This manual is for professional coaches, internal coaching leads and executives who want development to become useful action. It combines HR Delivery's published 6A system, the supplied Coaching and Mentoring at Work ebook and the original 88-tool coaching suite with 72 new executive activities. The source tools retain T01-T88; the new activities use X01-X72. The IDs do not replace the ebook's separate resource IDs. [H01-H04]

Start with a question, not a battery

An executive may need to clarify a mandate, make a difficult decision, delegate without taking work back, hear feedback or navigate a transition. Begin with that question and the conditions around it. Use one activity because it helps, not because it is next in the book. Coaching is not a substitute for management action, instruction, formal employment procedures or qualified health support.

Two connected kinds of tool

The T library provides the organisational and professional infrastructure as well as conversation and transfer tools. The X library provides detailed coach-coachee activities, private reflection, rehearsal and between-session work. Together they connect a trustworthy service with the actual experience of learning. Each A has its own directory and a route through the most relevant tools.

From guide to work

Read the practical guide, prepare the required evidence, agree the activity and use the working form. The worked pages show source examples or clearly labelled new fictional applications. They are not client findings or benchmarks. After an activity, identify what the coachee learned, what they chose and what the next real work opportunity will test.

Use professional judgement

This toolkit is educational and practical. It does not confer accreditation, technical authority or test-user qualification. Original reflective questions are not validated psychometric instruments. Third-party models retain their attribution; separately licensed products and protected assessment item banks are not reproduced. Source limitations and editorial choices are made visible.

Choose. Prepare. Coach. Apply.

1 / Choose the smallest useful tool

Use the front index, each A directory or the assessment-to-activity routes. Agree why an activity fits today's question. The six A stages are an operating system with feedback loops, not a rule that every session must visit all six.

2 / Prepare and contract

Read the purpose, timing, inputs and limits. Ask permission for the activity, explain what will be recorded and clarify who may see it. A person may decline a method, retain private reflections or choose a plain-language alternative.

3 / Guide without taking over

Use the numbered method and suggested questions as prompts. Do not read them mechanically or force a preferred conclusion. Ask the coachee to complete their own record wherever possible and distinguish observation from interpretation.

4 / Use a form suited to the work

Canvases hold a bounded question; registers hold repeated entries; rubrics require their anchors; calculators require valid inputs. The manual and workbook name the same tool IDs and tabs. Blank workbook inputs are deliberate, not missing examples.

5 / Debrief and transfer

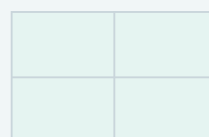
Ask what was useful, what did not fit and what the coachee chooses next. An activity should normally lead to a work experiment, a better question or an appropriate organisational action. No action is also legitimate when evidence or authority is missing.

6 / Review and close

Keep the original prediction or goal anchor. Review action, result and explanation separately. Decide what to retain, adapt or stop. Record permitted summaries separately from private learning. One completed page is not evidence of a lasting change.

CHOOSE THE VISUAL WORKING SURFACE


WHEEL

LIFELINE

PLOTTER

CHARTS

On paper, write and plot directly. In a PDF reader, use the labelled text fields for notes and the pen or drawing tool for graphical marks. These PDF diagrams do not recalculate automatically.

For live charts, open 12 Visual Index in the Excel workbook. V01-V07 connect the wheel, lifeline, priority plot, time review, decision matrix, feedback counts and goal anchors to their manual activities.

Source continuity and transparent adaptations

What is preserved

The six A names, operating levels, enablers, quality lens and T01-T88 IDs come from HR Delivery's coaching framework and source toolkit. The ebook's coaching and mentoring distinction, examples and assessment cautions are retained. MENTOR, BRIDGE and RELATE remain mentoring architectures; they are not renamed as executive coaching stages. [H01-H04]

What is new

X01-X72, the assessment-to-activity recommendations, session designs and new executive episodes are original educational applications for this edition. Research sources inform selected methods; that does not establish validation of these worksheets or the combined toolkit. Timings are planning estimates, not an optimal dose supported by a universal formula.

