



Align

Framework & toolkit

Connect executive development with a worthwhile purpose and the conditions to make it useful.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

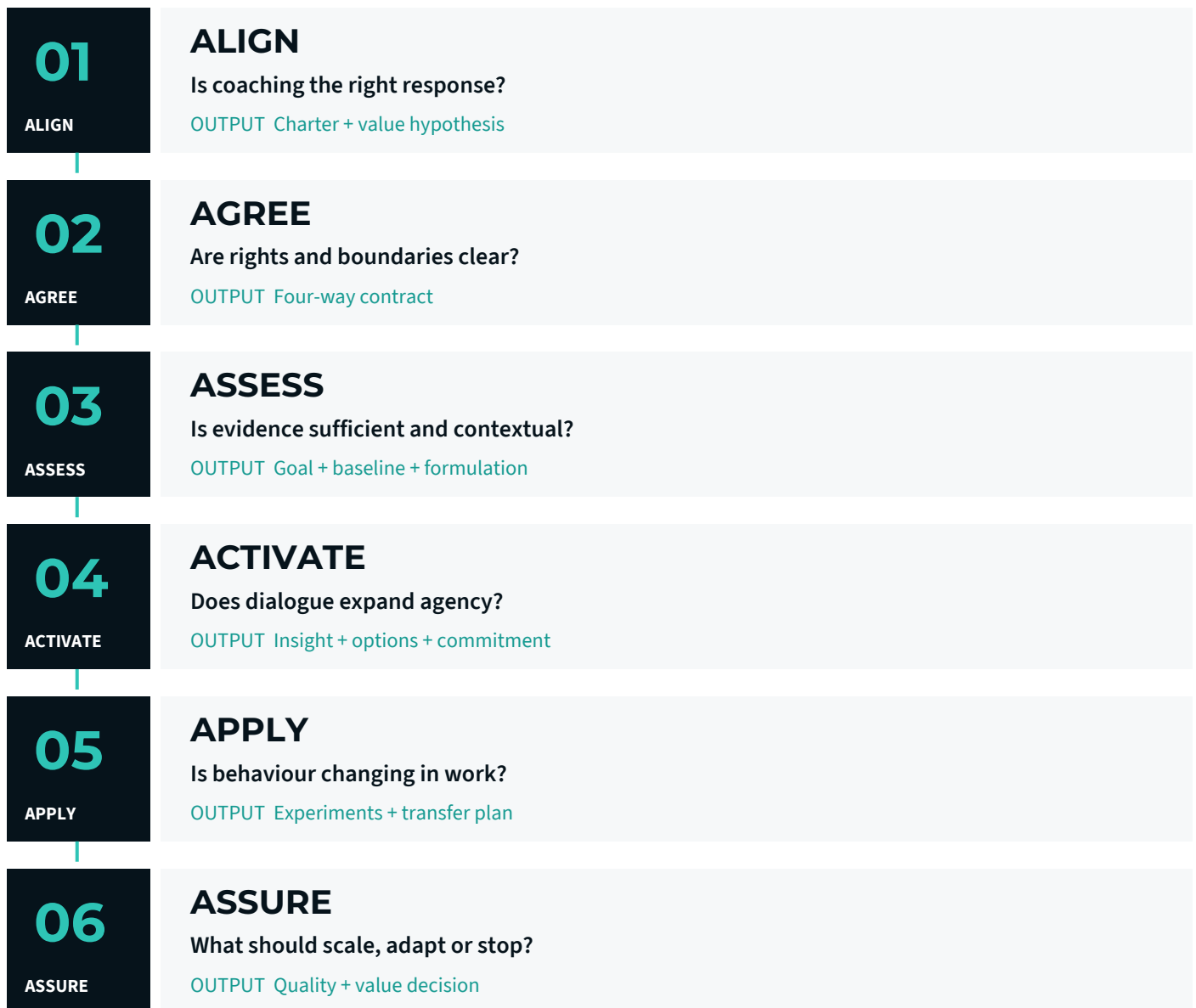
06 Assure

26 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

ALIGN / INTRODUCTION

Choose a purpose worth coaching.

What this guide is for

Align begins with the work that matters and the executive's own reason for seeking support. This guide brings together the complete Align section of the Visual Practice Edition: strategic and programme tools alongside activities for exploring mandate, contribution, values, priorities and role transition. It is a standalone volume, not a shortened version of the activities.

Start with a real situation

Bring a recent decision, conversation or handover, the sponsor's stated purpose and the executive's account of the challenge. Ask what would be different in practice. Separate a coachable behaviour from unclear authority, a resource gap or work that requires instruction, management action or specialist support. The intervention-fit tools help keep those distinctions visible.

Use the two libraries together

The T tools address commissioning, access, governance, capacity and the design of responsible provision. X01-X08 focus on the executive's role, choices and context. Select the smallest useful combination. The local tool index gives the guide, worksheet and example page for each tool; its original identifier is unchanged.

What to leave with

Develop a clear charter and a plausible value hypothesis. Name the contribution coaching may make, the assumptions that need testing and the organisational actions owned elsewhere. Do not treat a programme's approval as agreement to disclose private session material. The subsequent Agree guide establishes the relationship and its information boundaries.

Keep the whole journey in view

The six A responsibilities remain connected. The framework and enabling conditions are reproduced at the front. The six-session executive transition pathway is included after the tools. Shared practice guidance, the source register and glossary are also included, followed by the original master opening and full-library index so that the complete source is retained across the suite.

Before moving on

Use the Align gate: is coaching the right response? Record the coachee's choice, the sponsor's legitimate purpose, the support required and any condition that would justify a different intervention. Return to Align whenever the role, strategic context or purpose changes.

THE ALIGN DECISION

Is coaching the right response? Minimum output: Charter + value hypothesis.

Based on the main manual: Align practitioner brief and operating route, master pp. 30-31.

A FOREWORD PREPARED FOR DR PHILLIP WELSH

Start with the right purpose.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

A foreword for the Align guide

Begin with the work

An executive may arrive with an ambitious development objective, a sponsor's concern or simply a sense that the role has changed. Before reaching for an exercise, make room to understand that starting point. What work matters now? What is the executive being asked to contribute? What would make coaching a useful form of help?

Do not make coaching carry everything

The discipline of Align is to ask those questions without assuming that every difficulty belongs inside the person. Missing information, uncertain authority and inadequate opportunity can all shape what happens at work. A thoughtful coaching commission keeps the executive's learning and the organisation's responsibilities connected, but distinct.

Listen for an owned purpose

The tools in this guide help clarify a mandate, explore contribution and examine a transition. They also support the less visible work of designing fair access, adequate capacity and responsible governance. Use them to improve the conversation, not to replace it. A complete charter is useful only when the people involved understand its purpose and can question its assumptions.

Make the first choice carefully

My hope is that this guide helps coaches and programme owners begin with curiosity and precision. Agree what coaching may contribute, acknowledge what it cannot resolve and make the necessary support explicit. A modest, worthwhile purpose is a stronger foundation than a large promise that nobody can test. The next step is then a relationship that people can enter with clarity and confidence.

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



CONTENTS / THIS GUIDE

Find your way through Align.

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GUIDE / WORKSHEET / EXAMPLE

The original 26 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 Align gate: Is coaching the right response? 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
T01	Strategic coaching charter	015	016	017
T02	Strategy-to-behaviour chain	018	019	020
T03	Intervention fit test	021	022	023
T04	Coaching portfolio map	024	025	026
T05	Stakeholder and power map	027	028	029
T06	Business case canvas	030	031	032
T07	Eligibility and equity matrix	033	034	035
T08	Coaching mode decision matrix	036	037	038
T09	Programme theory of change	039	040	041
T10	Coaching risk register	042	043	044
T11	Governance RACI	045	046	047
T12	Programme readiness gate	048	049	050
T75	Service blueprint and participant journey	051	052	053

THE ALIGN DECISION

Is coaching the right response? Minimum output: Charter + value hypothesis.



Open the guide. Use the worksheet.

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

ID	Tool / activity	Guide	Sheet	Example
T76	Coach capability framework	054	055	056
T81	Provider RFP and due-diligence scorecard	057	058	059
T82	Implementation workplan and milestone tracker	060	061	062
T83	Communications and stakeholder plan	063	064	065
T84	Capacity, budget and demand model	066	067	068
X01	Executive role mandate	069	070	071
X02	Leadership impact compass	072	073	074
X03	Role-transition bridge	075	076	077
X04	Priority and opportunity-cost review	078	079	080
X05	Purpose, values and leadership choices	081	082	083
X06	Stakeholder value interview	084	085	086
X07	Twelve-month future story	087	088	089
X08	Is coaching the right help?	090	091	092

THE ALIGN DECISION

Is coaching the right response? Minimum output: Charter + value hypothesis.



THE 6A WORKPLACE COACHING SYSTEM

01

Align

Purpose before provision

THE GATE

Is coaching the right response?

MINIMUM OUTPUT

Charter + value hypothesis

26 TOOLS & ACTIVITIES

[Open the stage tool directory >](#)



Align: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T01	Strategic coaching charter	32	33	34
T02	Strategy-to-behaviour chain	35	36	37
T03	Intervention fit test	38	39	40
T04	Coaching portfolio map	41	42	43
T05	Stakeholder and power map	44	45	46
T06	Business case canvas	47	48	49
T07	Eligibility and equity matrix	50	51	52
T08	Coaching mode decision matrix	53	54	55
T09	Programme theory of change	56	57	58
T10	Coaching risk register	59	60	61
T11	Governance RACI	62	63	64
T12	Programme readiness gate	65	66	67
T75	Service blueprint and participant journey	68	69	70

BEFORE YOU MOVE ON

Is coaching the right response? Complete or revisit: Charter + value hypothesis.



ALIGN / TOOL DIRECTORY

Align: tools to use

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

ID	Tool / activity	Guide	Form	Example
T76	Coach capability framework	71	72	73
T81	Provider RFP and due-diligence scorecard	74	75	76
T82	Implementation workplan and milestone tracker	77	78	79
T83	Communications and stakeholder plan	80	81	82
T84	Capacity, budget and demand model	83	84	85
X01	Executive role mandate	86	87	88
X02	Leadership impact compass	89	90	91
X03	Role-transition bridge	92	93	94
X04	Priority and opportunity-cost review	95	96	97
X05	Purpose, values and leadership choices	98	99	100
X06	Stakeholder value interview	101	102	103
X07	Twelve-month future story	104	105	106
X08	Is coaching the right help?	107	108	109

BEFORE YOU MOVE ON

Is coaching the right response? Complete or revisit: Charter + value hypothesis.



ALIGN / THE PRACTITIONER BRIEF

Purpose before provision

Align connects coaching to a worthwhile organisational and personal purpose. It asks where an executive's decisions, relationships and habits can make a difference, while refusing to make coaching the answer to every problem. A lack of authority, inadequate staffing or a technical knowledge gap may require another intervention. The coachee's own reason for participating must be heard alongside the sponsor's priorities. [H01-H04]

Start with the work

Ask for the actual decisions, conversations and handovers that matter. What would colleagues experience differently? Separate the organisational outcome from the behaviour an executive can practise. A director can invite challenge and make a trade-off explicit; they cannot guarantee supplier performance or another person's response.

Test the intervention fit

Compare coaching with mentoring, instruction, management action, team facilitation and system improvement. A combined response is often more honest than a single offer. Record the part coaching may contribute and the part owned elsewhere. Do not infer a personal deficit merely because a sponsor requests coaching.

Protect access and choice

At programme level, make eligibility, matching and alternatives clear. At engagement level, check meaningful participation, time, language and access needs. A senior title does not remove a person's right to question the match or the purpose. Explain any genuinely mandatory organisational process separately.

Make the value hypothesis testable

Describe a plausible chain from coaching activity to insight, chosen behaviour, application and contribution. Name assumptions and other influences. Establish the review decision now: what would justify continuing, adapting, stopping or scaling? Avoid making financial promises before there is a defensible basis.

Keep levels distinct

Organisation leaders govern policy and investment; programme owners design access, operations and quality; coach and coachee work on the engagement. A private session cannot repair a programme's missing governance. Equally, an elaborate charter must not displace the executive's own developmental question.

Leave with two kinds of action

Agree the coachable focus and any organisational clarification needed. The sponsor might clarify decision authority while the executive prepares a role-mandate map. Both matter. Progress through the gate only when the purpose is sufficiently clear and the support is feasible.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ALIGN / OPERATING ROUTE

Choose the next useful move.

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

01

Clarify the commission

T01, T02, T03 / Charter, critical work and fit

02

Hear the executive

X01, X02, X05, X08 / Mandate, contribution and choice

03

Understand the transition

X03, X07 / New role and plausible future

04

Make room for practice

X04, T84 / Priority trade-off and capacity

05

Design responsible provision

T07, T10, T11, T12 / Access, risks, ownership and gate

GATE REVIEW

Is coaching the right response? 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

T01

TOOL

Strategic coaching charter

Define why coaching exists and the value it is expected to contribute.

Practical guide

Working form

Worked example

EXCEL TAB T01 Strategic coaching charter

TIME Two 90-minute workshops plus evidence review and approval over two to three weeks | **OWNER** Executive sponsor + programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Review strategy, risk, workforce and delivery evidence; state one priority with consequence and decision horizon.
- 02** Identify the decisions, relationships and delivery moments where that priority is won or lost.
- 03** Define the knowledge, judgement and observable behaviours required in those critical work moments.

