



HR DELIVERY
Making Sure HR Delivers

EXECUTIVE COACHING / GUIDE 06 OF 06

Assure

Framework & toolkit

Review evidence, protect professional quality and close or renew coaching with a clear account of value.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

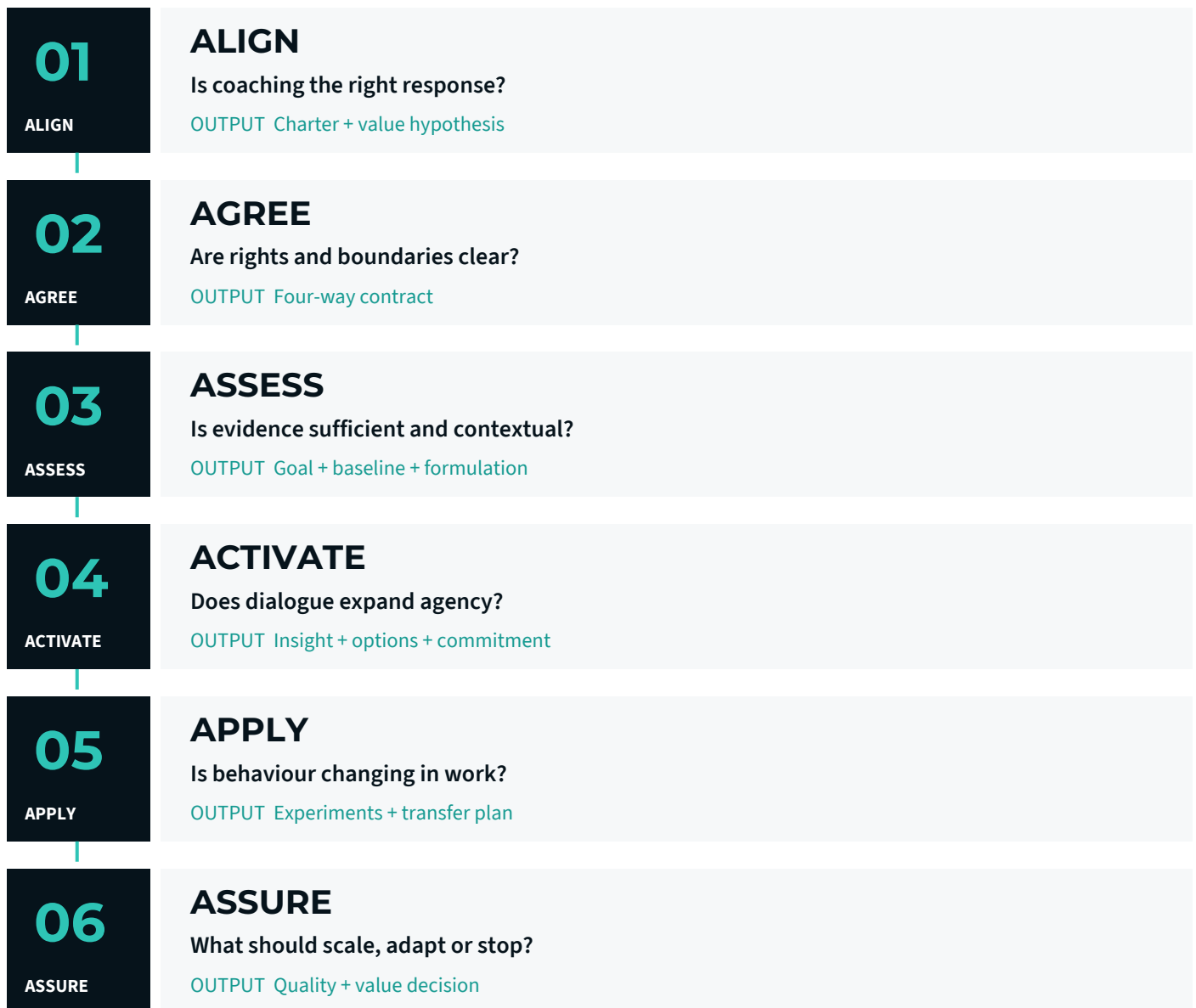
06 Assure

25 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

ASSURE / INTRODUCTION

Review honestly. Decide responsibly.

What this guide is for

Assure brings together the complete assurance, evaluation and closure section of the Visual Practice Edition. It includes engagement reviews, programme and practitioner tools, the source experience pulse and maturity guidance, and X69-X72 activities for goal review, contribution, maintenance and endings. Assurance remains a responsibility throughout all six A stages.

Choose evidence for the decision

Bring the agreed goals, baseline, practice records, relevant feedback and the information-sharing agreement. Distinguish access, participation, experience, learning, application and work outcomes. Use only what the decision requires. A positive experience is not proof of changed capability or organisational impact.

Keep the claim proportionate

Review goals against their defined anchors and retain changes in purpose or context. Explain what coaching may have contributed and what else changed. Include incomplete evidence, unsuccessful attempts and concerns. The source calculations and local review aids retain their limits; they do not become validated psychological scales through aggregation.

Assure the professional system

Use the practitioner observation, supervision, concerns, provider and technology materials within the appropriate responsibilities. The source maturity rubric remains dimension-specific. Do not allow a favourable overall impression to override an unresolved ethical, information or complaints issue.

Close without dependency

The visual maintenance plan and future-letter activity help identify practices to retain, signs of drift and appropriate support. The complete midpoint-and-closure session follows the tools. Agree what ends, what remains owned elsewhere, what the sponsor may receive and how records will be handled under the verified agreement.

Make the next decision explicit

Use the Assure gate: what should scale, adapt or stop? Leave with a quality and value decision, its evidence and its limits. A further coaching engagement should have a defined purpose. Use Align again when that purpose or the organisational context changes, rather than treating continuation as the default.

THE ASSURE DECISION

What should scale, adapt or stop? Minimum output: Quality + value decision.

Based on the main manual: Assure practitioner brief and operating route, master pp. 490-491.

A FOREWORD PREPARED FOR DR PHILLIP WELSH

A useful ending is an honest one.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

A foreword for the Assure guide

Review what matters

Coaching deserves more than a closing satisfaction question, but it does not need an inflated claim of value. A useful review asks what the executive learned, what changed in work, what remained difficult and what the evidence can reasonably support. It also asks whether the relationship and the service were conducted responsibly.

Keep different evidence visible

Experience, application and contribution answer different questions. The executive may value the relationship while a work opportunity remains unavailable. A practice may improve while other operational changes also matter. Those distinctions help the sponsor and participant make a better decision about what to retain, adapt or stop.

Protect the quality of practice

Assurance is not confined to the final session. Supervision, competence, information boundaries and a usable concerns route support the whole journey. The tools in this guide make those responsibilities visible at engagement and programme level. Use them to examine the work, not to construct a favourable average that hides an important problem.

End with independence and clarity

My hope is that coaches use the closure materials with care and candour. Acknowledge useful learning as well as unfinished work. Agree the permitted summary, the handling of records and the support the executive can use independently. Where further coaching is justified, give it a new purpose. A well-made ending leaves the person with clearer choices rather than a need to keep the relationship going.

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



CONTENTS / THIS GUIDE

Find your way through Assure.

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

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GUIDE / WORKSHEET / EXAMPLE

The original 25 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 Assure gate: What should scale, adapt or stop? 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
T61	Coaching dashboard specification	015	016	017
T62	Experience and alliance pulse	018	019	020
T63	Goal progress review	023	024	025
T64	Behavioural evidence interview	026	027	028
T65	Contribution analysis	029	030	031
T66	Cost-consequence analysis	032	033	034
T67	Responsible ROI estimator	035	036	037
T68	Coach quality scorecard	038	039	040
T69	Supervision record	041	042	043
T70	Ethical decision record	044	045	046
T71	Incident and complaint pathway	047	048	049
T72	AI coaching assurance checklist	050	051	052
T73	Quarterly portfolio review	053	054	055

THE ASSURE DECISION

What should scale, adapt or stop? Minimum output: Quality + value decision.



Open the guide. Use the worksheet.

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

ID	Tool / activity	Guide	Sheet	Example
T74	Maturity assessment	056	057	058
T77	Coach selection and observed-practice rubric	063	064	065
T79	Supervision standard and cadence	066	067	068
T80	Coach authorisation, CPD and caseload record	069	070	071
T85	Evaluation design and data-collection matrix	072	073	074
T86	Aggregate themes and organisational action log	075	076	077
T87	Quality-assurance sampling plan	078	079	080
T88	Supplier/platform continuity and exit plan	081	082	083
X69	Anchored goal-attainment review	084	085	086
X70	Learning and contribution story	087	088	089
X71	Six-month maintenance and self-coaching plan	090	091	092
X72	Closure conversation and future letter	093	094	095

THE ASSURE DECISION

What should scale, adapt or stop? Minimum output: Quality + value decision.



THE 6A WORKPLACE COACHING SYSTEM

06

Assure

Protect quality; make a credible value decision

THE GATE

What should scale, adapt or stop?

MINIMUM OUTPUT

Quality + value decision

25 TOOLS & ACTIVITIES

[Open the stage tool directory >](#)



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSURE / TOOL DIRECTORY

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.

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



01 Align

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ASSURE / TOOL DIRECTORY

Assure: tools to use

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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.

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



ASSURE / THE PRACTITIONER BRIEF

Protect quality; make a credible value decision

Assure operates throughout the journey and becomes explicit at review and closure. It protects ethics, competence, information and the coachee's agency, while examining what was useful and applied. A favourable satisfaction score cannot compensate for a serious boundary failure or establish organisational impact. [H01-H04]

Review several kinds of evidence

Distinguish access and participation, relationship experience, learning, application and work outcomes. Choose measures for a decision rather than collecting everything. Keep evidence from different levels and sources visible instead of collapsing it into a single coaching score.