Four-way contracting clarification

H02 and the ebook identify coachee, coach, sponsor and programme owner. H04 T13's opening instruction instead names the line manager. This edition uses the controlling four parties and records line-manager support explicitly, including when roles are combined. The discrepancy is disclosed rather than silently merged.

Experience pulse clarification

T62 retains the source's eight actual statements. Stable IDs and single-choice response fields are added. Its five-label source example is replaced by an original eight-item fictional example. The result is descriptive experience feedback, not an alliance diagnosis or composite psychometric scale.

Maturity convention selected

T74 uses H04 Appendix M: Ad hoc, Defined, Integrated and Adaptive. H03 uses Ad hoc, Managed, Integrated and Strategic, with a different 80% progression rule. Those conventions are not combined. This edition records each of the sixteen dimensions against the Appendix M anchors and makes no overall maturity score.

Source cases remain separate

Meridian Infrastructure Group is the fictional case in H04. New X examples extend the M-07 executive situation and are labelled accordingly. Madar Facilities and Harbour Skills Partnership are the ebook's separate fictional cases. Their evidence is not merged or presented as actual client work.

Use evidence without overstating it

Research informs; it does not guarantee

Research syntheses support examining coaching as a potentially useful developmental intervention, with results dependent on design, measures and context. They do not establish that every exercise in a toolkit works, that more sessions are always better or that one conversation model is universally superior. [R06-R08]

Mechanism and application are different claims

Goal setting, implementation intentions, self-determination and self-distancing offer ideas for practice. An executive worksheet adapting those ideas is not itself a validated intervention. The source register distinguishes research, professional guidance, creator methods and licensed-resource pointers. [R17-R26]

Use more than one kind of evidence

Combine the coachee's account, work episodes, authorised assessment where useful, stakeholder experience and operational context. Each source has limits. Keep preference, judgement, behaviour and reasoning separate. A catalogue is not a technical manual. [H01, H05, R04-R05]

Protect against a persuasive success story

Retain failed predictions, missing observations and adverse effects. Ask what else changed and whether the practice was actually used. Do not infer coaching impact from attendance or satisfaction alone. A credible contribution statement may be modest and still useful. [H01-H04]

Do not score what the tool cannot support

The new activities do not rank executives or create psychological diagnoses. Locally defined scales need their anchors and context. The workbook intentionally avoids an overall coachee score, a combined assessment verdict and an automatic readiness decision.



One workbook. Clear information boundaries.

One engagement per working copy

The consolidated workbook is a convenience, not an access-control system. Use one engagement per copy. A hidden sheet, password on a worksheet or a colour label does not make private content safe to share. Store records in an approved environment with the required access controls.

Share selected records, not the whole file

The coach may use governance tabs privately and give the coachee selected X activity pages. A sponsor receives only the agreed summary or evidence, not the full workbook, raw assessment reports or private reflection. Check exports for identifying notes and hidden data.

Keep different purposes separate

Programme assurance should use the minimum appropriate aggregate or de-identified information. Formal assessment, selection, performance management and health support require their own purposes, evidence and permissions. Do not repurpose coaching records silently.

Technology and AI need a fresh check

Do not record, transcribe or upload session material to an AI service by default. Establish purpose, consent where appropriate, processing arrangements, retention, access, cross-border considerations and human responsibility before use. Verify applicable requirements with qualified owners. [H01, H04, R01]

Save a clean master

Keep an untouched workbook and make a working copy. Follow the start and setup instructions, use the exact tool index and retain important baseline versions. Formula cells are labelled; entered text and numeric values must still be reviewed by a competent practitioner.



Meridian: one fictional executive journey

The source case

H04 uses the fictional Meridian Infrastructure Group, including executive M-07 and MetroLink East, to illustrate strategic coaching and workplace transfer. These are teaching examples, not HR Delivery client findings. Source worked extracts retain that status. The new X activities use additional fictional episodes around the same executive role.