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?

CONTINUE THE METHOD

- 04** Explain how coaching could contribute, then name alternatives and system actions it cannot replace.
- 05** Specify population, exclusions, ownership, resources, success evidence and review decision; secure accountable approval.

BOUNDARY & CAUTION

Do not use the charter as a procurement brief or individual contract before diagnosis and accountable strategic approval.

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.32



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T01

TOOL

Strategic coaching charter

Define why coaching exists and the value it is expected to contribute.

Practical guide

Working form

Worked example

EXCEL TAB T01 Strategic coaching charter

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

Strategic priority Outcome or risk the organisation must address	
Critical work Decisions, relationships or delivery moments that matter	
Capabilities Knowledge, skills and behaviours required	
Coaching contribution Mechanism through which coaching may help	
Population Who is in scope and why	
Non-goals What coaching will not be used to do	
Measures Leading, application and outcome evidence	
Decision Sponsor, funding, review and stop criteria	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T01

TOOL

Strategic coaching charter

Define why coaching exists and the value it is expected to contribute.

Practical guide

Working form

Worked example

EXCEL TAB T01 Strategic coaching charter

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Strategic priority Outcome or risk the organisation must address	Reduce avoidable capital-gate rework and restore dependable handovers across Meridian's 2027 infrastructure portfolio.
Critical work Decisions, relationships or delivery moments that matter	Project directors must frame trade-offs, invite challenge and secure timely cross-functional decisions at monthly gate reviews.
Capabilities Knowledge, skills and behaviours required	Evidence-based decision framing, constructive challenge, sponsor influence, early escalation and learning from high-stakes project reviews.
Coaching contribution Mechanism through which coaching may help	Reflection, rehearsal and live-work experiments will strengthen directors' judgement and stakeholder behaviour between formal capability inputs.
Population Who is in scope and why	Twelve project directors entering complex delivery phases, selected against transparent need, readiness and project-impact criteria.

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

T02

TOOL

Strategy-to-behaviour chain

Translate strategy into coachable behaviour and observable work evidence.

Practical guide

Working form

Worked example

EXCEL TAB T02 Strategytobehaviour chain

TIME 60-90 minutes per priority, followed by validation with people who perform the critical work | **OWNER** OD/L&D partner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Choose one strategic outcome and record the indicator or risk that makes it material.
- 02** Describe the workforce capability required, avoiding broad competency labels that cannot guide action.
- 03** Locate a recurring work moment where people must enact that capability under realistic conditions.

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

Jumping directly from strategic priority to a generic leadership competency; Defining behaviour too abstractly for observation in a real work moment; Relabelling an authority or workflow barrier as an individual motivation gap.

CONTINUE THE METHOD

- 04** Write the target behaviour so an informed observer could recognise its presence or absence.
- 05** Classify barriers as skill, motivation, opportunity or system; assign coaching and non-coaching responses accordingly.

BOUNDARY & CAUTION

Do not force a linear coaching chain where the work moment or principal barrier is still unknown.

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.35

T02 Strategy-to-behaviour chain

TOOL

Translate strategy into coachable behaviour and observable work evidence.

Guide

Worksheet

Example

LIVE WORKSHEET

Priority Strategic outcome 	→	Critical capability What the workforce must be able to do 	→	Work moment Situation where the capability is enacted
Target behaviour Observable action 	→	Barrier Skill, motivation, opportunity or system constraint 	→	Coaching mechanism How reflection and experiment could help
Evidence What would demonstrate movement 				



T02 Strategy-to-behaviour chain

TOOL

Translate strategy into coachable behaviour and observable work evidence.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Priority Strategic outcome

Improve forecast handover reliability for Meridian's highest-value capital projects during the 2027 delivery cycle.



Critical capability What the workforce must be able to do

Directors integrate technical, commercial and community evidence before making or escalating consequential delivery decisions.



Work moment Situation where the capability is enacted

The monthly capital-gate review where scope, contingency and schedule trade-offs require cross-functional commitment.

Target behaviour Observable action

State decision criteria, compare two viable options, invite dissent, name the owner and document escalation thresholds.



Barrier Skill, motivation, opportunity or system constraint

Ambiguous commercial-delivery decision rights discourage early challenge, while several directors need practice framing uncertainty concisely.



Coaching mechanism How reflection and experiment could help

Not populated in the original worked extract.

Evidence What would demonstrate movement

Not populated in the original worked extract.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T03

TOOL

Intervention fit test

Decide whether coaching is the right response.

Practical guide

Working form

Worked example

EXCEL TAB T03 Intervention fit test

TIME 45-60 minutes per use case; obtain clinical, legal or employee-relations advice where indicated | **OWNER** HR/L&D business partner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Define the performance or development need using behavioural and work evidence, not a requested product.
- 02** Test possible causes across person, role, manager, work design, relationships and wider system.
- 03** Compare coaching with instruction, feedback, mentoring, job redesign, formal action and qualified support routes.

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?

CONTINUE THE METHOD

- 04** Check the intended participant's agency, capacity, opportunity, expectations and psychological availability.
- 05** Decide coach, combine, defer or redirect; document rationale, exclusions, owner and review trigger.

BOUNDARY & CAUTION

Do not use this screening tool to make clinical, legal or formal employment judgments beyond participants' competence.

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.38



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T03

TOOL

Intervention fit test

Decide whether coaching is the right response.

Practical guide

Working form

Worked example

EXCEL TAB T03 Intervention fit test

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

Need Defined performance or development need	
Root causes Person, role, manager, work or system	
Alternatives Training, mentoring, job design, feedback, therapy, formal action	
Readiness Agency, time and psychological availability	
Fit Why coaching is plausible	
Risks Power, distress, conflict, sponsor expectation	
Decision Coach, combine, defer or redirect	

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T03

TOOL

Intervention fit test

Decide whether coaching is the right response.

Practical guide

Working form

Worked example

EXCEL TAB T03 Intervention fit test

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Need Defined performance or development need	Twelve project directors need stronger decision framing and cross-functional influence during contested capital-gate reviews.
Root causes Person, role, manager, work or system	Observed gaps combine individual practice needs with unclear authority between delivery, commercial and asset-management functions.
Alternatives Training, mentoring, job design, feedback, therapy, formal action	Clarify decision rights, train the common gate protocol, provide technical mentoring and retain formal accountability processes.
Readiness Agency, time and psychological availability	All twelve directors opted in, protected ninety minutes monthly and identified live decisions suitable for confidential practice.
Fit Why coaching is plausible	Coaching can individualise rehearsal and reflection; the COO-owned authority redesign addresses barriers coaching cannot resolve.

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

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05 Apply

06 Assure

T04

TOOL

Coaching portfolio map

See all coaching offers, populations, spend, gaps and overlap.

Practical guide

Working form

Worked example

EXCEL TAB T04 Coaching portfolio map

TIME Two-hour mapping workshop, annual deep review and quarterly update when demand or evidence changes | **OWNER** Programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Inventory every coaching-labelled offer, including informal, provider, team, digital and manager pathways.
- 02** Record each offer's purpose, eligibility, volume, mode, duration, owner and full annual cost.
- 03** Compare overlap, gaps, access patterns, demand, complexity, outcomes and risk across the portfolio.

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?

CONTINUE THE METHOD

- 04** Match modes and investment to strategic need rather than grade, precedent or supplier availability.
- 05** Record continue, integrate, redesign, expand or stop decisions with owners and evidence dates.

BOUNDARY & CAUTION

Do not compare offers by cost or participation alone when purpose, complexity and outcome differ materially.

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.41



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T04

TOOL

Coaching portfolio map

See all coaching offers, populations, spend, gaps and overlap.

Practical guide

Working form

Worked example

EXCEL TAB T04 Coaching portfolio map

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

Offer / pathway	Purpose + population	Mode + volume	Full cost	Quality / outcome	Risk / equity	Decision

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



01 Align

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05 Apply

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T04

TOOL

Coaching portfolio map

See all coaching offers, populations, spend, gaps and overlap.

Practical guide

Working form

Worked example

EXCEL TAB T04 Coaching portfolio map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Offer Programme/pathway name	Capital Gate Leadership Coaching Pilot, a six-month pathway within Meridian's project-delivery capability portfolio.
Purpose Strategic or developmental purpose	Improve decision quality and stakeholder influence while testing whether targeted coaching contributes beyond protocol training alone.
Population Eligibility and volume	Twelve project directors with imminent high-complexity gates; expected annual steady-state volume is twenty-four directors.
Mode Manager, internal, external, team or digital	Independent external one-to-one coaching, supported by peer practice and sponsor-owned operating-model action.
Cost Full annual cost	Annualised full cost is GBP252,000, including coaching, supervision, operations, evaluation and participants' protected work time.

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.

T05

TOOL

Stakeholder and power map

Identify influence, interests and power that shape the coaching system.

Practical guide

Working form

Worked example

EXCEL TAB T05 Stakeholder and power map

TIME 60-90 minutes initially; refresh before launch and whenever sponsorship, conflict or authority changes | **OWNER** Programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** List groups who decide, deliver, participate in, influence or receive information about coaching.
- 02** State each stakeholder's legitimate interest, concern and success criterion in their own context.
- 03** Assess formal, informal, information and employment power rather than relying on job title alone.

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?

CONTINUE THE METHOD

- 04** Identify confidentiality pressure, role conflict, exclusion, resistance or dependency each relationship could create.
- 05** Choose brief, consult, involve or govern actions; assign owner, timing, boundary and feedback route.

BOUNDARY & CAUTION

Do not circulate sensitive power hypotheses as factual stakeholder assessments or identifiable coaching intelligence.

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.44



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T05

TOOL

Stakeholder and power map

Identify influence, interests and power that shape the coaching system.

Practical guide

Working form

Worked example

EXCEL TAB T05 Stakeholder and power map

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

Stakeholder	Interest / need	Power (1-5)	Impact (1-5)	Risk / conflict	Engagement + owner

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T05

TOOL

Stakeholder and power map

Identify influence, interests and power that shape the coaching system.

Practical guide

Working form

Worked example

EXCEL TAB T05 Stakeholder and power map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Stakeholder Person/group	Chief Operating Officer, accountable sponsor for portfolio delivery and the associated decision-right redesign.
Interest What they need from coaching	Fewer late escalations, clearer investment choices and credible evidence for a targeted continuation decision.
Power Decision or information power	Approves pilot funding, changes cross-functional authority and chairs the quarterly capital-portfolio board.
Risk Possible pressure or conflict	May seek identifiable session intelligence when a director challenges an executive sponsor or commercial assumption.
Engagement Brief, consult, involve or govern	Govern through agreed aggregate evidence, quarterly decisions and explicit reminders that session content remains private.

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

T06

TOOL

Business case canvas

Secure a decision without inflated benefit claims.

Practical guide

Working form

Worked example

EXCEL TAB T06 Business case canvas

TIME Half-day design session plus finance and assurance review before investment approval | **OWNER** Sponsor + finance + programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Define the evidenced problem, affected work and strategic consequence; separate symptoms from causes.
- 02** Construct credible options including do-minimum, non-coaching interventions and combined designs.
- 03** Describe the proposed population, mode, dosage, enablers, exclusions and delivery assumptions.

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?

CONTINUE THE METHOD

- 04** Estimate direct, indirect and opportunity costs under low, base and high scenarios.
- 05** Present expected benefits, risks, uncertainty, evaluation plan and pre-agreed invest, adapt or stop decision.

BOUNDARY & CAUTION

Do not approve investment from speculative financial returns without alternatives, uncertainty and decision-quality evidence.

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.47



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T06

TOOL

Business case canvas

Secure a decision without inflated benefit claims.

Practical guide

Working form

Worked example

EXCEL TAB T06 Business case canvas

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

Problem Evidence and strategic consequence	
Options Including do-minimum and alternatives	
Proposed offer Population, mode and duration	
Costs Direct, indirect and opportunity	
Benefits Expected contribution and uncertainty	
Risks Controls and residual risk	
Evaluation Decision evidence and timing	
Ask Approval, owner and conditions	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T06

TOOL

Business case canvas

Secure a decision without inflated benefit claims.

Practical guide

Working form

Worked example

EXCEL TAB T06 Business case canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Problem Evidence and strategic consequence	Three recent handovers missed plan after repeated gate rework, late escalation and unresolved commercial-delivery disagreements.
Options Including do-minimum and alternatives	Compare do-minimum, protocol training, mentoring, authority redesign alone, and redesign combined with targeted independent coaching.
Proposed offer Population, mode and duration	Six-month pilot for twelve project directors: six sessions, peer rehearsal, sponsor action and ninety-day follow-up.
Costs Direct, indirect and opportunity	GBP126,000 covers coaches, supervision, operations, evaluation and protected time; scenario range is GBP112,000-GBP142,000.
Benefits Expected contribution and uncertainty	Expected contributions are earlier escalation, clearer gate decisions and less rework; cashable savings remain uncertain.

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

T07

TOOL

Eligibility and equity matrix

Define fair access and identify unintended exclusion.

Practical guide

Working form

Worked example

EXCEL TAB T07 Eligibility and equity matr

TIME 90-minute design review; test with representative users and review access data quarterly | **OWNER** Programme owner + DEI/privacy

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Define each eligible population and record the need-based strategic rationale for inclusion.
- 02** Map nomination, application and trigger routes, including who can approve or decline entry.
- 03** Test every route for status, schedule, language, disability, location, technology and network barriers.