Use goal anchors honestly

Review a goal against its predefined behavioural anchors and context. Mark insufficient evidence where necessary. Do not import clinical norms or compare people through unlike goals. A goal may be revised legitimately, but the original and the reason for revision must remain visible.

Make a contribution claim

Explain what coaching may have helped and what else changed. Include unsupported links, unsuccessful attempts, system barriers and adverse effects. Cost-consequence reporting is often more useful than an invented return on investment. Sensitivity calculations are scenarios, not causal estimates.

Supervise and improve practice

Coach supervision, observed practice, concerns handling and supplier assurance are not optional decorations. Use de-identified material and the appropriate authority. A toolkit does not grant competence, professional accreditation or permission to use a proprietary instrument.

Close without creating dependency

Review what the coachee can now carry independently, what remains owned elsewhere and what further help is appropriate. Agree the sponsor summary and the record lifecycle. A future engagement should have a new purpose rather than continue because ending feels uncomfortable.

Govern the programme as well as the engagement

At programme level, review access, quality, application, risk and evidence before scaling. Use T74's selected source rubric dimension by dimension; do not combine competing maturity conventions. Serious ethics, privacy or complaint gaps require action regardless of positive averages.



01 Align

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ASSURE / OPERATING ROUTE

Choose the next useful move.

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

01

Review the engagement

T61-T66, X69, X70 / Experience, goals and contribution

02

Protect professional quality

T68-T71, T77, T79, T80 / Observation, supervision and concerns

03

Assure technology and provision

T72, T81, T87, T88 / AI, provider quality and continuity

04

Decide programme direction

T73, T74, T85, T86 / Portfolio, maturity and evidence

05

Close and sustain

X71, X72 / Independence, records and future support

GATE REVIEW

What should scale, adapt or stop? 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
T61

TOOL

Coaching dashboard specification

Define useful programme evidence without capturing session content.

Practical guide

Working form

Worked example

EXCEL TAB T61 Coaching dashboard specific

TIME 90-120 minute design workshop; specialist sign-off before build | OWNER Evaluation lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Start with each governance decision the dashboard must inform.
- 02** Define indicators, denominators, sources, owners and refresh frequency.
- 03** Set privacy-safe breakdowns, suppression rules and missing-data treatment.

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

Starting with available metrics instead of the decision question; Averaging results until poor alliance, harm or inequity disappears; Publishing indicators without definitions, thresholds or accountable responses.

CONTINUE THE METHOD

- 04** Attach thresholds and fix, adapt, scale, pause or stop responses.
- 05** Prototype with decision users and remove any metric that changes no decision.

BOUNDARY & CAUTION

The dashboard must never expose individual session content or unsafe small-group results merely because data are available.

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.238



01 Align

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05 Apply

06 Assure

T61

TOOL

Coaching dashboard specification

Define useful programme evidence without capturing session content.

Practical guide

Working form

Worked example

EXCEL TAB T61 Coaching dashboard specific

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

KPI / decision	Definition / formula	Population / source	Cadence / owner	Threshold	Current / trend	Action

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



01 Align

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T61

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Coaching dashboard specification

Define useful programme evidence without capturing session content.

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Worked example

EXCEL TAB T61 Coaching dashboard specific

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Question Decision the dashboard supports	Are participants applying agreed behaviours safely and usefully in real project decisions?
Indicator Definition and formula	Participants evidencing application in two work moments, divided by participants reaching midpoint.
Source System or respondent	Coachee-approved application log and behaviour-only observer checklist; no session content collected.
Frequency Collection/reporting cadence	Monthly operational update, quarterly decision review and immediate escalation for protected concerns.
Breakdown Safe population cuts	Portfolio and pathway where groups exceed privacy threshold; access barriers reported separately.

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

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T62

TOOL

Experience and alliance pulse

Detect contracting, fit and usefulness issues early.

Practical guide

Working form

Worked example

EXCEL TAB T62 Experience and alliance pul

TIME 3-5 minutes; 15-30 minutes for repair if needed | OWNER Programme owner

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Brief participants on purpose, response access and available repair routes.
- 02** Collect clarity, safety, fit, challenge and relevance with optional comment.
- 03** Review item distributions and flag any low score without relying on averages.

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

Relying on the overall average while ignoring any 1-2 rating; Promising anonymity that a small cohort cannot genuinely provide; Sharing identifiable responses outside the agreed repair and concern routes.

CONTINUE THE METHOD

- 04** Offer coach-led repair, no-fault rematch or an independent concern route.
- 05** Track protected patterns, action taken and whether the experience improves.

BOUNDARY & CAUTION

The pulse is a quality signal, not a performance rating or guarantee of anonymity in a small cohort.

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

Eight source statements retained. Single-choice responses and stable IDs added. The source's five-label example is replaced by an original eight-item fictional example; no composite psychological score is created.

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

BASIS H01 / H04 | H04 source p.241



01 Align

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T62

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Experience and alliance pulse

Detect contracting, fit and usefulness issues early.

Practical guide

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Worked example

EXCEL TAB T62 Experience and alliance pul

Choose one response per item: 1 strongly disagree; 2 disagree; 3 neither; 4 agree; 5 strongly agree; N/A not applicable. Blank means missing. No overall psychological score.

Stable ID / statement	Response 1-5 or N/A	Optional evidence / comment
E01 I understood the purpose and information boundaries.		
E02 I could raise what mattered to me.		
E03 The coach and I agreed what useful work involved.		
E04 The coach helped me see the issue differently.		
E05 I retained ownership of decisions and action.		
E06 Coaching connected to meaningful work.		
E07 I tested relevant action between sessions.		
E08 I know how to raise a concern or request a rematch.		

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

01 Align

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T62

TOOL

Experience and alliance pulse

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Practical guide

Working form

Worked example

EXCEL TAB T62 Experience and alliance pul

NEW FICTIONAL EXECUTIVE EPISODE

Record / prompt	Illustrative entry
E01 I understood the purpose and information boundaries.	4 - Purpose was clear; M-07 asked for one example of sponsor reporting.
E02 I could raise what mattered to me.	4 - Relevant work could be raised without compulsory personal disclosure.
E03 The coach and I agreed what useful work involved.	3 - The goal was revised after a system barrier became clearer.
E04 The coach helped me see the issue differently.	4 - A different interpretation of late evidence was explored.
E05 I retained ownership of decisions and action.	5 - The coachee chose and adapted the experiment.
E06 Coaching connected to meaningful work.	4 - The practice concerned actual gate decisions.
E07 I tested relevant action between sessions.	3 - One practice was delayed by travel and workload.
E08 I know how to raise a concern or request a rematch.	4 - The no-fault rematch route was understood.

WHAT THE COACH SHOULD NOTICE

The example keeps the work situation, evidence, interpretation and next action distinct. Its conclusion is provisional. The coachee owns the choice; other people retain their authority and the right to a different view.

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.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

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T62 / PARTICIPANT VERSION

Your coaching experience

Eight retained source statements in a fixed mixed order. Use the stable IDs when recording responses.

For this engagement and review period: 1 strongly disagree; 2 disagree; 3 neither agree nor disagree; 4 agree; 5 strongly agree; N/A not applicable. Leave blank only when unanswered. Choose one response. This is developmental service feedback, not a validated psychological scale.

ID	Statement	One response	Optional comment
E05	I retained ownership of decisions and action.		
E02	I could raise what mattered to me.		
E08	I know how to raise a concern or request a rematch.		
E04	The coach helped me see the issue differently.		
E01	I understood the purpose and information boundaries.		
E07	I tested relevant action between sessions.		
E03	The coach and I agreed what useful work involved.		
E06	Coaching connected to meaningful work.		

BASIS H04 T62 | Statement wording retained; order and response layout adapted

T62 / ANALYSIS AND INTERPRETATION

Read the pattern. Do not invent a verdict.

The eight statements concern experience and practice conditions. They are not interchangeable indicators of one validated latent trait.

Coding and coverage

Record E01-E08 in their stable order, irrespective of the participant version used. Valid numeric responses are 1-5. N/A is not applicable; a blank is missing. Neither is zero. Report the number of valid, N/A and missing responses. The workbook flags invalid values.

Individual interpretation

Show the item responses and the coachee's explanation. Do not create an overall alliance, readiness or psychological score. A response about concerns or autonomy may require a direct conversation even when the other items are positive.

Programme interpretation

Use an approved, privacy-protected collection process rather than combining private engagement workbooks. If a programme reports item percentages, use valid item responses as the denominator and state the count. Do not assume non-respondents had the same experience.

Illustrative arithmetic

If 12 people provide valid responses to one item and 9 select 4 or 5, the descriptive favourable proportion is $9/12 = 75\%$. If three other invitees did not answer, they are not included in that item denominator. State both response coverage and item counts. This is not a norm or success threshold.

Action before aggregation

Clarify confusing boundaries, address lack of opportunity and offer the concerns or rematch route where relevant. Do not use a favourable average to override a serious issue. Keep any formal complaint in the appropriate process.

Retest and learning

Use a review interval that matches the purpose. A changed response may reflect changed understanding or circumstances, not only improved coaching. Retain the wording, context and evidence and interpret change cautiously.

01 Align

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T63

TOOL

Goal progress review

Review progress using evidence and context, not impression alone.