The recurring executive question

M-07 wants to lead cross-functional gate decisions more effectively without repeatedly taking back specialists' work. The role requires decision framing, constructive challenge, integration and clear ownership. It does not remove technical sign-off from specialists or material scope authority from the sponsor.

The initial hypothesis

Late evidence creates uncertainty. M-07 responds by supplying answers or rewriting recommendations, which may reduce others' ownership and reinforce waiting. This is a hypothesis, not a personality diagnosis. Supplier dependencies, unclear authority and workload are plausible alternative or additional explanations.

The practical experiments

M-07 tests a concerns-first meeting opening, clearer delegation checkpoints and an earlier decision brief. The examples show useful changes and continuing barriers. A supplier delay does not disappear merely because a leadership conversation improves.

A separate lesson from the ebook

Madar Facilities shows why a coaching pilot may need to change course after operational barriers become clearer. Its lesson is not that all difficulties are coaching problems. Keep the behaviour, result and explanation separate and assign system actions to the proper owner. Harbour's mentoring case remains a distinct example of knowledge transfer and career agency. [H01, pp.72-84]



Coaching and other forms of help

Coaching

An agreed developmental partnership using reflection, inquiry, challenge and practice. The coach may offer an observation or relevant information with permission, while preserving the coachee's ownership of choices. It is not simply never giving advice. [H01]

Mentoring

Relevant experience, advice, challenge and connections support development without taking ownership of the mentee's future. HR Delivery's MENTOR, BRIDGE and RELATE architectures remain distinct from the six A coaching journey. The executive toolkit does not silently replace the mentoring suite. [H01-H02]

Management and instruction

Managers retain responsibility for decisions, resources, standards and performance conversations. Missing knowledge may require instruction or supervised practice. Calling an instruction a coaching question can obscure power and responsibility.

Qualified specialist support

Clinical, legal, technical, safeguarding and other consequential needs require the appropriate qualified route. Pause ordinary coaching where necessary. A referral is a professional boundary decision, not a negative judgement about the coachee.

Team and system work

An individual's coaching contract does not authorise team assessment, organisational diagnosis or intervention in colleagues' private information. Use separate purposes, consent, competence and governance for team coaching, facilitation and system change.



When to pause, refer or re-contract

Immediate risk

Stop the routine activity. Where there is an immediate or likely serious danger, follow the locally verified emergency or safeguarding protocol and obtain appropriate qualified help. Stay within your role, use minimum necessary disclosure and do not delay action to complete a worksheet. [H01, H04]

Significant distress or a need outside competence

Acknowledge what the person has shared without diagnosing. Explain the boundary, discuss appropriate support and consult according to the agreed protocol. Coaching may pause or continue only where the scope and qualified advice make that appropriate.

A formal employment concern

Do not convert an allegation, grievance, discrimination concern or disciplinary issue into an informal coaching exercise. Explain the available formal route and any role conflict. Coaching may support the person, but it must not become a hidden investigation.

A changed purpose or sponsor

Review the agreement when a promotion assessment, performance process, new manager or new sponsor changes the use of information. Do not rely on the original consent for a materially different purpose.

A technology or privacy change

Pause a new recording, transcription, AI or data-sharing use until the purpose and safeguards have been reviewed. Neither convenience nor an employer subscription establishes permission to upload private coaching content.

A relationship that is not useful

Invite feedback, repair where appropriate and offer the agreed rematch or exit route. Do not diagnose the coachee as resistant because the match or method does not fit.



The ebook and this toolkit

Page references below refer to the supplied 131-page D6 ebook, not this manual.