CONTINUE THE METHOD

- 04** Design proportionate adjustments, choice, appeal and alternative-support routes without collecting unnecessary personal data.
- 05** Set access indicators and review disaggregated demand, acceptance, waiting, experience and outcome 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?

BOUNDARY & CAUTION

Do not treat identical provision as equitable or collect protected information without a necessary, governed purpose.

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.

COMMON ERRORS TO AVOID

Letting informal manager sponsorship become an unpublished eligibility requirement; Collecting sensitive identity detail when an access adjustment would be sufficient; Claiming equity because everyone receives an identical format and schedule.

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

BASIS H01 / H04 | H04 source p.50



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T07

TOOL

Eligibility and equity matrix

Define fair access and identify unintended exclusion.

Practical guide

Working form

Worked example

EXCEL TAB T07 Eligibility and equity matr

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

Population	Need / eligibility basis	Entry route	Barrier	Adjustment	Conversion / outcome	Owner / review

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T07

TOOL

Eligibility and equity matrix

Define fair access and identify unintended exclusion.

Practical guide

Working form

Worked example

EXCEL TAB T07 Eligibility and equity matr

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Population Eligible group	Project directors leading a capital workstream through two or more consequential gates within nine months.
Rationale Need and strategic basis	The selected work creates immediate practice opportunities and material portfolio impact, independent of grade or sponsorship network.
Entry route Nomination, application or trigger	Published self-application or manager nomination, followed by a standard need, readiness and conflict screen.
Possible barrier Status, schedule, language, disability, location	Remote-site directors, part-time leaders and colleagues requiring accessible technology may face unequal participation conditions.
Adjustment Design response	Offer remote or in-person choice, captioned platforms, flexible scheduling and an individual access conversation before matching.

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

T08

TOOL

Coaching mode decision matrix

Match delivery mode to need, complexity and risk.

Practical guide

Working form

Worked example

EXCEL TAB T08 Coaching mode decision matr

TIME 45-60 minutes per pathway; specialist review for high-risk, clinical-adjacent or AI-enabled modes | **OWNER** Programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Define the developmental task and distinguish learning, advice, performance, health and system needs.
- 02** Rate complexity using consequence, ambiguity, relationship breadth, risk and likely duration; record the rationale.
- 03** Set the independence needed given sponsorship, assessment, employment and commercial power.

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?

CONTINUE THE METHOD

- 04** Balance required context knowledge against impartiality, confidentiality and the risk of advice replacing coaching.
- 05** Select manager, internal, external, team or digital mode; specify safeguards, combination and escalation route.

BOUNDARY & CAUTION

Do not select coaching mode where clinical care, technical advice or formal accountability is the primary need.

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.

SOURCE / EDITION NOTE

Source weighting prompts retained; live weights are intentionally blank. Agree criteria, weights and non-negotiable eligibility gates locally. The matrix does not authorise AI coaching or replace due diligence.

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

BASIS H01 / H04 | H04 source p.53



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T08

TOOL

Coaching mode decision matrix

Match delivery mode to need, complexity and risk.

Practical guide

Working form

Worked example

EXCEL TAB T08 Coaching mode decision matr

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

Criterion	Weight	Manager	Internal	External	Peer/group	Team	Digital/AI
Need / outcome fit							
Complexity / specialist depth							
Independence / power							
Confidentiality sensitivity							
Context knowledge							
Access / inclusion							
Transfer proximity							
Cost / capacity							

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T08

TOOL

Coaching mode decision matrix

Match delivery mode to need, complexity and risk.

Practical guide

Working form

Worked example

EXCEL TAB T08 Coaching mode decision matr

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Need Developmental task	Practise influencing powerful commercial and asset stakeholders while retaining ownership of live capital decisions.
Complexity Low, medium, high with rationale	High: decisions combine safety, cost, community, schedule and contractual consequences under executive scrutiny.
Independence Required level	High independence is required because sponsor relationships and internal promotion decisions may enter reflection.
Context knowledge Required level	Moderate infrastructure literacy is helpful, but the coach must not substitute for technical or legal specialists.
Power risk Manager/sponsor dynamics	A manager-coach could unintentionally turn exploration into instruction or gather information for performance assessment.

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.

T09

TOOL

Programme theory of change

Make the expected causal chain and assumptions explicit.

Practical guide

Working form

Worked example

EXCEL TAB T09 Programme theory of change

TIME Half-day workshop plus evidence challenge and stakeholder validation before baseline collection | **OWNER** Evaluation lead

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Specify people, time, budget, systems, data and enabling conditions available to the programme.
- 02** Describe coaching activities separately from manager, sponsor, workflow and system actions.
- 03** State the psychological, behavioural and contextual mechanisms expected to connect activities with change.

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?

CONTINUE THE METHOD

- 04** Sequence near, intermediate and organisational outcomes with realistic timing and observable indicators.
- 05** Record assumptions, alternative explanations, risks and the evidence that would support adaptation or stopping.

BOUNDARY & CAUTION

Do not present the theory as proof of causation; it is a testable explanation for evaluation.

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.56



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T09

TOOL

Programme theory of change

Make the expected causal chain and assumptions explicit.

Practical guide

Working form

Worked example

EXCEL TAB T09 Programme theory of change

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

Inputs	Activities	Mechanisms	Near outcomes	Behaviour / intermediate	Work outcomes	Assumption s / alternatives

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T09

TOOL

Programme theory of change

Make the expected causal chain and assumptions explicit.

Practical guide

Working form

Worked example

EXCEL TAB T09 Programme theory of change

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Inputs People, time, budget, systems	Twelve directors, six independent coaches, GBP126,000, protected practice time, supervision and capital-gate baseline data.
Activities Coaching and enabling actions	Individual sessions, gate-decision rehearsal, stakeholder feedback, peer practice, manager support and COO-led authority clarification.
Mechanisms How change is expected	Psychological space, specific feedback, alternative generation, implementation intentions and supported experiments in consequential meetings.
Near outcomes Learning, confidence, choices	Clearer goals, broader options, greater challenge confidence and shared understanding of decision ownership.
Intermediate Application and behaviour	Directors state criteria, invite dissent, escalate earlier and record accountable decisions consistently at live gates.

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

T10

TOOL

Coaching risk register

Identify and control programme risks before delivery.

Practical guide

Working form

Worked example

EXCEL TAB T10 Coaching risk register

TIME 90-minute risk workshop; monthly review during pilot and immediate review after any material incident | **OWNER** Quality lead

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Write each risk as a defined event, cause and possible harm rather than a broad topic.
- 02** Identify affected people, rights, operations, evidence and trust, including less powerful parties.
- 03** Score likelihood and impact using agreed anchors; record uncertainty and existing 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

Writing a topic label instead of a defined event, cause and consequence; Relying on policy text without a tested control, owner or response trigger; Scoring operational loss while overlooking participant harm and loss of trust.

CONTINUE THE METHOD

- 04** Assign preventive, detective and recovery controls with named owners, due dates and test methods.
- 05** Calculate residual exposure and set review, escalation, acceptance and pause thresholds with competent authority.

BOUNDARY & CAUTION

Do not replace qualified safeguarding, legal, privacy, security or clinical risk procedures with this general register.

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.59



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T10

TOOL

Coaching risk register

Identify and control programme risks before delivery.

Practical guide

Working form

Worked example

EXCEL TAB T10 Coaching risk register

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

Risk event + cause	Affected	L	I	Controls	Owner	Residual	Trigger / action

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T10

TOOL

Coaching risk register

Identify and control programme risks before delivery.

Practical guide

Working form

Worked example

EXCEL TAB T10 Coaching risk register

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Risk Event and cause	An executive sponsor pressures a coach to reveal whether a director criticised the portfolio governance model.
Affected parties Who may be harmed	The coachee, coach, programme team, sponsor and future participants whose trust depends on confidentiality.
Likelihood 1-5	Rated 3 of 5 because informal intelligence requests occurred in two earlier development programmes.
Impact 1-5	Rated 4 of 5: disclosure could harm employment relationships, participation and the programme's legitimacy.
Control Preventive/detective response	Brief sponsors, contract information boundaries, log requests, provide coach consultation and escalate repeated pressure to governance.

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

T11

TOOL

Governance RACI

Clarify accountability across the coaching ecosystem.

Practical guide

Working form

Worked example

EXCEL TAB T11 Governance RACI

TIME 60-90 minutes to agree; governance approval and review after any role or supplier change | **OWNER** Programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** List material decisions, recurring activities, controls and exceptions across the coaching lifecycle.
- 02** Assign one responsible role that performs each activity and can evidence completion.
- 03** Name one accountable role with authority to own the result and resolve failure.

CONTINUE THE METHOD

- 04** Select consulted roles whose expertise or rights must shape the decision before it is made.
- 05** Specify informed audiences, timing and minimum information; test gaps, conflicts and provider self-assurance.

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?

BOUNDARY & CAUTION

Do not assign accountability to a committee or supplier that lacks authority to correct failure.

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.

COMMON ERRORS TO AVOID

Assigning several accountable roles so no one owns the final decision; Naming a committee without identifying the role that does the work; Allowing a provider to assure or approve its own unresolved quality issue.

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

BASIS H01 / H04 | H04 source p.62



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T11

TOOL

Governance RACI

Clarify accountability across the coaching ecosystem.

Practical guide

Working form

Worked example

EXCEL TAB T11 Governance RACI

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

Decision / activity	R	A	C	I	Confidentiality / conflict boundary

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T11

TOOL

Governance RACI

Clarify accountability across the coaching ecosystem.

Practical guide

Working form

Worked example

EXCEL TAB T11 Governance RACI

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision/activity What must be governed	Approve any scale, adaptation, pause or stop decision after the six-month capital-gate pilot.
Responsible Does the work	Director of Organisational Capability prepares the evidence pack and documented recommendation.
Accountable Owns the result	Chief Operating Officer owns the portfolio decision and ensures required system actions are resourced.
Consulted Provides input	Evaluation lead, practice lead, data protection officer, employee representative and participating project directors.
Informed Receives information	Capital Portfolio Board, line managers, coaches, procurement and all eligible project-delivery leaders.

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

T12

TOOL

Programme readiness gate

Confirm minimum conditions for safe launch.

Practical guide

Working form

Worked example

EXCEL TAB T12 Programme readiness gate

TIME 90-minute evidence-based gate meeting after pre-read; specialist sign-off required for unresolved protection items | **OWNER** Steering group

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Verify the approved charter, pathway purpose, exclusions and accountable launch decision under Purpose.
- 02** Confirm named roles, protected capacity, supplier readiness and participant support under People.
- 03** Inspect coach selection, matching, contracting, supervision and service recovery evidence under Practice.

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?

CONTINUE THE METHOD

- 04** Test ethics, confidentiality, data, complaints, referral, safeguarding and incident routes under Protection.
- 05** Confirm baseline, evaluation, access and decision thresholds under Proof; record go, conditional go or no-go.

BOUNDARY & CAUTION

Do not launch on a conditional protection item unless an authorised owner, deadline and safe interim control exist.

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.65



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T12

TOOL

Programme readiness gate

Confirm minimum conditions for safe launch.

Practical guide

Working form

Worked example

EXCEL TAB T12 Programme readiness gate

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

Readiness criterion	Evidence	Status: pass / conditional / fail	Condition, owner and due date
Purpose and value hypothesis			
Population and equity			
Governance and capacity			
Coach/provider competence			
Contracts and sponsor boundaries			
Referral/complaint routes			
Data/technology controls			
Evaluation and baseline			
Communications and accessibility			



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T12

TOOL

Programme readiness gate

Confirm minimum conditions for safe launch.

Practical guide

Working form

Worked example

EXCEL TAB T12 Programme readiness gate

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose Charter approved	Approved charter links coaching to gate-decision behaviour and explicitly excludes technical remediation or covert assessment.
People Roles and capacity ready	Sponsor, programme owner, practice lead, evaluator, operations coordinator and six authorised coaches have protected capacity.
Practice Coach standards and matching ready	Observed-practice selection is complete; matching choice, rematch service level and supervision cadence are operational.
Protection Ethics, data and escalation ready	Confidentiality, data retention, complaint, safeguarding and urgent specialist-referral routes passed a tabletop exercise.
Proof Baseline and evaluation ready	Baseline indicators, behavioural interview guides and pre-agreed continue-adapt-stop thresholds are approved before enrolment.

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

T75

TOOL

Service blueprint and participant journey

Design the complete participant, sponsor and operational experience across the service lifecycle.

Practical guide

Working form

Worked example

EXCEL TAB T75 Service blueprint and parti

TIME 2-3 hour workshop plus user validation | OWNER Programme owner + service designer

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Select a journey scope, participant group and material scenario to map.
- 02** Trace participant actions, choices, waits and access needs stage by stage.
- 03** Map visible communications, people, channels and service recovery beside them.

CONTINUE THE METHOD

- 04** Link backstage processes, systems, controls and evidence to each touchpoint.
- 05** Assign an owner and SLA for delivery, escalation and hand-off.
- 06** Test the blueprint with representative users and repair gaps before launch.

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

Mapping the participant interface while omitting backstage controls and hand-offs; Publishing an SLA with no escalation or recovery path; Assuming every participant can use the same channel and journey.

BOUNDARY & CAUTION

Do not approve a blueprint based only on staff assumptions; representative participants must test the actual journey.