Practical guide

Working form

Worked example

EXCEL TAB T63 Goal progress review

TIME 30-45 minutes at midpoint and closure | OWNER Coach + coachee

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Restate the goal, baseline and success scale without retrospective alteration.
- 02** Gather current behavioural evidence and the coachee's progress judgment.
- 03** Assign the agreed GAS level using its prewritten observable description.

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

Quietly changing the goal or scale after seeing weak progress; Applying goal-attainment ratings inconsistently across review points; Attributing every improvement to coaching despite material context changes.

CONTINUE THE METHOD

- 04** Examine context, support, unintended effects and credible alternative explanations.
- 05** Decide sustain, adapt, pause or close and set the next evidence point.

BOUNDARY & CAUTION

Goal progress is not proof of organisational impact or coaching causality and should be interpreted with contextual 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.244



01 Align

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T63

TOOL

Goal progress review

Review progress using evidence and context, not impression alone.

Practical guide

Working form

Worked example

EXCEL TAB T63 Goal progress review

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

Goal Defined goal	
Baseline Starting point	
Current Current evidence	
GAS -2 to +2 rating with rationale	
Context Other influences	
Learning What helped or hindered	
Decision Continue, adapt, close or refer	

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



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T63

TOOL

Goal progress review

Review progress using evidence and context, not impression alone.

Practical guide

Working form

Worked example

EXCEL TAB T63 Goal progress review

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal Defined goal	Use decision framing in three consecutive gates while maintaining constructive cross-functional participation.
Baseline Starting point	Criteria stated in one of five sampled gates; alternatives invited in none.
Current Current evidence	Full routine used in two of three gates; one urgent review omitted alternatives.
GAS -2 to +2 rating with rationale	+1: expected progress exceeded on clarity, with consistency under pressure still developing.
Context Other influences	Sponsor behaviour improved, while late commercial papers continue to restrict preparation 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.

01 Align

02 Agree

03 Assess

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05 Apply

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T64

TOOL

Behavioural evidence interview

Gather narrow stakeholder evidence with consent.

Practical guide

Working form

Worked example

EXCEL TAB T64 Behavioural evidence interv

TIME 30-45 minutes plus coding and quality review | OWNER Evaluator/coach as agreed

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Define one target behaviour and the interview's authorised evidence use.
- 02** Ask for a specific recent example, then establish context and role.
- 03** Probe what changed, what remained stable and what evidence supports it.

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

Leading the interviewee toward the programme's preferred success story; Substituting hearsay or trait labels for a specific behavioural example; Claiming sustainability from a single low-pressure instance of change.

CONTINUE THE METHOD

- 04** Test alternative explanations and seek a negative or contrasting case.
- 05** Assess sustainability cautiously, code consistently and protect identifying detail.

BOUNDARY & CAUTION

Do not interview without informed consent or use developmental evidence for selection, discipline or diagnosis.

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.247



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T64

TOOL

Behavioural evidence interview

Gather narrow stakeholder evidence with consent.

Practical guide

Working form

Worked example

EXCEL TAB T64 Behavioural evidence interv

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

Target behaviour What was agreed	
Example Specific observed situation	
Change Frequency, quality or impact	
Alternative Other factors affecting change	
Sustainability Likely under future pressure	
Support What the system should continue	

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T64

TOOL

Behavioural evidence interview

Gather narrow stakeholder evidence with consent.

Practical guide

Working form

Worked example

EXCEL TAB T64 Behavioural evidence interv

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Target behaviour What was agreed	Invite and test contrary evidence before summarising a preferred investment option.
Example Specific observed situation	At Riverside Depot, the director reopened mobilisation risk after the sponsor signalled preference.
Change Frequency, quality or impact	Challenge now occurs before recommendation in two of three observed capital-project gates.
Alternative Other factors affecting change	A revised agenda and clearer authority may explain part of the observed improvement.
Sustainability Likely under future pressure	The behaviour persisted across eight weeks but remains untested during an emergency decision.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
T65

TOOL

Contribution analysis

Judge how plausibly coaching contributed to observed outcomes.

Practical guide

Working form

Worked example

EXCEL TAB T65 Contribution analysis

TIME 2-4 hours after evidence preparation; independent challenge if high stakes | OWNER Evaluation lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Restate the programme theory from activity through mechanism to outcome.
- 02** Verify implementation quality, reach and material deviations before interpreting results.
- 03** Assemble evidence for observed results and each proposed mechanism.

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

Collecting only evidence that confirms the programme theory; Naming alternative explanations without investigating their plausibility; Converting a reasoned contribution judgment into a causal percentage.

CONTINUE THE METHOD

- 04** Investigate concurrent changes, rival explanations and negative cases.
- 05** Conclude contribution with confidence, limitations and the decision it informs.

BOUNDARY & CAUTION

Contribution analysis strengthens a reasoned explanation but cannot establish experimental causality or a precise attribution percentage.

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.250



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T65 Contribution analysis

TOOL

Judge how plausibly coaching contributed to observed outcomes.

Guide

Worksheet

Example

LIVE WORKSHEET

Theory Expected change chain



Implementation What was actually delivered



Mechanisms Evidence that intended mechanisms occurred

Observed results Evidence by level

Alternatives Other explanations

Context Events helping or hindering

Confidence Low/medium/high with reason

Decision Scale, adapt, test or stop



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T65 Contribution analysis

TOOL

Judge how plausibly coaching contributed to observed outcomes.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Theory Expected change chain

Coaching plus sponsor and workflow support improves framing, application and capital-decision quality.



Implementation What was actually delivered

Eleven started, ten reached midpoint; coaching quality met gates, one access adjustment was late.



Mechanisms Evidence that intended mechanisms occurred

Reflection, rehearsal, implementation intentions and protected work opportunities were reported as useful.

Observed results Evidence by level

Eight participants evidenced application; sampled gates showed clearer criteria and earlier challenge.

Alternatives Other explanations

New gate templates, sponsor modelling and portfolio stabilisation also plausibly influenced results.

Context Events helping or hindering

Not populated in the original worked extract.

Confidence Low/medium/high with reason

Not populated in the original worked extract.

Decision Scale, adapt, test or stop

Not populated in the original worked extract.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
T66

TOOL

Cost-consequence analysis

Compare programme costs with multiple outcomes transparently.

Practical guide

Working form

Worked example

EXCEL TAB T66 Costconsequence analysis

TIME 60-90 minutes after cost and outcome definitions are validated | OWNER Finance + evaluation

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Set the decision perspective, period, population and comparison basis.
- 02** Calculate full cost, including time, operations, supervision and evaluation.
- 03** Report reach and quality alongside access, completion and adverse effects.

CONTINUE THE METHOD

- 04** Describe application and work consequences in their natural units.
- 05** Compare scenarios without aggregating unlike outcomes or implying causality.

BOUNDARY & CAUTION

Keep unlike consequences visible in their own units; this analysis is not an ROI ratio or licence to double-count value.

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.

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

Omitting participant time, supervision, operations or evaluation from cost; Reporting starts without the eligible denominator, completion or access pattern; Monetising weakly evidenced outcomes while overlooking quality and adverse effects.

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

BASIS H01 / H04 | H04 source p.253



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T66

TOOL

Cost-consequence analysis

Compare programme costs with multiple outcomes transparently.

Practical guide

Working form

Worked example

EXCEL TAB T66 Costconsequence analysis

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

Cost Direct, internal and opportunity costs	
Reach Eligible, started and completed	
Quality Experience and assurance outcomes	
Application Behaviour/practice evidence	
Work outcomes Relevant indicators	
Equity Distribution of access and benefit	
Uncertainty Range and assumptions	
Decision Comparative value judgment	

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T66

TOOL

Cost-consequence analysis

Compare programme costs with multiple outcomes transparently.

Practical guide

Working form

Worked example

EXCEL TAB T66 Costconsequence analysis

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Cost Direct, internal and opportunity costs	Full pilot cost was GBP 96,400, including participant time, supervision, operations and evaluation.
Reach Eligible, started and completed	Eleven of twelve eligible directors started; ten reached midpoint and one deferred voluntarily.
Quality Experience and assurance outcomes	Alliance met threshold; one accessibility delay required correction and no substantiated complaints arose.
Application Behaviour/practice evidence	Eight participants evidenced repeated use in agreed work moments by the 90-day review.
Work outcomes Relevant indicators	Gate clarity improved and six rework events were avoided, with causal contribution uncertain.

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
T67

TOOL

Responsible ROI estimator

Model a financial range without hiding assumptions.

Practical guide

Working form

Worked example

EXCEL TAB T67 Responsible ROI estimator

TIME 90-120 minutes; independent review for public or investment claims | OWNER Finance/evaluation

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Confirm the decision and whether a financial ratio will add useful evidence.
- 02** Validate outcome quantity, unit value, period and counterfactual separately.
- 03** Calculate gross value transparently and reconcile it with full programme cost.

CONTINUE THE METHOD

- 04** Set low, base and high contribution assumptions after testing alternatives.
- 05** Apply an explicit confidence adjustment for design and data quality.
- 06** Present net benefit, ROI sensitivity, non-monetised outcomes and claim limits together.

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 gross benefit ROI before subtracting full programme cost; Double-counting linked delay, rework and productivity benefits; Presenting one attribution estimate with unjustified decimal precision.

BOUNDARY & CAUTION

Use ROI only where outcome quantity and value are credible; never monetise trust, wellbeing or avoided harm speculatively.

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

The source estimator is retained as a sensitivity scenario only. Contribution and confidence factors are judgemental assumptions, not measured causal attribution or probabilities. Cost-consequence reporting is usually the safer primary account.