Ebook area	Pages	Source contribution	Toolkit application
Framework	6-8	6A, three levels, six enablers and quality lens	Model opening; all six A sections
Defining and selecting help	9-18	Coaching, mentoring, management and specialist boundaries	T03, X08; help and pause routes
Contracting	19-23	Trustworthy agreement and sponsor boundaries	T13-T24, X09-X14
Listening and reflection	25-28	Inquiry, meaning and checked interpretation	T37-T43, X14, X27
Goals and action	29-33	Observable goals, evidence and small practice	T31-T33, X55-X61
Feedback and challenge	34-38	Behaviour, perspective and agency	X22-X24, X46-X50
Mentoring	40-45	Experience and advice without imposing a career	Kept distinct; not renamed as coaching
Ethics and difficult situations	46-50	Competence, conflicts, referral and repair	T20-T24, T69-T72, X11, X52
Programme design	51-57	Access, matching, governance and capacity	T01-T12, T75-T84
Practitioner development	58-62	Observed practice and support	T68, T77, T79-T80
Evaluation and closure	63-71	Contribution, independence and endings	T61-T74, X69-X72

The mappings are editorial navigation aids. The ebook is not the complete 88-tool suite, and its C-resource IDs do not replace T01-T88. Where an internal ebook reference differs from an actual resource heading, use the heading and page range shown here. New activities remain X01-X72.



The ebook and this toolkit

Page references below refer to the supplied 131-page D6 ebook, not this manual.

Ebook area	Pages	Source contribution	Toolkit application
Madar Facilities case	72-79	A fictional coaching pilot reveals operational barriers	Separate case lesson; not merged with Meridian
Harbour mentoring case	80-84	Knowledge transfer and career agency	Mentoring distinction retained
Assessment companion	85-88	Preference, judgement, behaviour and technical limits	46-offering selector; X23-X24
Practitioner learning pathway	89-91	A learning route, not a qualification	Session designs and supervised practice guidance
Worked and reusable resources	92-122	Separate ebook resource IDs and records	Linked conceptually, not renumbered as T tools
C03 resource heading	99-101	Goal, baseline and workplace experiment	T31-T33, T51, X55; use actual heading/pages
Framework connections	125-126	Coaching sits within wider HR and OD work	System actions retained alongside coaching
Sources and responsible use	127-131	Evidence, permissions and publication limits	Source register and edition notes

The mappings are editorial navigation aids. The ebook is not the complete 88-tool suite, and its C-resource IDs do not replace T01-T88. Where an internal ebook reference differs from an actual resource heading, use the heading and page range shown here. New activities remain X01-X72.



Sources and practice notes

What the framework preserves, what the research informs and what remains an educational adaptation.

Use the method. Keep the evidence. Protect the relationship.



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- H01** **HR Delivery (2026). Coaching and Mentoring at Work. D6 editorial edition.**
Source publication
Supplied 131-page ebook. Governs distinctions, relationship practice, cases and assessment cautions.
Supplied: D6_Coaching_and_Mentoring.pdf
- H02** **HR Delivery (2026). 6A Workplace Coaching System: One-page Framework, second edition.**
Source framework
Controlling six stages, three levels, six enablers and four-part quality lens.
HR_Delivery_Workplace_Coaching_One_Page_Framework.pdf
- H03** **HR Delivery (2026). Workplace Coaching White Paper, second edition.**
Source publication
Organisational rationale, evidence and operating architecture. Maturity labels differ from H04 Appendix M; see edition crosswalk.
HR_Delivery_Workplace_Coaching_White_Paper.pdf
- H04** **HR Delivery (2026). Workplace Coaching Extensive Toolkit, second edition.**
Source toolkit
88 original tool IDs and titles retained. Operational templates re-presented; selected conflicts are disclosed and resolved against the controlling framework.
HR_Delivery_Workplace_Coaching_Extensive_Toolkit.pdf



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

H05 HR Delivery. Assessment catalogue.

Catalogue / checked 12 October 2026

Live catalogue reviewed for names and intended applications. A catalogue is not technical validation or a licence to reconstruct a test.

<https://hr.delivery/hr-delivery/assessments>

R01 International Coaching Federation. Code of Ethics (effective 1 April 2025).

Professional standard

Ethical relationship, responsibilities, agreements, confidentiality, conflicts and accountable practice.

<https://coachingfederation.org/credentialing/coaching-ethics/icf-code-of-ethics/>

R02 International Coaching Federation. 2025 Core Competencies.