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.68



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T75

TOOL

Service blueprint and participant journey

Design the complete participant, sponsor and operational experience across the service lifecycle.

Practical guide

Working form

Worked example

EXCEL TAB T75 Service blueprint and parti

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

Journey stage	Participant / sponsor action	Visible service	Backstage process	Owner / SLA	Evidence	Failure / recovery

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

T75

TOOL

Service blueprint and participant journey

Design the complete participant, sponsor and operational experience across the service lifecycle.

Practical guide

Working form

Worked example

EXCEL TAB T75 Service blueprint and parti

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Journey stage Discover, request, approve, match, contract, coach, review, close, follow up	Matching and chemistry conversation after eligibility, choice and confidentiality briefing.
Participant action What the coachee does	States access preferences, reviews two suitable profiles and accepts or requests rematch.
Visible service What the participant experiences	Plain-language profiles, booking link, chemistry guide and no-fault rematch route.
Backstage process Operations, systems and hand-offs	Conflict screening, availability validation, access adjustment and minimum-data matching record.
Owner/SLA Accountable role and time standard	Service coordinator offers suitable profiles within five working days; urgent access issues escalate sooner.

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

T76

TOOL

Coach capability framework

Define role-specific capabilities and proficiency expectations for managers, internal coaches, professional coaches and supervisors.

Practical guide

Working form

Worked example

EXCEL TAB T76 Coach capability framework

TIME Half-day design; annual evidence and role review | **OWNER** Practice lead

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Define each coaching role, scope, complexity and excluded activity.
- 02** Select capability domains evidenced by safe and effective performance.
- 03** Write observable foundation, practitioner and advanced anchors for every domain.

CONTINUE THE METHOD

- 04** Validate anchors across practice contexts, access needs and assessor interpretations.
- 05** Map evidence methods to selection, development, authorisation and supervision decisions.
- 06** Review after incidents, role change and the annual practice evidence cycle.

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?

BOUNDARY & CAUTION

The framework defines role evidence for Meridian and does not confer a professional credential or universal scope.

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.

COMMON ERRORS TO AVOID

Writing broad capability labels without behaviourally observable anchors; Making higher levels reflect seniority rather than case complexity and competence; Authorising work beyond the evidence demonstrated for the specified role.

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

BASIS H01 / H04 | H04 source p.71



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T76

TOOL

Coach capability framework

Define role-specific capabilities and proficiency expectations for managers, internal coaches, professional coaches and supervisors.

Practical guide

Working form

Worked example

EXCEL TAB T76 Coach capability framework

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

Capability	Manager foundation	Internal/professional practitioner	Advanced / supervisor	Evidence / development
Ethics / role				
Contracting				
Relationship				
Listening / inquiry				
Awareness / choice				
Application				
Context / inclusion				
Evidence / reflection				
Technology / AI				

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T76

TOOL

Coach capability framework

Define role-specific capabilities and proficiency expectations for managers, internal coaches, professional coaches and supervisors.

Practical guide

Working form

Worked example

EXCEL TAB T76 Coach capability framework

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Capability Ethics, contracting, relationship, inquiry, challenge, context, application, evidence	Ethical three-way contracting for sponsor-funded capital-project coaching with clear information boundaries.
Role Manager, internal coach, professional coach or supervisor	Internal and external coaches authorised for individual project-director assignments.
Foundation Minimum observable behaviour	Explains roles and confidentiality using the approved contract, seeking help for exceptions.
Practitioner Independent behaviour in complexity	Surfaces power differences, resolves sponsor tensions and re-contracts after material change.
Advanced Systemic judgment and development of others	Handles complex multi-party conflicts, guides peers and improves organisational contracting controls.

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

T81

TOOL

Provider RFP and due-diligence scorecard

Procure a provider whose quality, ethics, data and delivery model fit the organisation's need.

Practical guide

Working form

Worked example

EXCEL TAB T81 Provider RFP and due diligence

TIME Half-day scoring after demonstrations; specialist due diligence as required | **OWNER** Procurement + programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Translate the use case and risk profile into weighted, testable requirements.
- 02** Set mandatory ethics, competence, data, accessibility and incident-cooperation gates.
- 03** Specify acceptable evidence, demonstrations, scenarios and reference checks.

CONTINUE THE METHOD

- 04** Score independently, calibrate assessors and document every clarification.
- 05** Complete specialist due diligence and convert residual risk into contract conditions.
- 06** Select on evidence-weighted value, preserving review, audit and exit rights.

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

Designing weights to legitimise a preferred provider after the fact; Scoring written assurances without demonstrations, records or reference checks; Letting price compensate for failure of an ethics, competence or data gate.

BOUNDARY & CAUTION

Do not enter market scoring until decision authority, requirements, mandatory gates and evaluation rules are approved.

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.74



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T81

TOOL

Provider RFP and due-diligence scorecard

Procure a provider whose quality, ethics, data and delivery model fit the organisation's need.

Practical guide

Working form

Worked example

EXCEL TAB T81 Provider RFP and due-diligence

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

Requirement	Weight	Provider evidence	Score 0-4	Weighted	Risk / contract condition
Service purpose/model					
Coach selection/observation					
Matching/rematch					
Supervision/CPD					
Ethics/complaints					
Data/security/AI					
Inclusion/access					
Evaluation/claims					
Operations/continuity					
Commercial/value					

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

T81

TOOL

Provider RFP and due-diligence scorecard

Procure a provider whose quality, ethics, data and delivery model fit the organisation's need.

Practical guide

Working form

Worked example

EXCEL TAB T81 Provider RFP and due-diligence

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Requirement Purpose, coach quality, matching, supervision, data, AI, inclusion, evaluation	Demonstrate ethical contracting, observed coach competence, inclusive matching and verifiable data deletion.
Weight Importance to the service	12%; mandatory gate for ethics, privacy and cooperation with independent complaints.
Provider evidence Document, demonstration or test	Live contracting demonstration, assessor records, accessibility test and deletion certificate example.
Score 0 absent to 4 strong	3 of 4: strong controls; subprocessor exit evidence requires clarification before award.
Risk/condition Gap and contractual control	Contract award conditional on tested data export, 30-day deletion and annual continuity exercise.

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

T82

TOOL

Implementation workplan and milestone tracker

Turn the 6A design into sequenced work with dependencies, resources and gates.

Practical guide

Working form

Worked example

EXCEL TAB T82 Implementation workplan and

TIME 30-45 minutes weekly; gate review at each milestone | OWNER Programme manager

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Break implementation into accountable workstreams and evidence-based milestones.
- 02** Assign one owner, realistic start and due date to each milestone.
- 03** Map dependencies, decision gates and the evidence required for completion.

CONTINUE THE METHOD

- 04** Update status from verifiable progress, not percentage estimates alone.
- 05** Trigger recovery action when a dependency, date or quality gate slips.
- 06** Review weekly and escalate decisions beyond the workstream owner's authority.

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

Calling an activity complete when its gate evidence is absent;
Hiding dependencies until they become missed milestone explanations; Reporting green status while recovery action remains ownerless or overdue.

BOUNDARY & CAUTION

The tracker does not replace the risk register, decision log, change control or formal governance approvals.

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.77



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T82

TOOL

Implementation workplan and milestone tracker

Turn the 6A design into sequenced work with dependencies, resources and gates.

Practical guide

Working form

Worked example

EXCEL TAB T82 Implementation workplan and

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

Workstream / milestone	Owner	Start	Due	Dependency	Status	Gate / evidence	Recovery action

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T82

TOOL

Implementation workplan and milestone tracker

Turn the 6A design into sequenced work with dependencies, resources and gates.

Practical guide

Working form

Worked example

EXCEL TAB T82 Implementation workplan and

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Workstream Strategy, governance, service, capability, data, evaluation, communications	Coach quality, matching and accessible participant journey for the controlled pilot extension.
Milestone Verifiable output	Complete observed-practice calibration and authorise the final six-coach panel by 20 October.
Owner Accountable role	Coaching quality lead, accountable to the cross-functional programme governance board.
Start/due Dates	Start 2 September; evidence pack due 18 October; decision due 20 October.
Dependency What must be complete first	Approved role scope, assessor training, accessible scenario materials and completed conflict declarations.

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

T83

TOOL

Communications and stakeholder plan

Build understanding, trust and demand without overstating coaching or confidentiality.

Practical guide

Working form

Worked example

EXCEL TAB T83 Communications and stakehol

TIME 60-90 minutes; approve before launch or material change | OWNER Communications lead + programme owner

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Map each audience's role, power, likely concern and information need.
- 02** Write accurate messages covering purpose, choice, boundaries and support.
- 03** Choose accessible channels and timing appropriate to the audience's decision.

CONTINUE THE METHOD

- 04** Assign content owner, specialist approvers and publication authority.
- 05** Provide a question, feedback and correction route in every major communication.
- 06** Test comprehension with representatives and revise after material change.

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 promotional claims that overstate benefit or obscure voluntariness; Briefing participants while leaving managers unclear about confidentiality boundaries; Publishing messages without an accessible feedback or question route.

BOUNDARY & CAUTION

Do not promote enrolment before service capacity, participant protections and qualified routes are operational.

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.80



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T83

TOOL

Communications and stakeholder plan

Build understanding, trust and demand without overstating coaching or confidentiality.

Practical guide

Working form

Worked example

EXCEL TAB T83 Communications and stakehol

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

Audience	Need / concern	Message	Channel / timing	Owner / approver	Feedback route	Evidence

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

T83

TOOL

Communications and stakeholder plan

Build understanding, trust and demand without overstating coaching or confidentiality.

Practical guide

Working form

Worked example

EXCEL TAB T83 Communications and stakehol

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Audience Coachee, manager, sponsor, coach, employee body, executive	Eligible project directors and their line managers across the Northern Renewal portfolio.
Need/concern What they must know or may fear	Voluntariness, confidentiality, workload, access, manager role and whether coaching affects promotion.
Message Purpose, rights, boundaries and call to action	Coaching is voluntary developmental support; managers enable application and receive no session content.
Channel/timing Format and sequence	Accessible briefing, manager Q&A and intranet guide three weeks before expressions of interest.
Owner Sender and approver	Programme lead drafts; privacy, accessibility and employee-relations leads approve before publication.

WHAT THE COACH SHOULD NOTICE

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TRANSFER / NEXT DECISION

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01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T84

TOOL

Capacity, budget and demand model

Estimate demand, coach capacity, service levels and full cost under alternative scenarios.

Practical guide

Working form

Worked example

EXCEL TAB T84 Capacity budget and demand

TIME 90-120 minutes; refresh quarterly and before scope changes | OWNER Programme owner + finance

BRING Current strategy, workforce/capability and performance evidence | Stakeholder and population evidence | Existing provision, cost and risks

RUN THE ACTIVITY

- 01** Forecast eligible population, interest, conversion and starts in three scenarios.
- 02** Define each pathway's sessions, duration, rematch and transfer requirements.
- 03** Calculate usable coach capacity after utilisation, leave and contingency.

CONTINUE THE METHOD

- 04** Build full unit and portfolio cost from auditable assumptions.
- 05** Model matching wait, supervision, operations and access constraints under pressure.
- 06** Set demand triggers for added capacity, prioritisation, delay or scope change.

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

Planning from one optimistic demand forecast without sensitivity analysis; Using full coach availability as deliverable capacity with no contingency; Excluding participant time, matching, supervision or rematch from full cost.

BOUNDARY & CAUTION

This is a planning model, not budget authority; retain uncertainty and refresh assumptions when demand or scope changes.

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.83



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T84

TOOL

Capacity, budget and demand model

Estimate demand, coach capacity, service levels and full cost under alternative scenarios.

Practical guide

Working form

Worked example

EXCEL TAB T84 Capacity budget and demand

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

Demand/capacity component	Low	Base	High	Formula / assumption
Eligible / forecast requests				
Expected starts				
Sessions and hours				
Coach capacity / utilisation				
Supervision / operations				
Unit and full cost				
Matching wait / SLA				
Contingency / rematch				

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

T84

TOOL

Capacity, budget and demand model

Estimate demand, coach capacity, service levels and full cost under alternative scenarios.

Practical guide

Working form

Worked example

EXCEL TAB T84 Capacity budget and demand

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Population/demand Eligible population, expected requests and starts	Thirty eligible directors; base case assumes 60% interest and 90% conversion to starts.
Pathway Mode and number of sessions	Six individual sessions over four months, with optional rematch and 90-day transfer review.
Capacity Coach hours, utilisation and supervision	Three coaches provide 144 delivery hours at 75% planned utilisation, plus contingency.
Unit cost Direct and indirect cost	Base full cost GBP 8,150 per start, including participant time, operations and evaluation.
Scenario Low, base and high demand	High demand adds six starts, requires a fourth coach and extends matching SLA by two days.

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

X01

ACTIVITY

Executive role mandate

Turn a broad executive job title into a specific account of contribution, authority and the leadership work that coaching can support.

Practical guide

Working form

Worked example

EXCEL TAB X01 Executive role mandate

TIME 45 minutes together; 20 minutes preparation

BRING Current role description and strategic priorities | Two recent decisions that were difficult to make | Only information authorised for the coaching relationship

RUN THE ACTIVITY

- 01** Invite the executive to describe why the role exists without reciting its job description. Record the business or public-service outcome, whose experience matters and what would be lost without the role.
- 02** Draw three columns: accountable outcomes, decisions owned, and dependencies. Place each recent decision in the columns and identify any ambiguity about authority rather than interpreting it as lack of confidence.
- 03** Compare the formal mandate with expectations from the sponsor, peers and direct reports. Mark each expectation as confirmed, inferred or disputed, retaining differences rather than forcing agreement.