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

BASIS H01 / H04 | H04 source p.256



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T67

TOOL

Responsible ROI estimator

Model a financial range without hiding assumptions.

Practical guide

Working form

Worked example

EXCEL TAB T67 Responsible ROI estimator

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

Component	Low	Base	High	Evidence / assumption
Measured gross outcome value				
Contribution proportion				
Confidence adjustment				
Scenario-adjusted benefit = gross x contribution x confidence				
Full programme cost				
Net benefit				
Scenario ROI				

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T67

TOOL

Responsible ROI estimator

Model a financial range without hiding assumptions.

Practical guide

Working form

Worked example

EXCEL TAB T67 Responsible ROI estimator

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Outcome quantity Measured change	Six fewer decision-paper rework events than the matched prior-period portfolio pattern.
Unit value Defensible financial value	Finance estimates GBP 7,000 staff and delay cost per comparable rework event.
Gross value Quantity x unit value	Illustrative gross value is GBP 42,000 before any coaching contribution or confidence adjustment.
Attribution % plausibly due to coaching	Base case assigns 30% contribution after considering template and sponsor changes.
Confidence Evidence adjustment	Apply 0.65 for limited comparison quality and retain low/base/high sensitivity scenarios.

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

T68

TOOL

Coach quality scorecard

Review competence, conduct and contribution using multiple evidence sources.

Practical guide

Working form

Worked example

EXCEL TAB T68 Coach quality scorecard

TIME 60-90 minutes per coach after evidence review | OWNER Quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Define the coach role, authorised scope and complexity before reviewing evidence.
- 02** Gather observed practice plus supervision, audit, case and participant evidence.
- 03** Rate contracting, practice, ethics, inclusion and application against behavioural anchors.

CONTINUE THE METHOD

- 04** Apply ethics, competence and confidentiality gates before calculating any profile.
- 05** Calibrate assessors, record examples and agree developmental feedback with the coach.
- 06** Decide authorise, condition, restrict, develop, pause or remove with review date.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Averaging an ethics or confidentiality failure against stronger practice scores; Using credentials and biography as substitutes for observed competence; Allowing one uncalibrated assessor to make an unrestricted authorisation decision.

BOUNDARY & CAUTION

A periodic scorecard does not replace immediate complaint, incident, competence or safeguarding action when a gate fails.

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.259



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T68

TOOL

Coach quality scorecard

Review competence, conduct and contribution using multiple evidence sources.

Practical guide

Working form

Worked example

EXCEL TAB T68 Coach quality scorecard

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

Criterion	1 Below	2 Developing	3 Meets	4 Exceeds	Observed evidence / risk
Ethics and boundaries					
Contracting					
Trust and presence					
Listening					
Awareness / challenge					
Choice and action					
Context / system					
Inclusion / access					
Transfer					
Reflection / supervision					

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
T68

TOOL

Coach quality scorecard

Review competence, conduct and contribution using multiple evidence sources.

Practical guide

Working form

Worked example

EXCEL TAB T68 Coach quality scorecard

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Contracting Audit/feedback evidence	Rated 4: clarified sponsor purpose, confidentiality, technology and re-contracting in observed practice.
Practice Observed competence	Rated 3: strong listening and challenge; occasionally moved from insight to action too quickly.
Ethics Incidents, consultation and compliance	Gate met: refused a sponsor request for content and used supervision appropriately.
Inclusion Access and coachee experience	Rated 3: adapted materials promptly, but initial screen-reader check should occur earlier.
Application Goal/experiment evidence	Rated 4: consistently connected insight to safe, observable capital-project work experiments.

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

T69

TOOL

Supervision record

Structure reflective supervision without unnecessary identifying detail.

Practical guide

Working form

Worked example

EXCEL TAB T69 Supervision record

TIME 30-60 minutes monthly; rapid consultation for material dilemmas | OWNER Coach + supervisor

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Frame one practice question and remove case detail not needed to explore it.
- 02** Describe relevant context, complexity, power and the coach's actual response.
- 03** Identify ethical duties, boundaries, unknowns and any need for rapid action.

CONTINUE THE METHOD

- 04** Generate competing hypotheses rather than treating one interpretation as fact.
- 05** Agree a next practice response, consultation and evidence for review.
- 06** Store the minimum supervision record under the approved access schedule.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Recording names or project detail unnecessary for the supervision question; Turning supervision into unqualified legal or operational decision advice; Generating hypotheses without testing them or reviewing the coach's response.

BOUNDARY & CAUTION

The supervision record is not the participant case file and should contain no unnecessary identifying or session detail.

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.262



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T69

TOOL

Supervision record

Structure reflective supervision without unnecessary identifying detail.

Practical guide

Working form

Worked example

EXCEL TAB T69 Supervision record

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

Supervision focus	Reflective notes - de-identified and minimum necessary
Contract and context	
Coach response / use of self	
Power, identity and system	
Ethical / boundary question	
Alternative hypotheses	
Learning and action	
Consult / escalate / refer	
Follow-up 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

T69

TOOL

Supervision record

Structure reflective supervision without unnecessary identifying detail.

Practical guide

Working form

Worked example

EXCEL TAB T69 Supervision record

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Practice question What needs reflection	How can I challenge avoidance without taking over the director's project decision?
Context Minimum non-identifying information	Coachee repeatedly postpones sponsor dialogue despite a time-critical decision-right ambiguity.
Coach response Thoughts, feelings and use of self	Reflected the pattern, checked consent to challenge and explored one bounded rehearsal.
Ethics Code, boundaries and power	Maintain autonomy, avoid operational advice and escalate only through agreed risk exceptions.
Hypotheses Alternative formulations	Fear of sponsor retaliation, unclear authority or reasonable concern about incomplete evidence.

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

T70

TOOL

Ethical decision record

Make a transparent, proportionate decision in a dilemma.

Practical guide

Working form

Worked example

EXCEL TAB T70 Ethical decision record

TIME 30-60 minutes; immediate consultation where urgency requires | OWNER Coach/quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Record facts, unknowns, urgency, affected parties and practitioner authority.
- 02** Identify relevant codes, contracts, rights, policies and competence limits.
- 03** Name competing values and harms arising from action and inaction.

CONTINUE THE METHOD

- 04** Generate options and obtain qualified consultation where the issue requires it.
- 05** Choose the least intrusive adequate action and minimum necessary disclosure.
- 06** Communicate, document, arrange continuity and review the outcome for system learning.

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

Completing the record afterwards merely to justify an intuitive decision; Treating the framework as a substitute for qualified legal or clinical advice; Disclosing more information than the chosen protective action requires.

BOUNDARY & CAUTION

This record structures ethical reasoning but does not provide legal, clinical, safeguarding or regulatory determination.

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.265



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T70

TOOL

Ethical decision record

Make a transparent, proportionate decision in a dilemma.

Practical guide

Working form

Worked example

EXCEL TAB T70 Ethical decision record

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

Decision step	Working record
Facts, unknowns, urgency and parties	
Law / policy / code / contract	
Values, rights, power and possible harms	
Options and consultation	
Decision, authority and minimum disclosure	
Communication and continuity	
Outcome, review and system learning	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T70

TOOL

Ethical decision record

Make a transparent, proportionate decision in a dilemma.

Practical guide

Working form

Worked example

EXCEL TAB T70 Ethical decision record

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Issue Facts and uncertainty	Sponsor requested themes that could reveal one director's confidential account of gate pressure.
Parties Rights, needs and power	Coachee, coach, sponsor, programme owner and colleagues potentially identifiable in a small cohort.
Standards Contract, code, law and policy	Three-way contract, confidentiality policy, data-minimisation duty and applicable professional ethics code.
Options Possible actions	Decline, provide safely aggregated themes later, seek coachee permission or obtain independent advice.
Consequences Benefit, harm and reversibility	Disclosure risks trust and identification; refusal requires a useful system-level alternative.

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

T71

TOOL

Incident and complaint pathway

Respond fairly, promptly and without retaliation.

Practical guide

Working form

Worked example

EXCEL TAB T71 Incident and complaint path

TIME Immediate protection; triage within SLA; duration stated case by case | **OWNER** Quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Receive the concern accessibly, check immediate safety and prevent retaliation.
- 02** Acknowledge receipt, explain confidentiality limits, timing and available support.
- 03** Triage severity, route, investigator competence, independence and conflicts.

CONTINUE THE METHOD

- 04** Gather minimum relevant evidence while preserving fairness and updates.
- 05** Decide findings, remedy, provider or coach action and review rights.
- 06** Verify completion and analyse protected trends without exposing the complainant.

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

Routing a complaint solely through the coach or provider being challenged; Delaying immediate protection until the full investigation has concluded; Omitting non-retaliation, conflict checks, updates and review rights.

BOUNDARY & CAUTION

Do not use the routine complaint pathway for emergencies; activate the named urgent or statutory route immediately.

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.268



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T71

TOOL

Incident and complaint pathway

Respond fairly, promptly and without retaliation.

Practical guide

Working form

Worked example

EXCEL TAB T71 Incident and complaint path

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

Concern / complaint ID	Received / ack	Immediate protection	Triage / conflict	Investigator / SLA	Outcome / remedy	Review / closed

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T71

TOOL

Incident and complaint pathway

Respond fairly, promptly and without retaliation.