Professional standard

Competence reference, not a qualification granted by this toolkit.

<https://coachingfederation.org/wp-content/uploads/2025/09/icf-cs-core-competencies-2025.pdf>

R03 Global Code of Ethics. Fourth version, December 2025.

Professional standard

Public code and version reference. Apply the professional code governing your actual practice.

<https://globalcodeofethics.org/>



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R04** **International Test Commission. International Guidelines for Test Use.**
Testing guidance
Competent, appropriate and ethical test use, with evidence relevant to intended purpose.
<https://www.intestcom.org/page/15>
- R05** **International Test Commission. Guidelines for Translating and Adapting Tests, second edition.**
Testing guidance
Translation alone does not establish equivalent measurement or valid interpretation.
https://www.intestcom.org/files/guideline_test_adaptation_2ed.pdf
- R06** **Nicolau, Candel, Constantin and Kleingeld (2023). The effects of executive coaching on behaviors, attitudes, and personal characteristics: a meta-analysis of randomized control trial studies.**
Research synthesis
Average effects across interventions do not validate each exercise or guarantee individual outcomes.
<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1089797/full>
- R07** **Workplace coaching: a meta-analysis and recommendations for advancing the science of coaching (2023). Frontiers in Psychology, article 1204166.**
Research synthesis
Evidence for workplace coaching should be interpreted with design, measures and heterogeneity in view.
<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1204166/full>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R08** **Grant, Curtayne and Burton (2009). Executive coaching enhances goal attainment, resilience and workplace well-being: a randomised controlled study.**
Primary coaching study
A specific multicomponent executive intervention; its results cannot be assigned to a standalone worksheet.
<https://doi.org/10.1080/17439760902992456>
- R09** **The Open University. Workplace learning: coaching and mentoring, section 5.2.**
Educational method
GROW as a conversation scaffold, not a substitute for contracting or responsive listening.
<https://www.open.edu/openlearn/money-business/workplace-learning-coaching-and-mentoring/content-section-5.2>
- R10** **McKergow and Jackson. The OSKAR coaching framework.**
Creator method
Outcome, Scaling, Know-how and resources, Affirm and Action, Review. This toolkit uses original executive prompts.
<https://sfwork.com/oskar-coaching>
- R11** **Motivational Interviewing Network of Trainers. Understanding motivational interviewing.**
Professional method
Collaborative exploration of ambivalence and autonomy; no claim of MI certification or treatment competence.
<https://motivationalinterviewing.org/node/11216>



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R12** **Center for Creative Leadership. Situation-Behavior-Impact feedback model.**
Creator/practitioner method
Describe the situation, observed behaviour and impact, then inquire rather than assume intent.
<https://www.ccl.org/articles/leading-effectively-article/sbi-feedback-model-a-quick-win-to-improve-talent-conversations-development/>
- R13** **Marshall Goldsmith. Try Feedforward Instead of Feedback.**
Creator/practitioner method
Future-oriented suggestions are used with permission; this toolkit supplies an independent workplace application.
<https://www.marshallgoldsmith.com/post/try-feedforward-instead-of-feedback>
- R14** **Kegan and Lahey (2001). The Real Reason People Won't Change.**
Creator publication
Competing commitments and assumptions as a reflective hypothesis, not a diagnosis or reason to force disclosure.
<https://store.hbr.org/product/the-real-reason-people-won-t-change/R0110E>
- R15** **Harvard Program on Negotiation. Difficult conversations resource.**
Professional education
Separate observed impact from assumed intention; explore interests and contribution without excusing misconduct.
<https://www.pon.harvard.edu/wp-content/uploads/images/posts/dbcr29.pdf>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R16 **Neff. Exploring self-compassion through writing.**

Creator practice

Inspires a brief, optional, work-focused reflective activity. The original exercise is not reproduced.

<https://self-compassion.org/exercises/exercise-3-exploring-self-compassion-through-writing/>

R17 **Locke and Latham (2002). Building a practically useful theory of goal setting and task motivation.**

Research synthesis

Specific goals, feedback and task complexity require judgement; performance targets are not always the best learning goals.