QUESTIONS TO OPEN THINKING

What are you accountable for that only your role can settle?

Which expectation have you accepted without checking?

What is a behaviour question, and what is an authority question?

CONTINUE THE METHOD

- 04** Identify the few moments in which leadership behaviour matters most: a gate review, a delegation conversation or a cross-functional trade-off. Describe an observable action, not a personality quality.
- 05** Choose one coachable focus and one organisational clarification. Agree who can clarify the latter; the coach must not quietly become the executive's proxy negotiator.
- 06** Ask the coachee to explain the revised mandate in two minutes. Capture the one question to take to the sponsor and the practice to explore in Assess.

BOUNDARY & CAUTION

Do not use coaching to legitimise unsafe responsibility, bypass specialist authorisation or resolve a disputed employment contract.

BETWEEN SESSIONS / HAND-OFF

Before the next session, ask the sponsor one neutral mandate question. Bring the answer and one real example of how it changes the leadership task.

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

BASIS H01 | Original executive application



X01 Executive role mandate

ACTIVITY

Turn a broad executive job title into a specific account of contribution, authority and the leadership work that coaching can support.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Purpose of the role

02 Accountable outcomes

03 Decisions and boundaries

05 Unconfirmed expectations

04 Expected leadership moments

06 Coaching focus and next step

Basis: H01 | Original executive application

X01 Executive role mandate

ACTIVITY

Turn a broad executive job title into a specific account of contribution, authority and the leadership work that coaching can support.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Purpose of the role

M-07 must make capital-gate decisions dependable across MetroLink East, without taking technical approval away from the accountable specialists.

02 Accountable outcomes

A usable decision at each gate; unresolved evidence and conditions explicitly recorded. Delivery speed alone is insufficient.

03 Decisions and boundaries

M-07 owns the integrated recommendation. Engineering retains technical sign-off and the sponsor approves material scope changes.

05 Unconfirmed expectations

The sponsor appears to expect same-day approval. M-07 will check whether this applies when a mandatory assurance is missing.

04 Expected leadership moments

At the monthly review, invite competing evidence before stating a preferred recommendation.

06 Coaching focus and next step

Practise framing the decision and inviting challenge; separately obtain a written clarification of the approval boundary before the next gate.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X02

ACTIVITY

Leadership impact compass

Help an executive select a development focus from the effect their leadership should have on stakeholders, rather than from an attractive list of personal qualities.

Practical guide

Working form

Worked example

EXCEL TAB X02 Leadership impact compass

TIME 40 minutes

BRING One strategic priority | A recent leadership episode | Blank paper with four labelled areas: direction, relationships, delivery and wider consequences

RUN THE ACTIVITY

- 01** Ask the coachee to name a situation that matters within the next eight weeks. Define who would notice a useful difference and what they would see or hear.
- 02** Use the four areas as prompts, not dimensions of a test. Describe desired impact in each area and identify tensions, such as speed versus participation.
- 03** Put available evidence beside each claim. An intention belongs in a separate box from a stakeholder's reported experience or a work record.

CONTINUE THE METHOD

- 04** Select the impact with the strongest combination of relevance and scope for action. Discuss what must be protected while it changes; do not encourage the executive to maximise all four areas.
- 05** Translate the selected impact into one behaviour under the executive's control. Agree what useful support or permission is required from others.
- 06** State a provisional value hypothesis and its uncertainty. Link the behavioural focus to a baseline tool and an agreed review date.

QUESTIONS TO OPEN THINKING

Who would experience a difference if this worked?

What could improve locally but become worse elsewhere?

What would count as enough progress to keep learning?

BOUNDARY & CAUTION

This compass is a reflective organising device. It has no norms, pass mark, ideal shape or overall leadership score.

BETWEEN SESSIONS / HAND-OFF

Ask one affected colleague what a useful meeting outcome would look like. Do not present the four areas as a compulsory rating survey.

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

BASIS H01 | Original executive application

X02 Leadership impact compass

ACTIVITY

Help an executive select a development focus from the effect their leadership should have on stakeholders, rather than from an attractive list of personal qualities.

Guide

Worksheet

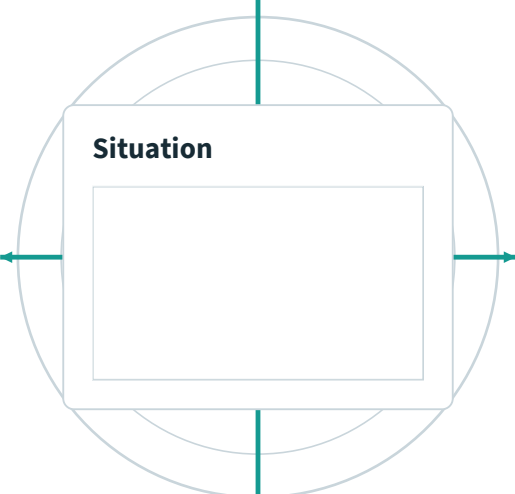
Example

LIVE WORKSHEET

03 Relationship impact

02 Direction impact

05 Consequences to protect



The diagram shows a central circle with a square in the middle labeled 'Situation'. Four lines extend from the circle to four surrounding boxes: '02 Direction impact' (top), '04 Delivery impact' (bottom), '03 Relationship impact' (left), and '05 Consequences to protect' (right). Arrows point from the central 'Situation' box towards each of these four boxes.

06 Chosen focus and evidence

Basis: H01 | Original executive application

X02 Leadership impact compass

ACTIVITY

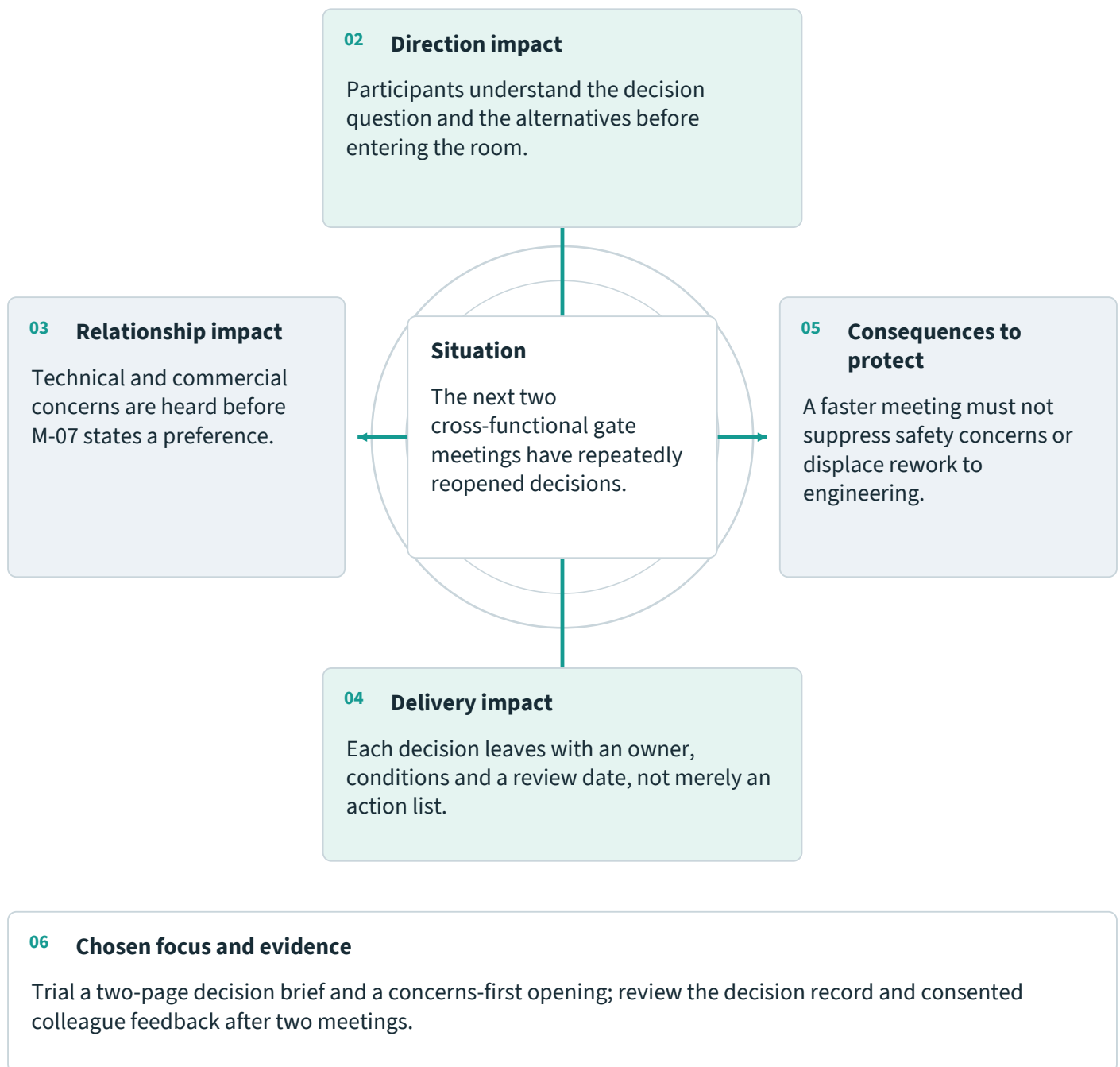
Help an executive select a development focus from the effect their leadership should have on stakeholders, rather than from an attractive list of personal qualities.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE



Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X03

ACTIVITY

Role-transition bridge

Distinguish the leadership habits to carry forward, retire and develop when an executive enters a broader role.

Practical guide

Working form

Worked example

EXCEL TAB X03 Roletransition bridge

TIME 50 minutes; 15 minutes independent reflection

BRING Previous and new role accountabilities | Examples of earlier success | Known transition constraints

RUN THE ACTIVITY

- 01** Draw the previous role on one side and the new role on the other. Invite the coachee to describe the differences in decisions, time horizon and relationships.
- 02** Ask which habits earned success previously. For each, examine where it still helps and where its unmodified use could create a bottleneck.
- 03** Identify losses as well as opportunities: expertise, peer membership, certainty or visibility. Give the coachee permission to keep this discussion work-focused and decline personal exploration.

QUESTIONS TO OPEN THINKING

What made you successful that now needs a different dosage?

What are you afraid will be lost if you delegate this?

Which new responsibility needs practice rather than confidence talk?

CONTINUE THE METHOD

- 04** Map the new contribution onto three categories: retain deliberately, stop or reduce, and practise. Require a concrete example in each category.
- 05** Choose one safe transition experiment and one expectation to renegotiate. Agree who needs to know; avoid making the former team responsible for the leader's adjustment.
- 06** Write a 30-day bridge statement and a review question. Revisit it when the role changes rather than treating it as a fixed identity.

BOUNDARY & CAUTION

Do not assume every promotion requires the same transition or that reluctance reflects psychological resistance. Missing authority and staffing may be the real issue.

BETWEEN SESSIONS / HAND-OFF

Record two occasions when an old habit appeared. Note whether it helped, obstructed or was necessary, and bring the evidence without self-blame.

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

BASIS H01 | Original executive application



X03 Role-transition bridge

ACTIVITY

Distinguish the leadership habits to carry forward, retire and develop when an executive enters a broader role.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Previous success pattern

02 New mandate



03 Retain deliberately

04 Reduce or release

05 New practice

06 Thirty-day bridge

Basis: H01 | Original executive application



X03 Role-transition bridge

ACTIVITY

Distinguish the leadership habits to carry forward, retire and develop when an executive enters a broader role.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Previous success pattern

M-07 personally solved design-interface problems as a functional specialist.

02 New mandate

As project director, integrate specialists' evidence and secure decisions across functions.

03 Retain deliberately

Use technical curiosity to ask a precise question, not to rewrite every recommendation.

04 Reduce or release

Stop routinely editing the engineering lead's draft before asking what decision support is needed.

05 New practice

Delegate one interface recommendation with explicit constraints and a checkpoint, then inquire before taking it back.

06 Thirty-day bridge

Become a clearer integrator rather than the fastest expert; review two delegated decisions and any justified intervention.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X04

ACTIVITY

Priority and opportunity-cost review

Choose what coaching will address by making competing priorities, effort and the cost of adding another commitment visible.

Practical guide

Working form

Worked example

EXCEL TAB X04 Priority and opportunitycos

TIME 35 minutes

BRING Current priorities and calendar | Known operational deadlines | Time available for practice

RUN THE ACTIVITY

- 01** Ask the coachee to list no more than six plausible coaching themes. Give each a real work example so broad labels such as presence do not dominate the conversation.
- 02** For each theme, discuss why it matters now, what it could enable and what would happen if work on it were deferred. Do not manufacture urgency.
- 03** Estimate the practice effort and the opportunity it would displace. Distinguish protected time from time the executive hopes will appear.

QUESTIONS TO OPEN THINKING

What will you stop doing to make this possible?

Which attractive theme is not the most useful one now?

What condition would make us reconsider the not-now list?

CONTINUE THE METHOD

- 04** Identify dependencies. A theme that requires a new decision right or a repaired system may need parallel management action before coaching can help.
- 05** Select one primary focus and at most one supporting focus. Place the remaining themes in a deliberate not-now list, with a trigger for reconsidering them.
- 06** Agree what will stop, shrink or move to create practice time. Confirm the decision in the coachee's words and update the engagement goal.