Practical guide

Working form

Worked example

EXCEL TAB T71 Incident and complaint path

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Concern What was reported	Participant reports repeated pressure from a coach to share private assessment results with management.
Immediate safety Protection needed	No urgent danger identified; pause coach contact and preserve an alternative support route.
Acknowledgement Timing and contact	Independent case manager confirms receipt within one working day and explains protection.
Route Informal resolution, investigation or external referral	Formal complaint review with consent-based evidence gathering and a stated ten-day update.
Independence Conflict-free decision maker	Reviewer sits outside the coaching provider and has no reporting relationship to the sponsor.

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

T72

TOOL

AI coaching assurance checklist

Test AI coaching across ethics, experience, safety and technical controls.

Practical guide

Working form

Worked example

EXCEL TAB T72 AI coaching assurance check

TIME Half-day review plus scenario testing; repeat after material change | **OWNER** Product + privacy + quality

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Freeze the approved use case, population, version, claims and prohibited tasks.
- 02** Test disclosure, comprehension, meaningful choice and an equivalent human alternative.
- 03** Verify data flows, security, retention, deletion and model-training restrictions.

CONTINUE THE METHOD

- 04** Run bias and accessibility tests across representative language and identity variants.
- 05** Challenge safety boundaries with clinical, legal, employment and dependency scenarios.
- 06** Record release conditions, accountable monitoring and material-change retest triggers.

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

Accepting a vendor marketing claim as the approved use case; Allowing model, prompt or data changes without regression testing; Calling participation voluntary when no equivalent human route exists.

BOUNDARY & CAUTION

Checklist completion is not proof that an AI service is safe, effective or suitable for every user or context.

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.271



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T72

TOOL

AI coaching assurance checklist

Test AI coaching across ethics, experience, safety and technical controls.

Practical guide

Working form

Worked example

EXCEL TAB T72 AI coaching assurance check

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

Assurance domain	Test cases / evidence	Threshold	Pass / condition / fail	Action / owner
Use case and exclusions				
Disclosure and user choice				
Privacy and deletion				
Security and subprocessors				
Safety / boundary scenarios				
Bias / language / accessibility				
Coaching quality and evidence				
Human oversight / complaint				
Employment-use prohibition				
Version / change / continuity				

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T72

TOOL

AI coaching assurance checklist

Test AI coaching across ethics, experience, safety and technical controls.

Practical guide

Working form

Worked example

EXCEL TAB T72 AI coaching assurance check

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Use case Approved purpose and population	Optional AI reflection assistant drafts questions after sessions; it never gives project decisions.
Disclosure User understanding and choice	Users see the AI role, limitations, version and human alternative before first use.
Privacy Data, logs, training and deletion	No session transcript, special-category data, model training or employment reuse is permitted.
Bias Language/group tests	Test prompts across language, disability and cultural-expression variants; investigate differential failure rates.
Safety Boundary and escalation scenarios	Crisis, legal, employment and high-stakes project prompts trigger boundaries and qualified human routes.

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

T73

TOOL

Quarterly portfolio review

Turn evidence into scale, adapt and stop decisions.

Practical guide

Working form

Worked example

EXCEL TAB T73 Quarterly portfolio review

TIME 90-120 minutes quarterly after protected pack review | OWNER Coaching governance board

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Reconfirm strategic fit and whether coaching remains the right intervention.
- 02** Examine demand, reach, completion, access and unmet need by safe segments.
- 03** Review coach quality, alliance, complaints, incidents and corrective actions.

CONTINUE THE METHOD

- 04** Test application evidence and the organisational conditions enabling transfer.
- 05** Interpret outcomes, equity, cost and risks without unsupported attribution.
- 06** Make fix, adapt, scale, pause or stop decisions with owners and dates.

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

Celebrating demand and attendance as evidence of strategic value; Using averages that conceal a quality failure or access disparity; Scaling on outcome trends before confirming delivery and application.

BOUNDARY & CAUTION

The board should receive protected aggregate evidence and must not seek private content to explain a programme trend.

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.274



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T73

TOOL

Quarterly portfolio review

Turn evidence into scale, adapt and stop decisions.

Practical guide

Working form

Worked example

EXCEL TAB T73 Quarterly portfolio review

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

Pathway / population	Delivery / access	Quality / alliance	Application / behaviour	Outcome / cost	Risk / equity	Decision + 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
T73

TOOL

Quarterly portfolio review

Turn evidence into scale, adapt and stop decisions.

Practical guide

Working form

Worked example

EXCEL TAB T73 Quarterly portfolio review

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Strategic fit Priority and population	Pilot still supports reliable capital decisions; decision-right redesign remains a separate sponsor action.
Demand/reach Access and equity	Eleven of twelve started; one deferred voluntarily and no eligible group shows access disparity.
Quality Contract, fit, supervision and incidents	Alliance and coach-quality gates met; one accessibility delay has a named corrective owner.
Application Experiments and behaviour	Eight of ten midpoint participants evidenced repeated use in agreed project work moments.
Outcomes Goal and work evidence	Decision clarity trend improved; causal claims remain limited by concurrent workflow changes.

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
T74

TOOL

Maturity assessment

Assess organisational coaching capability against four evidence-gated levels.

Practical guide

Working form

Worked example

EXCEL TAB T74 Maturity assessment

TIME Half to one day annually; targeted re-rating after 90 days | **OWNER** Independent review team

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Form an independent cross-functional panel and define the assessment boundary.
- 02** Collect current evidence across purpose, programme, practice, protection and application.
- 03** Rate only the descriptor consistently achieved, recording variation and confidence.

CONTINUE THE METHOD

- 04** Apply ethics, data and complaints gates before any overall maturity conclusion.
- 05** Prioritise binding constraints by strategy, trust, transfer and risk impact.
- 06** Assign 90-day actions and re-rate changed dimensions with fresh 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

Rating future plans and policies as current operating maturity; Averaging protection failures into an apparently acceptable overall level; Producing an exhaustive improvement list without sequencing the binding constraints.

BOUNDARY & CAUTION

This is an internal improvement assessment, not accreditation, validation or a benchmark against unnamed organisations.

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

This edition uses H04 Appendix M: 1 Ad hoc, 2 Defined, 3 Integrated, 4 Adaptive. H03 uses different labels and an 80% rule; these are not combined here. Rate each dimension against its evidence anchor; do not calculate an overall level.

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

BASIS H01 / H04 | H04 source p.277



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T74

TOOL

Maturity assessment

Assess organisational coaching capability against four evidence-gated levels.

Practical guide

Working form

Worked example

EXCEL TAB T74 Maturity assessment

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

Dimension	Level 1-4 or N/O	Evidence / confidence	Critical gap / exception	90-day action / owner
Strategic purpose				
Leadership sponsorship				
Portfolio design				
Access and inclusion				
Contracting				
Coach capability				
Matching				
Supervision				
Manager ecosystem				
Application				
Measurement				
Data and privacy				
AI and technology				
Ethics and complaints				
Supplier management				
Continuous improvement				

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T74

TOOL

Maturity assessment

Assess organisational coaching capability against four evidence-gated levels.

Practical guide

Working form

Worked example

EXCEL TAB T74 Maturity assessment

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose Strategic alignment evidence	Level 3: approved use cases connect strategy, evidence, alternatives and explicit exclusion routes.
Programme Pathways and operations	Level 2: pilot operations are repeatable, but capacity and equity evidence remain incomplete.
Practice Capability and supervision	Level 3: observed competence, supervision and alliance repair operate consistently across approved coaches.
Protection Ethics, equity, data and AI	Level 3 gate met: contracts, concerns and data routes tested; one access control improved.
Application Transfer environment	Level 2: transfer planning is standard, although manager support varies by portfolio.

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

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 1 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
Strategic purpose	Coaching is purchased case by case with no common rationale.	A charter names priority uses and exclusions.	Portfolio choices are linked to capability and workforce priorities.	Investment is dynamically reallocated using strategy, outcomes and risk evidence.
Leadership sponsorship	Support depends on individual advocates.	A sponsor is named and briefed on boundaries.	Leaders model learning and act on aggregate system themes.	The executive team governs coaching as a strategic capability.
Portfolio design	Offers overlap and populations are unclear.	Pathways, populations and modes are documented.	Demand, need, complexity, equity and cost shape an integrated portfolio.	Scenario planning and evidence drive continuous portfolio optimisation.
Access and inclusion	Access follows status, networks or manager preference.	Published criteria and basic adjustments exist.	Access, experience and outcomes are reviewed across relevant groups.	Inclusive design, differentiated pathways and barrier removal are embedded.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 2 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
Contracting	Purpose and confidentiality are informal or inconsistent.	Minimum four-way contracting and information protocols are used.	Contract quality is audited and re-contracting is routine.	Contracting practice anticipates complex sponsorship, technology and system work.
Coach capability	Selection is based mainly on biography or availability.	Training/credentials and references are checked.	Observed competence, scope and development are role-specific.	Capability is calibrated, researched and renewed across a professional faculty.
Matching	An administrator assigns the next available coach.	Basic need, preference and conflict checks operate.	Choice, chemistry, complexity and rematch evidence inform matching.	Matching quality is evaluated and improved without intrusive profiling.
Supervision	Supervision is absent or optional.	Minimum cadence and a qualified route are defined.	Risk-proportionate individual/group supervision and rapid consultation operate.	Supervision insight strengthens practice and system learning while preserving confidentiality.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 3 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
Manager ecosystem	Managers confuse coaching with telling or hidden assessment.	Managers receive boundary and conversation guidance.	Coaching behaviours, feedback, opportunity and performance clarity reinforce transfer.	Leaders consistently combine coaching, direction and accountability with role clarity.
Application	Success is attendance or session satisfaction.	Goals and actions are recorded.	Work experiments, stakeholder support and follow-up are designed into pathways.	Transfer climate and system barriers are actively managed using behavioural evidence.
Measurement	Testimonials and participation dominate reporting.	Delivery, experience and goal progress are defined.	Behaviour, outcome, contribution, equity, cost and risk are triangulated.	Evaluation design is matched to decisions and supports credible comparative learning.
Data and privacy	Records, access and retention vary by coach/provider.	Minimum data rules and access controls are documented.	Lifecycle mapping, deletion tests and privacy review cover all pathways.	Privacy-preserving design and assurance adapt to emerging use and regulation.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 4 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
AI and technology	Tools are adopted informally or hidden in platforms.	Approved use cases, disclosure and basic security review exist.	Bias, safety, accessibility, change and human oversight are tested.	Continuous technical and ethical assurance governs a transparent human-AI service portfolio.
Ethics and complaints	Issues depend on personal judgment and informal escalation.	A code, complaint route and urgent escalation process exist.	Dilemmas, incidents and complaint trends inform supervised improvement.	Ethical reasoning, simulations and independent review strengthen organisational trust.
Supplier management	Procurement focuses on price and coach profiles.	Minimum quality, data and service terms are contractual.	Performance, coach quality, continuity and evidence are reviewed jointly.	Supplier innovation is governed through outcomes, risk, interoperability and exit readiness.
Continuous improvement	Changes follow anecdotes or crises.	An annual review and action plan exist.	Quarterly evidence drives recorded fix/scale/adapt/stop decisions.	Learning cycles, experiments and external evidence continuously evolve the system.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
T77