<https://doi.org/10.1037/0003-066X.57.9.705>

R18 **Gollwitzer and Sheeran (2006). Implementation intentions and goal achievement.**

Research synthesis

If-then plans connect a recognisable cue with a chosen action. Executive adaptation here is not separately validated.

[https://doi.org/10.1016/S0065-2601\(06\)38002-1](https://doi.org/10.1016/S0065-2601(06)38002-1)

R19 **WOOP: Wish, Outcome, Obstacle, Plan.**

Creator method

Creator guidance for mental contrasting with implementation intentions; use a feasible, ethical work wish.

<https://woopmylife.org/>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R20**
Mental contrasting with implementation intentions: meta-analysis (2021).

Research synthesis

General goal-attainment evidence does not establish a fixed benefit for executives or any specific organisational outcome.

<https://pmc.ncbi.nlm.nih.gov/articles/PMC8149892/>
- R21**
Ryan and Deci (2000). Self-determination theory and the facilitation of intrinsic motivation, social development and well-being.

Foundational research

Autonomy, competence and relatedness inform questions about conditions, not a new diagnostic score.

https://selfdeterminationtheory.org/SDT/documents/2000_RyanDeci_SDT.pdf
- R22**
University of Michigan, Center for Positive Organizations. Reflected Best Self Exercise.

Licensed resource pointer

A separately licensed product. Our best-work episode review is an original activity, not a reproduction of the licensed exercise.

<https://positiveorgs.bus.umich.edu/cpo-tool/reflected-best-self-exercise/>
- R23**
University of Michigan, Center for Positive Organizations. Job Crafting Exercise.

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A separately licensed resource. Our role-crafting proposal is an independent work-design discussion, not its booklet or scoring.

<https://positiveorgs.bus.umich.edu/cpo-tool/job-crafting-exercise/>



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R24** **Kross et al. (2014). Self-talk as a regulatory mechanism: how you do it matters.**
Primary experimental research
Experimental self-distancing evidence; our short executive reflection is an adaptation, not clinical treatment.
<https://pubmed.ncbi.nlm.nih.gov/24467424/>
- R25** **Lally et al. (2010). How are habits formed: modelling habit formation in the real world.**
Primary research
Habit formation varies. Do not promise that a behaviour will become automatic in 21 or 66 days.
<https://doi.org/10.1002/ejsp.674>
- R26** **Turner-Stokes (2009). Goal attainment scaling in rehabilitation: a practical guide.**
Method with transfer limitations
The toolkit borrows explicit individual anchors. It does not import clinical norms, T-scores or validation into executive coaching.
<https://www.kcl.ac.uk/nmpc/assets/rehab/6.-goal-attainment-scaling-a-practical-guide.pdf>

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Agency	The coachee's meaningful ownership of choices within real constraints.
Alliance	Agreement on purpose and work, with a relationship that supports useful learning; not a score invented by this toolkit.
Assessment	A defined method of gathering evidence, whose intended use and technical basis matter.
Baseline	The starting evidence, with a defined behaviour, period, context and source.
Boundary	A limit of purpose, role, authority, competence, information or method.
Capability	What a person can demonstrate under relevant conditions, not merely a preference or confidence rating.
Capacity	The actual time, resources and support available to do the work.
Coachee	The person receiving coaching; their agency and information rights remain central.

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Coaching	A purposeful developmental partnership supporting reflection, choice, practice and learning.
Confidentiality	Agreed protection of information with explicit applicable limits, not absolute secrecy.
Contribution	A reasoned account of how coaching may have helped alongside other influences.
Counterexample	Evidence that qualifies or challenges a proposed pattern or interpretation.
Experiment	A small, ethical attempt to test a practice and learn from the result.
Four-way contract	Agreement covering coachee, coach, sponsor and programme owner, with other support roles explicit.
Goal anchor	A predefined description of a level of attainment for one specific goal.
Hypothesis	A provisional explanation or prediction open to testing and revision.