BOUNDARY & CAUTION

Ratings, when used, are local discussion aids. Do not turn a weighted priority number into proof of personal worth or business return.

BETWEEN SESSIONS / HAND-OFF

Make one actual calendar change and tell the relevant person what is being reduced. Bring evidence that practice time was feasible.

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

BASIS H01 | Original executive application



X04 Priority and opportunity-cost review

ACTIVITY

Choose what coaching will address by making competing priorities, effort and the cost of adding another commitment visible.

Guide

Worksheet

Example

LIVE WORKSHEET

PRIORITY / EFFORT PLOTTER

Contribution now



Place up to six themes. Define the axes together; compare priorities, not people.

01 Candidate themes

02 Priority selected

03 Supporting theme

04 Effort and displacement

05 Dependencies

06 Not-now and trigger

Basis: H01 | Original executive application

X04 Priority and opportunity-cost review

ACTIVITY

Choose what coaching will address by making competing priorities, effort and the cost of adding another commitment visible.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

PRIORITY / EFFORT PLOTTER

Contribution now



Illustrative placement: 1 challenge; 2 delegation; 3 career direction; 4 presentation polish.

01 Candidate themes

Delegation, gate-meeting challenge, career direction and presentation polish.

03 Supporting theme

Delegation of evidence preparation supports better challenge in those meetings.

05 Dependencies

Sponsor must agree that unresolved technical conditions can be recorded rather than hidden to secure approval.

02 Priority selected

Gate-meeting challenge, because two consequential decisions are due within six weeks.

04 Effort and displacement

Two 20-minute rehearsals and a 15-minute debrief replace one routine slide-polishing session each week.

06 Not-now and trigger

Career exploration is deferred until the two gate reviews are complete, unless the role mandate changes first.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X05

ACTIVITY

Purpose, values and leadership choices

Connect personally meaningful values to difficult executive choices without prescribing a preferred value system.

Practical guide

Working form

Worked example

EXCEL TAB X05 Purpose values and leadersh

TIME 50 minutes

BRING Two work choices that felt meaningful or uncomfortable | Optional blank value cards supplied by the coachee | A current leadership decision

RUN THE ACTIVITY

- 01** Invite two stories: one in which work felt worthwhile and one in which a choice felt wrong. Ask for the situation and behaviour before asking for abstract values.
- 02** Offer provisional value words only after listening, and ask the coachee to accept, rename or reject them. Separate organisational slogans from personally endorsed meanings.
- 03** Select three values and define each through a behaviour. For example, fairness might involve explaining criteria rather than treating every request identically.

QUESTIONS TO OPEN THINKING

When have you felt proud of how you decided, not just the result?

Which two values are pulling in different directions?

What would this value look like to someone working with you?

CONTINUE THE METHOD

- 04** Explore a current trade-off between two legitimate values. Ask what each protects, who is affected and what the executive can realistically influence.
- 05** Choose a values-consistent action and an explicit constraint. Where law, safety or organisational policy applies, obtain proper advice instead of treating values as permission to bypass it.
- 06** Record a short purpose statement and the next work choice through which it will be tested. Review the consequences rather than judging whether the statement sounds inspiring.

BOUNDARY & CAUTION

Participation is voluntary. Do not impose religious, cultural, political or personal values or infer them from nationality, identity or a test profile.

BETWEEN SESSIONS / HAND-OFF

Notice one value tension during the week. Record the action and consequence, not a rating of whether you are a good person.

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

BASIS H01 / R21 | Original executive application

X05 Purpose, values and leadership choices

ACTIVITY

Connect personally meaningful values to difficult executive choices without prescribing a preferred value system.

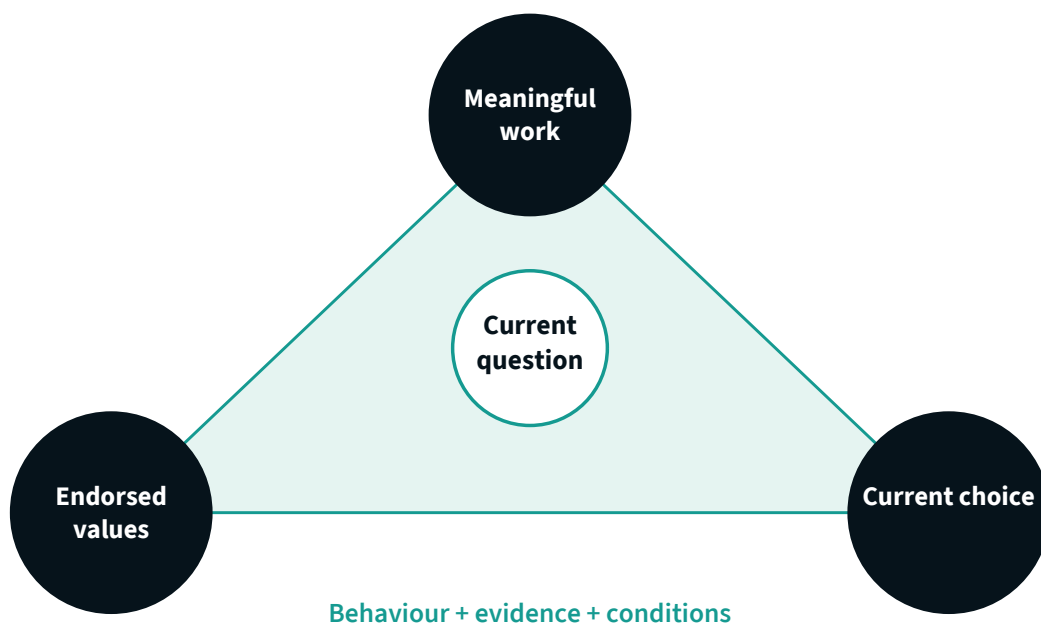
Guide

Worksheet

Example

LIVE WORKSHEET

VALUES AND CHOICE TRIANGLE



Use all three lenses. A personal explanation does not remove organisational responsibility.

01 Meaningful episode

02 Value and definition

03 Second value

04 Current tension

05 Chosen action

06 Purpose in practice

Basis: H01 / R21 | Original executive application

X05 Purpose, values and leadership choices

ACTIVITY

Connect personally meaningful values to difficult executive choices without prescribing a preferred value system.

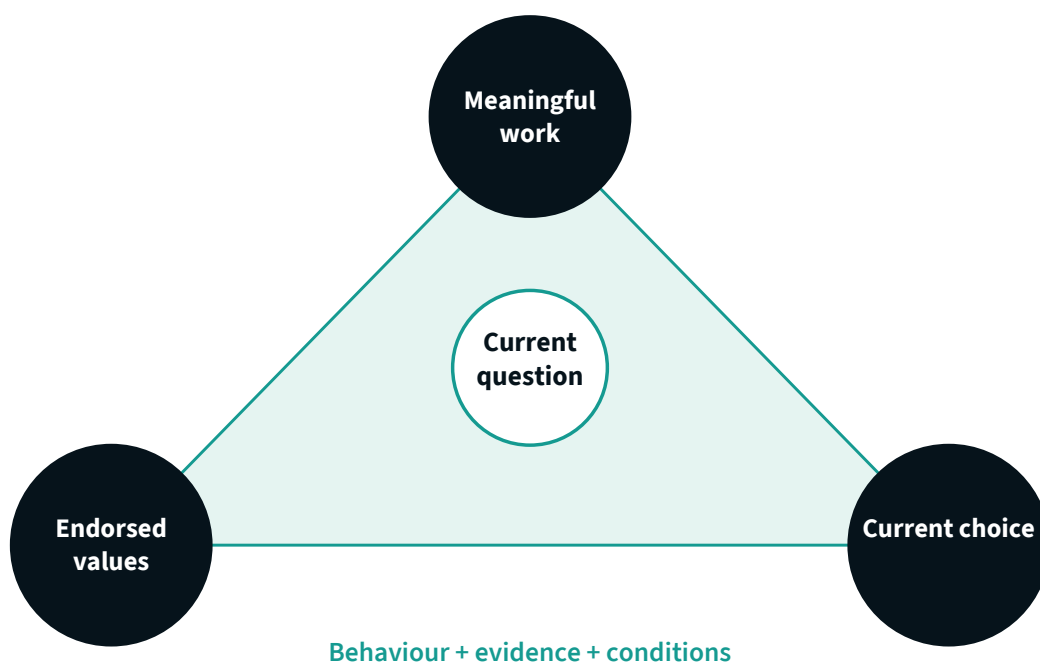
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

VALUES AND CHOICE TRIANGLE



Use all three lenses. A personal explanation does not remove organisational responsibility.

01 Meaningful episode

M-07 delayed a gate recommendation long enough for an overlooked dependency to be heard.

02 Value and definition

Integrity means making uncertainty visible, including when a confident answer would be more popular.

03 Second value

Stewardship means using time and investment responsibly, not pursuing certainty without limit.

04 Current tension

A further review may protect evidence quality but delay the delivery team.

05 Chosen action

Explain the unresolved issue, the minimum evidence required and the bounded time for obtaining it.

06 Purpose in practice

Lead decisions people can trust and act on; test this through the next gate brief and its conditions.

Basis: H01 / R21 | Original executive application

X06

ACTIVITY

Stakeholder value interview

Gather direct, consented information about the contribution others need from the executive before setting the coaching agenda.

Practical guide

Working form

Worked example

EXCEL TAB X06 Stakeholder value interview

TIME 45 minutes preparation; three 15-minute interviews

BRING Agreed interview purpose and information boundary | A balanced shortlist of stakeholders | Permission to take minimal notes

RUN THE ACTIVITY

- 01** Agree with the coachee whether interviews are led by them or the coach. Explain that the exercise is developmental, not a hidden performance investigation.
- 02** Select people who see different parts of the work, including a less powerful voice. Do not promise anonymity when a small set or role detail makes identification likely.
- 03** Open each interview with the purpose, voluntary participation and intended use. Ask: what contribution matters most, where has it helped recently, and what would a useful difference look like?

CONTINUE THE METHOD

- 04** Probe for one concrete episode and the conditions around it. Ask what the stakeholder or system could do differently as well, so all responsibility is not placed on the executive.
- 05** Summarise back and confirm what may be shared. Keep disagreement and alternative explanations visible; do not turn three conversations into a representative survey.
- 06** Debrief patterns with the coachee, checking emotional readiness. Choose one hypothesis to test and thank contributors without disclosing anyone else's comments.

QUESTIONS TO OPEN THINKING

What do you need from this role that you are not consistently getting?

When has this already worked well?

What support from your side would make the difference easier?

BOUNDARY & CAUTION

Use authorised feedback routes for allegations, misconduct or employment decisions. Do not collect sensitive third-party information that is unnecessary for coaching.

BETWEEN SESSIONS / HAND-OFF

Conduct the agreed interviews, share only permitted summaries and note who was missing from the evidence.

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

BASIS H01 | Original executive application

X06 Stakeholder value interview

ACTIVITY

Gather direct, consented information about the contribution others need from the executive before setting the coaching agenda.

Guide

Worksheet

Example

LIVE WORKSHEET

STAKEHOLDER LISTENING CARDS

01

Ask for an episode

02

Listen without filling gaps

03

Check meaning



WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 Interview purpose

02 Participants and permissions

03 Core questions

04 Pattern found

05 Alternative explanation

06 Next experiment

Basis: H01 | Original executive application

X06 Stakeholder value interview

ACTIVITY

Gather direct, consented information about the contribution others need from the executive before setting the coaching agenda.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

STAKEHOLDER LISTENING CARDS

01

Ask for an episode

What mattered?

02

Listen without filling gaps

What happened?

03

Check meaning

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 Interview purpose

Explore how M-07 can make cross-functional gate decisions clearer.

02 Participants and permissions

Engineering lead, commercial peer and delivery coordinator; named, consented summaries rather than promised anonymity.

03 Core questions

What contribution matters? Give one recent example. What difference would help? What can the system or you contribute?

04 Pattern found

All three want the decision question earlier; only one reports insufficient discussion time.

05 Alternative explanation

Late evidence may be limiting discussion, rather than M-07 deliberately excluding challenge.

06 Next experiment

Send the question and known gaps two days before the next meeting; ask each stakeholder whether preparation became easier.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X07

ACTIVITY

Twelve-month future story

Explore a plausible desired future and work backwards to the leadership practices and conditions it would require.

Practical guide

Working form

Worked example

EXCEL TAB X07 Twelvemonth future story

TIME 45 minutes

BRING Current mandate | One-year horizon appropriate to the role | Permission to explore possibilities without committing the sponsor

RUN THE ACTIVITY

- 01** Invite the coachee to describe an ordinary working day twelve months from now in which the development has been useful. Avoid an idealised world with no constraints.
- 02** Ask what colleagues would notice in a meeting, a decision and a handover. Turn adjectives such as strategic into visible actions and consequences.
- 03** Identify what stayed difficult in this future. Include unresolved trade-offs, resource limits and stakeholder differences so the story remains credible.

CONTINUE THE METHOD

- 04** Work backwards to the capability, relationships and operating conditions that would support it. Separate what the executive can practise from what requires a collective decision.
- 05** Select a small signal that could appear within a month. Treat it as an experiment, not proof that the entire future has been secured.
- 06** Write a short future story and a first move. Agree when to revise the story in light of evidence rather than defending it as a promise.