TOOL

Coach selection and observed-practice rubric

Select coaches through evidence and observed judgment rather than biography alone.

Practical guide

Working form

Worked example

EXCEL TAB T77 Coach selection and observe

TIME 75-120 minutes per candidate plus calibration | OWNER Practice lead + trained assessors

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Freeze role-specific criteria, anchors, weights and mandatory gates before selection.
- 02** Use the same case, observed sample and evidence instructions for candidates.
- 03** Observe contracting, relationship, inquiry, challenge, action, context and ethics.

CONTINUE THE METHOD

- 04** Have assessors rate independently and record behaviour supporting each score.
- 05** Calibrate differences and examine every risk flag before the decision.
- 06** Decide, feedback, retain minimum evidence and schedule reassessment where conditional.

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

Scoring personal style similarity instead of role-relevant coaching behaviour; Changing criterion weights after assessors see candidate performance; Averaging a safeguarding, ethics or confidentiality red flag into the total.

BOUNDARY & CAUTION

Selection scores cannot override a mandatory gate, unresolved conflict or missing evidence of authorised 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.280



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T77

TOOL

Coach selection and observed-practice rubric

Select coaches through evidence and observed judgment rather than biography alone.

Practical guide

Working form

Worked example

EXCEL TAB T77 Coach selection and observe

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

Criterion	1 Below	2 Developing	3 Meets	4 Exceeds	Observed evidence / risk
Ethics and boundaries					
Contracting					
Trust and presence					
Listening					
Awareness / challenge					
Choice and action					
Context / system					
Inclusion / access					
Transfer					
Reflection / supervision					

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T77

TOOL

Coach selection and observed-practice rubric

Select coaches through evidence and observed judgment rather than biography alone.

Practical guide

Working form

Worked example

EXCEL TAB T77 Coach selection and observe

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Criterion Contracting, ethics, listening, awareness, challenge, action, system, inclusion	Maintains coachee autonomy while challenging avoidance in a sponsor-pressure scenario.
Evidence source Application, case, observed session, references	Twenty-minute observed coaching sample, structured case response and supervision example.
Rating 1 below / 2 developing / 3 meets / 4 exceeds	3 of 4: consistent practitioner behaviour with one missed check on access preference.
Behavioural evidence What assessors observed	Named the power dynamic, sought permission to challenge and returned choice to coachee.
Risk flag Boundary or conduct concern	No ethical gate failure; require accessibility refresher before first Meridian assignment.

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.

T79

TOOL

Supervision standard and cadence

Define supervision purpose, frequency, competence, records and escalation across the coaching service.

Practical guide

Working form

Worked example

EXCEL TAB T79 Supervision standard and ca

TIME 90-minute design review; reassess after incident or scope change | OWNER Practice lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Segment coach groups by role, competence, caseload and assignment complexity.
- 02** Set minimum individual and group cadence, increasing support where risk rises.
- 03** Specify supervisor competence, independence, capacity and conflict controls.

CONTINUE THE METHOD

- 04** Define pseudonymisation, record access and case-detail protection requirements.
- 05** Publish rapid consultation triggers, contacts, response times and fallback routes.
- 06** Audit attendance, themes and corrective action without accessing session content.

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

Applying one cadence irrespective of caseload, competence or case complexity; Using a supervisor with unresolved commercial or line-management conflicts; Sharing recognisable participant detail in group supervision.

BOUNDARY & CAUTION

Published cadence is a minimum; emerging risk, novice practice or complex cases may require more or different supervision.

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.283



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T79

TOOL

Supervision standard and cadence

Define supervision purpose, frequency, competence, records and escalation across the coaching service.

Practical guide

Working form

Worked example

EXCEL TAB T79 Supervision standard and ca

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

Coach group / scope	Complexity / caseload	Individual cadence	Group cadence	Supervisor standard	Rapid route	Evidence / response

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
T79

TOOL

Supervision standard and cadence

Define supervision purpose, frequency, competence, records and escalation across the coaching service.

Practical guide

Working form

Worked example

EXCEL TAB T79 Supervision standard and ca

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Coach group Role, complexity and caseload	Six authorised coaches supporting project directors across three capital-investment portfolios.
Minimum cadence Individual/group frequency and duration	Individual supervision monthly and after six delivery hours, whichever occurs first.
Supervisor standard Competence and independence	Accredited, independent practitioner experienced in organisational, ethical and sponsor-system complexity.
Case protection De-identification and consent rules	Use pseudonyms and minimum context; never upload client details to unapproved systems.
Rapid consultation Route for urgent dilemmas	Same working day for ethical uncertainty; immediate named route for urgent safety concerns.

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
T80

TOOL

Coach authorisation, CPD and caseload record

Maintain current authorisation based on competence, supervision, capacity and conduct.

Practical guide

Working form

Worked example

EXCEL TAB T80 Coach authorisation CPD and

TIME 15-20 minutes quarterly; 45-60 minutes for reauthorisation | OWNER Practice lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Register each coach, authorised scope, restrictions and review date.
- 02** Link current observed-competence evidence to the capability framework.
- 03** Record role-relevant CPD and whether learning changed demonstrated practice.

CONTINUE THE METHOD

- 04** Verify supervision cadence, supervisor suitability and outstanding actions.
- 05** Review caseload, complexity, incidents, complaints and conditional requirements.
- 06** Authorise, condition, restrict, pause or end scope and notify operations.

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

An up-to-date register supports control but is not, by itself, evidence that current practice remains competent.

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

Counting CPD hours as proof of current observed competence; Missing an expired condition, scope restriction or overdue review; Recording caseload without testing capacity against complexity and supervision.

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

BASIS H01 / H04 | H04 source p.286



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T80

TOOL

Coach authorisation, CPD and caseload record

Maintain current authorisation based on competence, supervision, capacity and conduct.

Practical guide

Working form

Worked example

EXCEL TAB T80 Coach authorisation CPD and

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

Coach	Authorised scope	Observation	CPD	Supervision	Caseload	Incidents / conditions	Decision / 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
T80

TOOL

Coach authorisation, CPD and caseload record

Maintain current authorisation based on competence, supervision, capacity and conduct.

Practical guide

Working form

Worked example

EXCEL TAB T80 Coach authorisation CPD and

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Coach Identifier and role	A. Patel, external practitioner; authorisation record MIG-CO-014, reviewed by quality lead.
Authorised scope Population, complexity and modes	Project directors through moderate sponsor complexity; excludes clinical, mediation and formal employee cases.
Observed competence Date, method and outcome	Rated practitioner level on 12 May; ethics gate met and access condition completed.
CPD Learning linked to need	Nine hours on power, accessibility and team-system coaching since the previous review.
Supervision Cadence and current status	Monthly individual supervision current; next evidence review due 30 November.

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.

T85

TOOL

Evaluation design and data-collection matrix

Match each evaluation question to a proportionate design, measure, source and decision.

Practical guide

Working form

Worked example

EXCEL TAB T85 Evaluation design and datac

TIME Half-day design; specialist review for experimental or linked data | **OWNER** Evaluation lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Write each evaluation question as a decision the evidence will inform.
- 02** Map outcomes and mechanisms from the programme theory of change.
- 03** Define balanced indicators for delivery, application, equity, risk, cost and outcome.

CONTINUE THE METHOD

- 04** Specify source, method, timing, population, missingness and privacy controls.
- 05** Choose a design proportionate to the intended descriptive or causal claim.
- 06** Pre-set thresholds and responses, then pilot burden and comprehension before baseline.

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 evaluation questions after seeing the available results; Measuring satisfaction while omitting mechanism, application, equity and risk; Adding privacy controls only after identifiable data have been collected.

BOUNDARY & CAUTION

Do not design evaluation after delivery begins if baseline, consent or comparison evidence is essential to the decision.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.289



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T85

TOOL

Evaluation design and data-collection matrix

Match each evaluation question to a proportionate design, measure, source and decision.

Practical guide

Working form

Worked example

EXCEL TAB T85 Evaluation design and datac

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

Decision question	Outcome / mechanism	Indicator / definition	Source / timing	Design	Privacy / quality	Threshold / decision

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T85

TOOL

Evaluation design and data-collection matrix

Match each evaluation question to a proportionate design, measure, source and decision.