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Impact	A consequence experienced in work; not established by attendance or satisfaction alone.
Interpretation	Meaning assigned to evidence, distinguishable from the evidence itself.
Mentoring	Development through relevant experience, advice, challenge and connections while respecting the mentee's direction.
Programme owner	The role accountable for the coaching service's design, operations and governance.
Re-contracting	Reviewing and revising an agreement when purpose, roles, risks or conditions change.
Referral	Connecting a need to an appropriate qualified route beyond the coach's remit.
Sponsor	The commissioning or supporting role; funding does not confer ownership of private session content.
Supervision	Reflective and ethical professional support for the coach's practice and judgement.



Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Transfer	Use and adaptation of learning in actual work.
Validation	Evidence supporting a specified interpretation and use, not a property established by a polished report.



EDITION AND RESPONSIBLE USE

Executive Coaching Framework & Toolkit

Visual Practice Edition / October 2026 / HR Delivery

Scope and source continuity

The original 606-page manual is the content and pagination master. All 160 tool identifiers are retained: T01-T88 and X01-X72. The 6A names, operating levels, enablers, quality lens, assessment companion and D6 ebook crosswalk remain intact.

Presentation revision

All 72 executive activities have redesigned working forms and matching worked examples. Fifteen core coaching tools also have redesigned forms and examples. Registers, contracts and other tools retain tabular formats when that is the useful working format.

Examples and measures

Source case examples remain fictional. Plotted positions that are not numerical source data are labelled illustrative. Wheels and personal scales are reflection aids, not validated tests, norms or predictions. No missing data are invented to make a chart look complete.

Use and professional responsibility

This is an educational and practical aid, not accreditation, clinical treatment, legal advice or technical authorisation. Use appropriate competence, consent, qualified advice and organisational processes for consequential decisions.

Source and intellectual property

Third-party model names and materials remain with their owners. Protected assessment item banks and separately licensed commercial exercise booklets are not reproduced. New visual working layouts do not alter the evidence status of a method.

Publication and privacy

The foreword remains prepared for Dr Phillip Welsh's review and approval. Keep one engagement per working copy and share only agreed outputs. Different workbook tabs are not a confidentiality boundary, and the complete workbook is not a sponsor report.

Working files and navigation

The manual has 606 pages; the coachee pack has 88. Original page references remain valid. The Excel workbook contains 183 tabs: the original 175 plus one visual index and seven additional working views. It includes seven new native charts alongside the original eight.

Access and quality boundaries

PDF text fields can be completed in a compatible reader; use its drawing tool for freehand plotting. Live numerical charts are in Excel. Cover imagery is conceptual brand artwork. Technical and visual checks are not PDF/UA certification or independent professional approval.



THE SIX-GUIDE SUITE

Six focused guides. One complete source.

All 606 pages of the Visual Practice Edition are represented across this suite. Shared foundations and references are intentionally repeated.

01

ALIGN

Charter + value hypothesis

[01_Align_Executive_Coaching_Guide.pdf](#)

140 guide pages | Core source section 27-109

02

AGREE

Four-way contract

[02_Agree_Executive_Coaching_Guide.pdf](#)

102 guide pages | Core source section 110-173

03

ASSESS

Goal + baseline + formulation

[03_Assess_Executive_Coaching_Guide.pdf](#)

154 guide pages | Core source section 174-289

04

ACTIVATE

Insight + options + commitment

[04_Activate_Executive_Coaching_Guide.pdf](#)

163 guide pages | Core source section 290-409

05

APPLY

Experiments + transfer plan

[05_Apply_Executive_Coaching_Guide.pdf](#)

115 guide pages | Core source section 410-486

06

ASSURE

Quality + value decision

[06_Assure_Executive_Coaching_Guide.pdf](#)

124 guide pages | Core source section 487-572

The ZIP includes a source-page map showing the primary guide and local page for every master page. Keep all six PDF filenames unchanged in the same folder for cross-guide links. The existing Designer Edition Excel workbook uses the same T and X tool identifiers.