QUESTIONS TO OPEN THINKING

What would an ordinary Tuesday look like?

What would still be difficult?

What is the smallest credible sign that this future is becoming possible?

BOUNDARY & CAUTION

Do not present visualisation as a causal mechanism guaranteeing success or replace practical preparation with positive imagery.

BETWEEN SESSIONS / HAND-OFF

Read the story before one relevant meeting; afterwards mark which part was observable and which remains an assumption.

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

BASIS H01 | Original executive application

X07 Twelve-month future story

ACTIVITY

Explore a plausible desired future and work backwards to the leadership practices and conditions it would require.

Guide

Worksheet

Example

LIVE WORKSHEET

FUTURE-SCENE STORYBOARD

01 Future scene	→	02 Behaviour people notice	→	03 Difficulty that remains
---	---	--	---	--

NOW **NEXT USEFUL SIGNAL** **FUTURE**

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

01 Future scene

02 Observable leadership

03 Continuing difficulty

04 Required conditions

05 Near-term signal

06 First move

Basis: H01 | Original executive application

X07 Twelve-month future story

ACTIVITY

Explore a plausible desired future and work backwards to the leadership practices and conditions it would require.

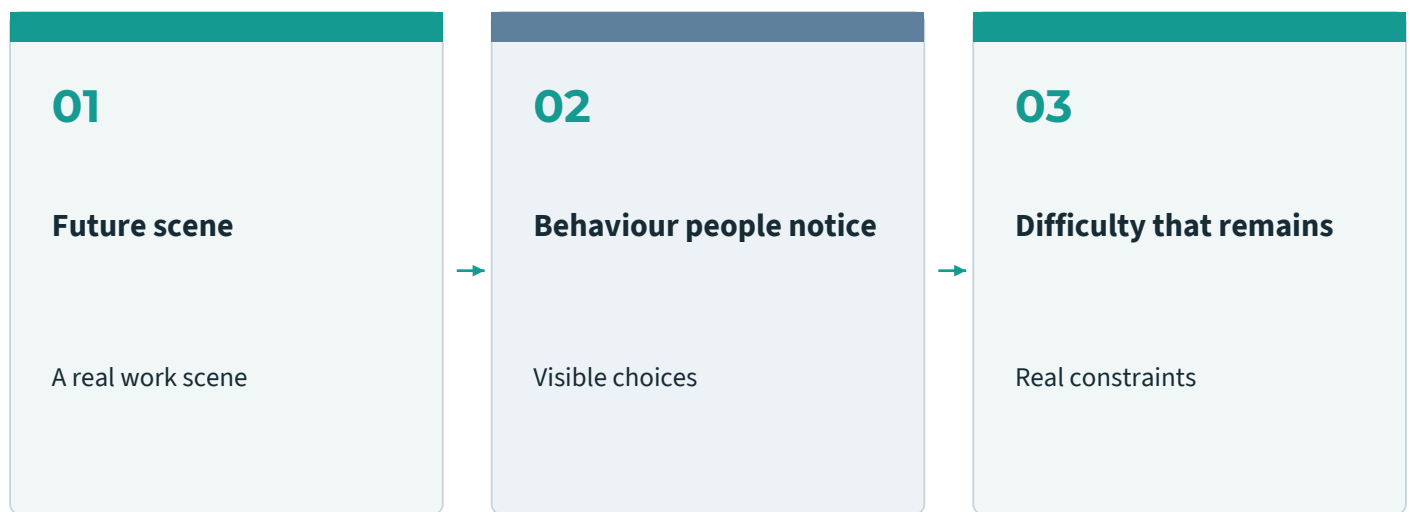
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

FUTURE-SCENE STORYBOARD



NOW

NEXT USEFUL SIGNAL

FUTURE

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

01 Future scene

A gate review ends with a clear conditional decision and no surprise objection arriving afterwards.

03 Continuing difficulty

Supplier information is still uncertain and some decisions remain uncomfortable.

05 Near-term signal

At the next two meetings, stakeholders can state the decision question before discussion begins.

02 Observable leadership

M-07 invites disconfirming evidence, states the trade-off and checks ownership before closing.

04 Required conditions

Evidence arrives earlier; specialists retain sign-off; sponsor accepts visible conditions rather than false certainty.

06 First move

Rewrite the opening brief with the engineering lead and test it at one review, then retain or revise it.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X08

ACTIVITY

Is coaching the right help?

Make a joint, non-stigmatising choice between coaching and other forms of support before an engagement becomes a default remedy.

Practical guide

Working form

Worked example

EXCEL TAB X08 Is coaching the right help

TIME 40 minutes

BRING Coachee's own development question | Sponsor's stated purpose | Available training, management, mentoring, operational and specialist routes

RUN THE ACTIVITY

- 01** Ask what the person wants help with and what led to the request. Distinguish their choice from the sponsor's wording and allow them to disagree with the proposed focus.
- 02** Explore whether the need concerns thinking and practice, missing knowledge, unclear authority, an unresolved formal issue or health and safety. Do not diagnose a person from the answer.
- 03** Compare coaching with instruction, mentoring, management action and system improvement. More than one route may be needed; make ownership explicit.

CONTINUE THE METHOD

- 04** Check whether participation can be meaningfully voluntary, whether time and suitable competence are available, and whether confidentiality can be explained honestly.
- 05** Agree proceed, proceed with conditions, defer or use another route. A refusal is not evidence of poor motivation; record only information needed for the decision.
- 06** Explain what will happen next, what the sponsor will hear and how the person can revisit the decision. Use a formal referral protocol where required.

QUESTIONS TO OPEN THINKING

What kind of help would be useful rather than simply familiar?

What would still block progress even with excellent coaching?

Are you free to say that this is not the right relationship?

BOUNDARY & CAUTION

Significant distress, risk of harm or needs outside competence require an appropriate qualified route. Coaching must not replace urgent help or formal duties.

BETWEEN SESSIONS / HAND-OFF

Write one sentence describing the support you have chosen and one condition that would lead you to pause or change it.

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

BASIS H01 / H04 / R01 | Original executive application

X08 Is coaching the right help?

ACTIVITY

Make a joint, non-stigmatising choice between coaching and other forms of support before an engagement becomes a default remedy.

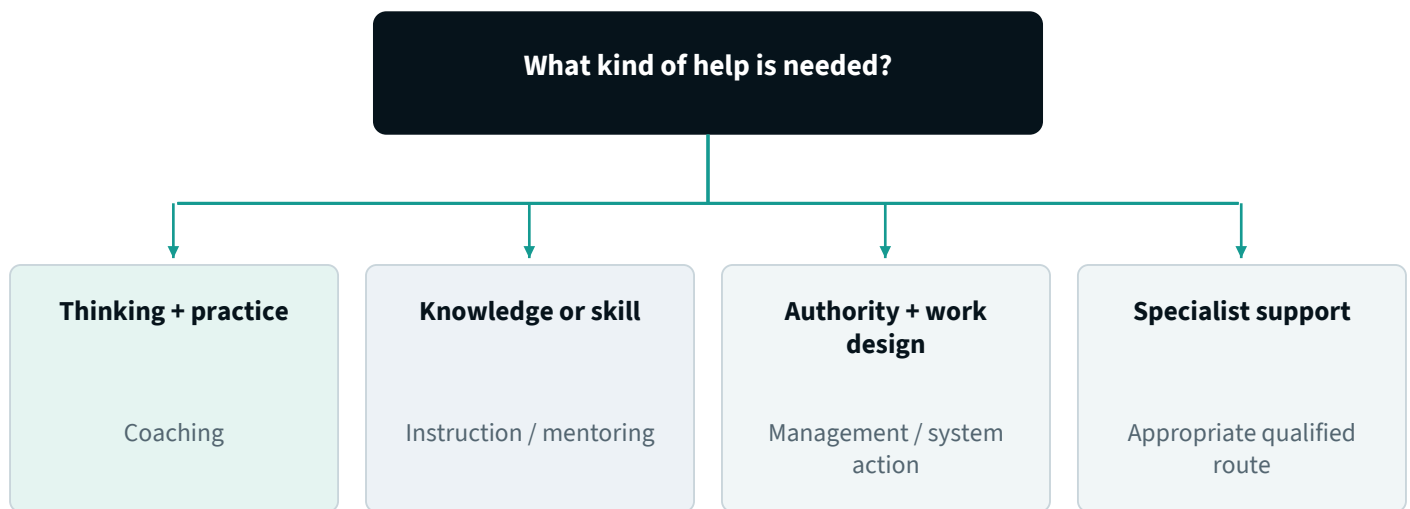
Guide

Worksheet

Example

LIVE WORKSHEET

SUPPORT-CHOICE DECISION TREE



PROCEED / PROCEED WITH CONDITIONS / DEFER / CHOOSE ANOTHER ROUTE

A joint judgement, not an automated triage or diagnosis. More than one route may be needed.

01 Question

02 Coachable element

03 Non-coaching element

04 Alternative support

05 Fit decision

06 Next communication

X08 Is coaching the right help?

ACTIVITY

Make a joint, non-stigmatising choice between coaching and other forms of support before an engagement becomes a default remedy.

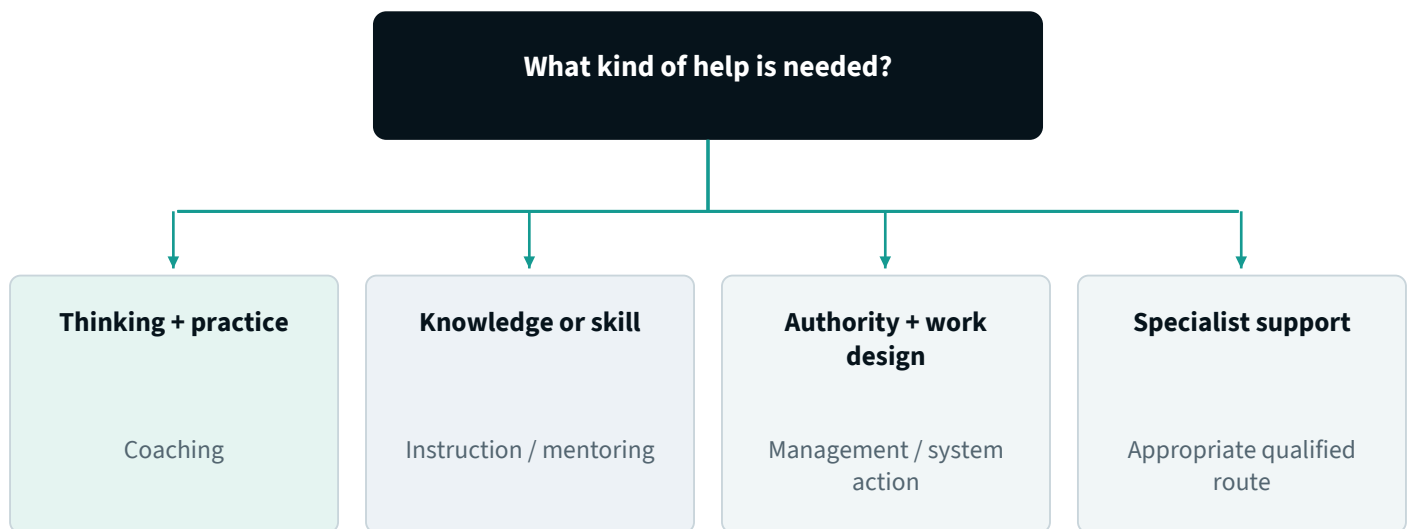
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

SUPPORT-CHOICE DECISION TREE



PROCEED / PROCEED WITH CONDITIONS / DEFER / CHOOSE ANOTHER ROUTE

A joint judgement, not an automated triage or diagnosis. More than one route may be needed.

01 Question

M-07 wants to stop taking over specialists' recommendations during deadline pressure.

03 Non-coaching element

The sponsor has not clarified who can approve a late change in scope.

05 Fit decision

Proceed for six sessions if M-07 freely agrees and the sponsor accepts the information boundary.

02 Coachable element

Explore judgement about when to inquire, support or intervene and practise a clearer delegation agreement.

04 Alternative support

A short governance clarification is required alongside coaching; no clinical or technical treatment is proposed.

06 Next communication

Share the purpose, duration and required governance action, not private reasons or session notes.



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.

S07

Six-session executive transition pathway

6 x 60 minutes

Run sheet 094 / Annotated dialogue 095

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.



Six-session executive transition pathway

Sequence a bounded engagement around a real role transition, adapting the plan when evidence or purpose changes.

Time	Focus	Coach action
Session 1 / 60	Align and Agree	Role mandate, fit, four-way agreement and a provisional goal.
Session 2 / 60	Assess	Episodes, context, baseline and proportionate assessment only where needed.
Session 3 / 60	Activate	Explore assumptions and rehearse one leadership decision or conversation.
Session 4 / 60	Apply	Review the first experiment and refine support, authority and practice.
Session 5 / 60	Apply and Assure	Test transfer across a second context and examine evidence and unintended effects.
Session 6 / 60	Assure and close	Review goal anchors, contribution, maintenance, sponsor summary and record lifecycle.

BETWEEN-SESSION ASSIGNMENT

Assign at most one substantial between-session activity at a time. Allow two to four weeks between sessions when work opportunities require it. This is an example pathway, not a claim about an optimal coaching dose.

PREPARATION & LIMIT

Tool route: 6A framework; X01-X03, X14, X21, X30, X45-X46, X55-X56, X64-X72. Programme design must reflect actual needs and risk. A transition may require instruction, mentoring, team work or system change in parallel.