Practical guide

Working form

Worked example

EXCEL TAB T85 Evaluation design and datac

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision question What decision will the evidence inform?	Should Meridian expand, adapt or stop coaching after the next two cohorts?
Outcome/mechanism What is expected to change and why	Decision framing improves through reflection, rehearsal, workplace experiments and manager-enabled opportunity.
Indicator Operational definition	Repeated application rate, behaviour evidence, alliance, access, adverse events, cost and decision clarity.
Source/method Self, stakeholder, work data or qualitative evidence	Protected operations data, pulses, behaviour interviews, portfolio trend comparison and contribution analysis.
Timing Baseline, midpoint, close, follow-up	Baseline, early-session pulse, midpoint, closure, 90-day transfer and quarter-end decision review.

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
T86

TOOL

Aggregate themes and organisational action log

Convert legitimate cross-engagement themes into system action without exposing individual coaching content.

Practical guide

Working form

Worked example

EXCEL TAB T86 Aggregate themes and organi

TIME 60-90 minutes quarterly after protected theme preparation | OWNER Programme owner + sponsor

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Aggregate only recurring themes that meet the approved protection threshold.
- 02** Assess source diversity, evidence quality, confidence and meaningful exceptions.
- 03** Test whether wording, timing or segmentation could enable identification.

CONTINUE THE METHOD

- 04** Translate the protected theme into a plausible system implication.
- 05** Assign organisational action, owner, due date and success evidence.
- 06** Feed back the aggregate response and review whether the condition changes.

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

Reporting a specific theme that identifies a person or small team; Turning confidential learning into evidence for individual performance action; Logging an organisational issue without feedback, ownership or review.

BOUNDARY & CAUTION

Aggregate themes must never be reverse-engineered for individual employment action or disclosed below the protection threshold.

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.292



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T86

TOOL

Aggregate themes and organisational action log

Convert legitimate cross-engagement themes into system action without exposing individual coaching content.

Practical guide

Working form

Worked example

EXCEL TAB T86 Aggregate themes and organi

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

Protected theme	Evidence / confidence	Aggregation / risk	System implication	Action	Owner / due	Feedback / 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

T86

TOOL

Aggregate themes and organisational action log

Convert legitimate cross-engagement themes into system action without exposing individual coaching content.

Practical guide

Working form

Worked example

EXCEL TAB T86 Aggregate themes and organi

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Theme Minimum-threshold aggregate pattern	Late sponsor preference narrows challenge before capital-project options have been fully tested.
Evidence base Number, sources and confidence	Raised independently by nine participants across three coaches, with moderate confidence and no quotations.
Protection Aggregation/suppression and residual risk	Report only the cross-portfolio pattern; suppress workstream, identity and potentially revealing examples.
System implication Process, workload, capability, culture or policy	Gate design and sponsor behaviour may constrain the capability coaching seeks to strengthen.
Action Named organisational response	Investment governance lead revises chair guidance and tests recommendation-last agendas for one quarter.

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

T87

TOOL

Quality-assurance sampling plan

Define risk-based sampling of contracts, coach practice, data, experience, outcomes and incidents.

Practical guide

Working form

Worked example

EXCEL TAB T87 Qualityassurance sampling p

TIME 90-minute planning; sampling effort proportionate to risk | OWNER Quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Prioritise quality domains from mandatory standards, incidents and current risk.
- 02** Define the population and choose a method that answers the control question.
- 03** Set sample size and selection rationale, including high-risk and random elements.

CONTINUE THE METHOD

- 04** Write pass, exception and severity standards before reviewers see evidence.
- 05** Assign independent competent reviewers and protect participant information.
- 06** Record findings, corrective owners and follow-up testing to verify closure.

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

Selecting an easy sample that cannot detect the material quality risk; Reviewing private session content when process evidence would answer the question; Recording findings without severity, corrective action or follow-up verification.

BOUNDARY & CAUTION

Periodic sampling cannot replace continuous concern routes, incident response or mandatory review of every critical exception.

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.295



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T87

TOOL

Quality-assurance sampling plan

Define risk-based sampling of contracts, coach practice, data, experience, outcomes and incidents.

Practical guide

Working form

Worked example

EXCEL TAB T87 Qualityassurance sampling p

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

Domain / population	Method	Sample / rationale	Standard / severity	Reviewer	Finding / action	Follow-u p

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T87

TOOL

Quality-assurance sampling plan

Define risk-based sampling of contracts, coach practice, data, experience, outcomes and incidents.

Practical guide

Working form

Worked example

EXCEL TAB T87 Qualityassurance sampling p

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Quality domain Contract, practice, supervision, data, AI, outcome or supplier	Three-way contracting and information-boundary compliance across active individual coaching assignments.
Population What may be sampled	All 24 new contracts this quarter; session notes and private content are excluded.
Method Audit, observation, interview, test or data review	Independent document review against five controls, followed by factual owner clarification where needed.
Sample/rationale Size, stratification and risk basis	Review all contracts because the cohort is small and confidentiality is a mandatory gate.
Standard Pass criteria and severity	100% named information boundaries and exceptions; any absent consent pauses the assignment.

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
T88

TOOL

Supplier/platform continuity and exit plan

Protect participants, records and service continuity during outage, supplier failure, contract end or material platform change.

Practical guide

Working form

Worked example

EXCEL TAB T88 Supplierplatform continuity

TIME 2-3 hour plan; annual exercise and post-change retest | OWNER Programme owner + procurement + technology

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

- 01** Scenario-test outage, breach, acquisition, model change, insolvency and contract end.
- 02** Prioritise critical participant services, records, access needs and dependencies.
- 03** Set measurable triggers, invocation authority and specialist escalation contacts.

CONTINUE THE METHOD

- 04** Define alternative delivery, coach continuity and privacy-safe communication.
- 05** Contract data export, reconciliation, verified deletion and subprocessor obligations.
- 06** Exercise the plan, time recovery, remediate defects and retest material changes.

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

Assuming provider cooperation and system access will remain available after failure; Sending continuity messages that reveal participation or sensitive circumstances; Accepting a deletion promise without export reconciliation and verification.

BOUNDARY & CAUTION

A continuity plan is ineffective without enforceable data rights, offline contacts, tested alternatives and named invocation authority.

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.298



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T88

TOOL

Supplier/platform continuity and exit plan

Protect participants, records and service continuity during outage, supplier failure, contract end or material platform change.

Practical guide

Working form

Worked example

EXCEL TAB T88 Supplierplatform continuity

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

Scenario / trigger	Critical service / data	Authority	Continuity action	Data return / deletion	Communication	Test / residual risk

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T88

TOOL

Supplier/platform continuity and exit plan

Protect participants, records and service continuity during outage, supplier failure, contract end or material platform change.

Practical guide

Working form

Worked example

EXCEL TAB T88 Supplierplatform continuity

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Scenario Outage, breach, acquisition, model change, insolvency or exit	Provider platform unavailable for more than four hours during an active coaching week.
Critical service/data What must be protected	Upcoming sessions, participant contacts, accessibility settings, contracts and current concern routes.
Trigger/authority Who invokes the plan	Four-hour outage triggers continuity; service owner activates with privacy and technology leads.
Continuity action Alternative coach, channel or process	Move sessions to approved video, notify coaches and preserve the no-fault rescheduling option.
Data return/deletion Format, verification and timing	Provider exports records in agreed format within 24 hours and verifies residual deletion.

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
X69

ACTIVITY

Anchored goal-attainment review

Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.

Practical guide

Working form

Worked example

EXCEL TAB X69 Anchored goalattainment rev

TIME 60 minutes

BRING Goal and anchors agreed before review | Work evidence | Coachee and authorised stakeholder perspectives

RUN THE ACTIVITY

- 01** Revisit the original goal, timeframe and five anchors from much less than expected to much more than expected. Do not rewrite the expected level merely to make the result favourable.
- 02** Check that evidence concerns the same behaviour, opportunity and conditions used when the anchors were set. Record changes in role or context separately.
- 03** Review work records, observations and the coachee's account. Keep disagreement visible and identify missing evidence rather than filling it with confidence.

QUESTIONS TO OPEN THINKING

What was expected before we saw the result?
Which evidence supports this anchor?
What else contributed to the change?

CONTINUE THE METHOD

- 04** Select the best-supported anchor for each goal or mark insufficient evidence. The number describes this goal and does not compare the executive with others.
- 05** Explore contribution: what coaching may have helped, what the coachee and others did, and what else changed. Do not claim causal attribution from a before-after score.
- 06** Decide retain, revise, extend or close the goal. Agree what may be shared and the next maintenance step.

BOUNDARY & CAUTION

These are individual developmental anchors, not clinical GAS norms or a psychometric T-score. Do not average unlike goals into a competence verdict.

BETWEEN SESSIONS / HAND-OFF

Assemble the agreed evidence and mark what is missing before the review rather than selecting a favourable rating first.

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

BASIS H01 / H04 / R26 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X69 Anchored goal-attainment review

ACTIVITY

Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.