Six-session executive transition pathway

Sequence a bounded engagement around a real role transition, adapting the plan when evidence or purpose changes.

Speaker / coaching purpose	Illustrative dialogue
Session 1 prompt / Use X01 and X03; do not assume promotion means the same transition for everyone.	What must your new role contribute that your old role did not?
Session 2 prompt / Use X21 and X30; an assessment is optional, not automatic.	What evidence supports the current account, and what could contradict it?
Session 3 prompt / Use X45 or X46 and rehearse one adjustment.	What would you say or do at the difficult moment?
Session 4 prompt / Use X55 or X56; retain failed predictions.	What happened in work, and what did the conditions allow?
Session 5 prompt / Use X64 and X65; do not overgeneralise from one success.	Does the practice help in another appropriate situation?
Session 6 prompt / Use X69-X72 and close explicitly.	What can you now carry independently, and what remains owned elsewhere?
Adaptation decision / The sequence is not a rigid waterfall.	If authority remains unclear, pause the experiment and seek the proper organisational decision.
Sponsor review / The four-way information agreement governs every review.	Discuss agreed goals, practice and support, not private session content.

DEBRIEF AND NEXT DECISION

At each session, check fit, consent, evidence and opportunity. Continue, adapt, pause, rematch or stop where appropriate. Six sessions do not certify competence or guarantee a business outcome.



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.

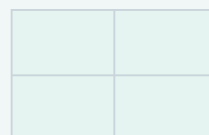
CHOOSE THE VISUAL WORKING SURFACE



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.



SOURCE CONTINUITY

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.**
Licensed resource pointer
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.



WORKING GLOSSARY

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.



WORKING GLOSSARY

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.



ALIGN / MASTER REFERENCE ARCHIVE

The complete-manual opening, retained.

Original cover, foreword, contents, full tool index and complete session-library overview.

This archive preserves source pages that belong to the whole manual rather than to one coaching stage. Keeping them here ensures that every original page has a home within the six-guide suite. They are not additional Align activities.

001

Original cover

Guide page 122

005

Original whole-toolkit foreword

Guide page 123

006

Original whole-toolkit contents

Guide page 124

007

Original master tool index

Guide page 125

573

Complete session-designs divider

Guide page 138

574

Original eight-session index

Guide page 139

READING ORIGINAL PAGE REFERENCES

Index numbers on these archived pages refer to the 606-page master. Their links have been redirected to the corresponding guide and page. Use the new front index for local Align page numbers.



HR DELIVERY
Making Sure HR Delivers

HR DELIVERY / PRACTITIONER TOOLKIT

Executive coaching

A practical 6A framework for purposeful relationships, skilled dialogue and learning that changes work.



PURPOSE / INSIGHT / CHOICE / PRACTICE / EVIDENCE

160 tools and activities | One connected working toolkit

VISUAL PRACTICE EDITION / REBUILT FROM THE ORIGINAL / OCTOBER 2026

Help people think. Help learning travel.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

Foreword text prepared for review and approval

The work after the conversation

An executive can leave a coaching session with a useful insight and return to a working environment that makes it difficult to act on it. The quality of the conversation matters enormously. So do the agreement around it, the opportunity to practise and the evidence that helps the person learn from what happens next.

A relationship with purpose

This toolkit connects those responsibilities. HR Delivery's 6A system begins with a worthwhile purpose and a clear agreement. It builds a proportionate understanding of the person in their role, creates space for thoughtful choice and follows learning into work. Assurance runs throughout, protecting both the relationship and the decisions made about its value.

Tools should serve the person

A good coach does not need to use every exercise in this manual. They need to listen carefully, choose thoughtfully and know when a tool is not the right response. A worksheet should help someone see a choice more clearly, practise a difficult moment or make a practical commitment. It should not become a test of whether they are pleasing the coach.

Keep the distinctions visible

Preference is not competence. Confidence is not evidence of performance. A warm relationship is not proof of business impact. These distinctions are not obstacles to good coaching; they help us make the work more trustworthy. They also remind organisations that people need authority, time, support and fair access if development is to travel into everyday practice.

An invitation to practise

Use the examples to understand the method, then bring your own question and evidence. Rehearse before a consequential conversation, seek feedback and revise an assumption when the work tells you something different. My hope is that this toolkit helps coaches and executives build relationships that are humane, useful and capable of making a difference beyond the session.

Approval is required before publication under his name.



Find the stage. Open the tool.

Each page reference and section card is linked. The master tool index begins immediately after this page.

01 ALIGN

Charter + value hypothesis

26 tools / activities

[027 >](#)

02 AGREE

Four-way contract

19 tools / activities

[110 >](#)

03 ASSESS

Goal + baseline + formulation

28 tools / activities

[174 >](#)

04 ACTIVATE

Insight + options + commitment

38 tools / activities

[290 >](#)

05 APPLY

Experiments + transfer plan

24 tools / activities

[410 >](#)

06 ASSURE

Quality + value decision

25 tools / activities

[487 >](#)

Master tool index	007
Assessment-to-coaching companion	179
Complete session designs	573
Ebook and source crosswalk	591
Sources and practice notes	593
Edition and responsible use	606



Align: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T01	Strategic coaching charter	32	33	34
T02	Strategy-to-behaviour chain	35	36	37
T03	Intervention fit test	38	39	40
T04	Coaching portfolio map	41	42	43
T05	Stakeholder and power map	44	45	46
T06	Business case canvas	47	48	49
T07	Eligibility and equity matrix	50	51	52
T08	Coaching mode decision matrix	53	54	55
T09	Programme theory of change	56	57	58
T10	Coaching risk register	59	60	61
T11	Governance RACI	62	63	64
T12	Programme readiness gate	65	66	67
T75	Service blueprint and participant journey	68	69	70

BEFORE YOU MOVE ON

Is coaching the right response? Complete or revisit: Charter + value hypothesis.



Align: tools to use

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

ID	Tool / activity	Guide	Form	Example
T76	Coach capability framework	71	72	73
T81	Provider RFP and due-diligence scorecard	74	75	76
T82	Implementation workplan and milestone tracker	77	78	79
T83	Communications and stakeholder plan	80	81	82
T84	Capacity, budget and demand model	83	84	85
X01	Executive role mandate	86	87	88
X02	Leadership impact compass	89	90	91
X03	Role-transition bridge	92	93	94
X04	Priority and opportunity-cost review	95	96	97
X05	Purpose, values and leadership choices	98	99	100
X06	Stakeholder value interview	101	102	103
X07	Twelve-month future story	104	105	106
X08	Is coaching the right help?	107	108	109

BEFORE YOU MOVE ON

Is coaching the right response? Complete or revisit: Charter + value hypothesis.



Agree: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T13	Four-way contracting canvas	115	116	117
T14	Coachee agreement	120	121	122
T15	Sponsor briefing guide	123	124	125
T16	Confidentiality information protocol	126	127	128
T17	Role-conflict declaration	129	130	131
T18	Session working agreement	132	133	134
T19	Data processing map	135	136	137
T20	Referral and escalation protocol	138	139	140
T21	Rematch and termination guide	141	142	143
T22	Team coaching contract	144	145	146

BEFORE YOU MOVE ON

Are rights and boundaries clear? Complete or revisit: Four-way contract.



Agree: tools to use

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

ID	Tool / activity	Guide	Form	Example
T23	Digital and AI consent notice	147	148	149
T24	Contract quality audit	150	151	152
T78	Matching, chemistry and rematch protocol	153	154	155
X09	Chemistry conversation from the coachee's chair	156	157	158
X10	Negotiate a shared coaching goal	159	160	161
X11	Confidentiality boundaries rehearsal	162	163	164
X12	Feedback and challenge agreement	165	166	167
X13	Participation, agency and expectations	168	169	170
X14	Session preparation and private learning record	171	172	173

BEFORE YOU MOVE ON

Are rights and boundaries clear? Complete or revisit: Four-way contract.



Assess: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T25	Readiness and expectations check	206	207	208
T26	Person-role-system scan	209	210	211
T27	Strengths evidence map	212	213	214
T28	Critical moments analysis	215	216	217
T29	Stakeholder perspective plan	218	219	220
T30	Psychometric use check	221	222	223
T31	Goal architecture canvas	224	225	226
T32	Baseline evidence record	227	228	229
T33	Goal attainment scale	230	231	232
T34	Barrier and leverage map	233	234	235
T35	Learning preference and access profile	236	237	238
T36	Coaching formulation	239	240	241
X15	Leadership lifeline	242	243	244
X16	Best-work episode review	245	246	247

BEFORE YOU MOVE ON

Is evidence sufficient and contextual? Complete or revisit: Goal + baseline + formulation.



Assess: tools to use

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

ID	Tool / activity	Guide	Form	Example
X17	Strengths dosage: underuse and overuse	248	249	250
X18	Values trade-off cards	251	252	253
X19	Energy and attention diary	254	255	256
X20	Calendar versus contribution audit	257	258	259
X21	Critical decision reconstruction	260	261	262
X22	Stakeholder perception interviews	263	264	265
X23	Leadership 360 debrief	266	267	268
X24	Assessment-to-experiment bridge	269	270	271
X25	Relationship system map	272	273	274
X26	Delegation bottleneck review	275	276	277
X27	Assumptions and contrary evidence	278	279	280
X28	Control, influence and system action	281	282	283
X29	Leadership context wheel	284	285	286
X30	Integrated coaching formulation	287	288	289

BEFORE YOU MOVE ON

Is evidence sufficient and contextual? Complete or revisit: Goal + baseline + formulation.



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.



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.



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.



Apply: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T51	Workplace experiment canvas	415	416	417
T52	Implementation intention	418	419	420
T53	Stakeholder support agreement	421	422	423
T54	Manager transfer conversation	424	425	426
T55	After-action review	427	428	429
T56	Habit and environment design	430	431	432
T57	Relapse and pressure plan	433	434	435
T58	90-day transfer plan	436	437	438
T59	Learning journal	439	440	441
T60	Closure and sustainment plan	442	443	444
X55	Fourteen-day delegation experiment	445	446	447
X56	A new decision-meeting routine	448	449	450

BEFORE YOU MOVE ON

Is behaviour changing in work? Complete or revisit: Experiments + transfer plan.



Apply: tools to use

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

ID	Tool / activity	Guide	Form	Example
X57	Strategic calendar sprint	451	452	453
X58	Stakeholder listening tour	454	455	456
X59	Reciprocal network development	457	458	459
X60	Habit cues and friction	460	461	462
X61	WOOP work experiment	463	464	465
X62	Role-crafting proposal	466	467	468
X63	Confidence through work evidence	469	470	471
X64	Targeted behavioural feedback pulse	472	473	474
X65	Prospective decision journal	475	476	477
X66	Learning-partner check-in	478	479	480
X67	After-action review of a difficult conversation	481	482	483
X68	Setback and restart plan	484	485	486

BEFORE YOU MOVE ON

Is behaviour changing in work? Complete or revisit: Experiments + transfer plan.



Assure: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T61	Coaching dashboard specification	492	493	494
T62	Experience and alliance pulse	495	496	497
T63	Goal progress review	500	501	502
T64	Behavioural evidence interview	503	504	505
T65	Contribution analysis	506	507	508
T66	Cost-consequence analysis	509	510	511
T67	Responsible ROI estimator	512	513	514
T68	Coach quality scorecard	515	516	517
T69	Supervision record	518	519	520
T70	Ethical decision record	521	522	523
T71	Incident and complaint pathway	524	525	526
T72	AI coaching assurance checklist	527	528	529
T73	Quarterly portfolio review	530	531	532

BEFORE YOU MOVE ON

What should scale, adapt or stop? Complete or revisit: Quality + value decision.



Assure: tools to use

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

ID	Tool / activity	Guide	Form	Example
T74	Maturity assessment	533	534	535
T77	Coach selection and observed-practice rubric	540	541	542
T79	Supervision standard and cadence	543	544	545
T80	Coach authorisation, CPD and caseload record	546	547	548
T85	Evaluation design and data-collection matrix	549	550	551
T86	Aggregate themes and organisational action log	552	553	554
T87	Quality-assurance sampling plan	555	556	557
T88	Supplier/platform continuity and exit plan	558	559	560
X69	Anchored goal-attainment review	561	562	563
X70	Learning and contribution story	564	565	566
X71	Six-month maintenance and self-coaching plan	567	568	569
X72	Closure conversation and future letter	570	571	572

BEFORE YOU MOVE ON

What should scale, adapt or stop? Complete or revisit: Quality + value decision.



Complete session designs

Eight practical routes from first contact to workplace application and closure.

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



A route through the conversation.

Use these as adaptable plans. Check purpose, consent and the work context before selecting a script.

ID	Session / pathway	Planned time	Page
S01	First executive coaching session	90 min	575
S02	Assessment and 360 debrief session	75 min	577
S03	Strategic decision coaching	60 min	579
S04	Delegation and ownership session	60 min	581
S05	Difficult conversation session	60 min	583
S06	Pressure, assumptions and restart session	60 min	585
S07	Six-session executive transition pathway	360 min	587
S08	Midpoint review and closure design	90 min	589

S07 is a six-session pathway totalling 360 planned minutes, not one session. Timings are planning guides, not evidence of an optimal coaching dose. Use one significant assignment at a time and adapt or stop when the method no longer fits.



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.