Guide

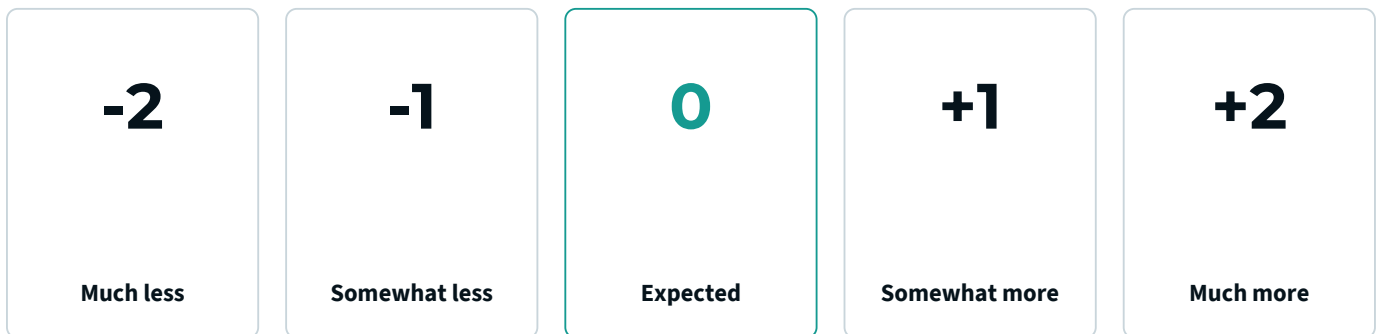
Worksheet

Example

LIVE WORKSHEET

FIVE-ANCHOR ATTAINMENT RAIL

THE ORIGINAL FIVE ANCHORS



Copy the pre-agreed descriptions before reviewing the evidence.

Ordinal anchors for one goal; do not average them into an overall leadership score.

01 Goal

02 Predefined expected level

03 Evidence

04 Attainment

05 Contribution and limits

06 Next decision

Basis: H01 / H04 / R26 | Original executive application

X69 Anchored goal-attainment review

ACTIVITY

Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.

Guide

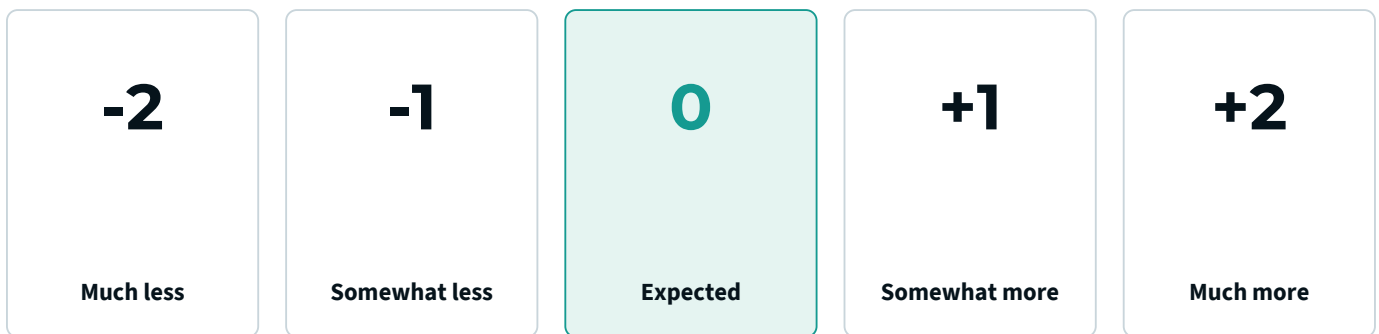
Worksheet

Example

FICTIONAL WORKED EXAMPLE

FIVE-ANCHOR ATTAINMENT RAIL

THE ORIGINAL FIVE ANCHORS



Expected level achieved for this bounded goal.

Ordinal anchors for one goal; do not average them into an overall leadership score.

01 Goal

Use clear decision framing and invite challenge in two gate reviews.

03 Evidence

Two records and consented feedback show the sequence was used; one concern changed an approval condition.

05 Contribution and limits

Rehearsal helped M-07's response, while earlier evidence and sponsor clarification also mattered.

02 Predefined expected level

At both reviews, state the question, hear decision-relevant concerns and close with owner and conditions.

04 Attainment

Expected level achieved for this bounded goal; no overall leadership score is inferred.

06 Next decision

Retain the routine and review its usefulness after three further opportunities, without repeating the full assessment battery.

Basis: H01 / H04 / R26 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
X70

ACTIVITY

Learning and contribution story

Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.

Practical guide

Working form

Worked example

EXCEL TAB X70 Learning and contribution s

TIME 60 minutes

BRING Original value hypothesis | Goal and experiment records | Relevant operational context and agreed sharing boundaries

RUN THE ACTIVITY

- 01** State the original question and the contribution coaching was expected to make. Separate programme participation from actual changes in practice.
- 02** Build a short evidence chain: conversation or rehearsal, chosen action, workplace application, observed consequence. Mark weak links and missing evidence.
- 03** Identify other influences, including support, resources, system changes and external events. Do not treat them as inconvenient noise to remove from the story.

CONTINUE THE METHOD

- 04** Include what did not improve, what was stopped and any unintended effects. A useful evaluation can justify adaptation rather than expansion.
- 05** Choose a proportionate claim using language such as contributed to, was consistent with or remains uncertain where appropriate. Avoid unsupported financial attribution.
- 06** Prepare a coachee-approved summary for the relevant audience and retain private material separately. End with a decision and the evidence needed next.

QUESTIONS TO OPEN THINKING

What changed in work, not just in the conversation?
What else helped or hindered?
What is the strongest claim the evidence actually supports?

BOUNDARY & CAUTION

Do not monetise confidence or assign an invented percentage of business improvement to coaching. Use transparent assumptions only in clearly labelled sensitivity scenarios.

BETWEEN SESSIONS / HAND-OFF

Draft a one-page account with evidence, alternative explanations, limits and the next decision; approve what may be shared.

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

BASIS H01 / H03 / H04 / R06 / R07 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X70 Learning and contribution story

ACTIVITY

Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.

Guide

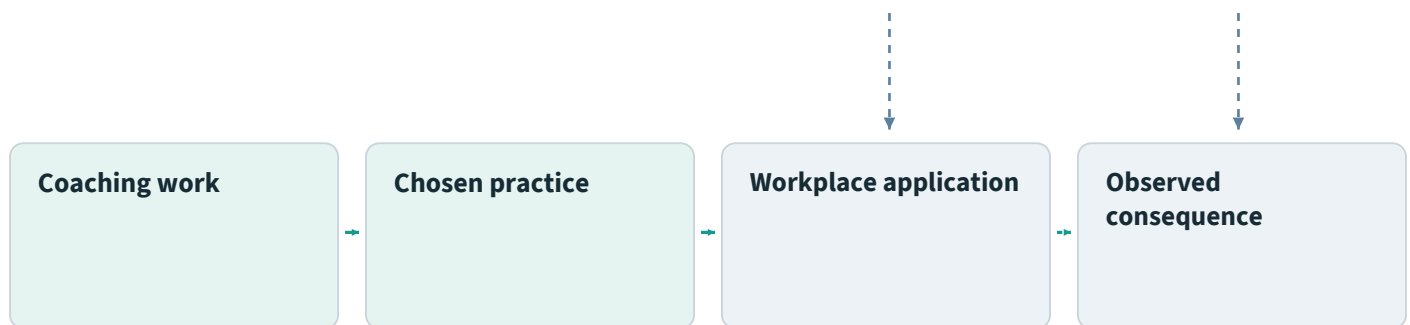
Worksheet

Example

LIVE WORKSHEET

CONTRIBUTION EVIDENCE CHAIN

Other influences: people, resources, timing, systems



Contribution is a reasoned claim, not proof of sole causation.

Keep weak links, alternative explanations, adverse effects and missing evidence visible.

01 Original hypothesis

02 Application evidence

03 Observed consequence

04 Other influences

05 Limits and adverse effects

06 Conclusion and decision

Basis: H01 / H03 / H04 / R06 / R07 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X70 Learning and contribution story

ACTIVITY

Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

CONTRIBUTION EVIDENCE CHAIN

Other influences: people, resources, timing, systems



Contribution is a reasoned claim, not proof of sole causation.

Keep weak links, alternative explanations, adverse effects and missing evidence visible.

01 Original hypothesis

Clearer contracting and rehearsal would help M-07 invite challenge and retain shared ownership at gates.

03 Observed consequence

A material concern surfaced before endorsement and the decision conditions were clearer.

05 Limits and adverse effects

Preparation burden increased slightly and the supplier delay was not resolved.

02 Application evidence

The new sequence was used in two meetings and one delegation checkpoint.

04 Other influences

Earlier evidence circulation and sponsor clarification also enabled the change.

06 Conclusion and decision

Coaching plausibly contributed to a useful practice change; retain the routine and address the supplier issue separately, without claiming a financial return.

Basis: H01 / H03 / H04 / R06 / R07 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X71

ACTIVITY

Six-month maintenance and self-coaching plan

Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.

Practical guide

Working form

Worked example

EXCEL TAB X71 Sixmonth maintenance and se

TIME 50 minutes

BRING Two or three practices worth retaining | Likely future pressures | Available peer, manager and professional support

RUN THE ACTIVITY

- 01 Identify the practices that have demonstrated value and the conditions that support them. Do not carry forward every exercise simply because it was completed.
- 02 For each practice, name the real-world cue and the evidence that it remains useful. Include a signal that the practice should be adapted or stopped.
- 03 Anticipate likely disruptions such as a role change, travel, workload or a new sponsor. Agree a proportionate response rather than a rigid maintenance promise.

QUESTIONS TO OPEN THINKING

What is genuinely worth sustaining?

What will tell you the context has changed?

When would you need different help rather than more of the same?

CONTINUE THE METHOD

- 04 Choose a light self-review rhythm and a willing support partner where helpful. Keep private reflection separate from organisational reporting.
- 05 Clarify when to seek further coaching, management action, technical advice or qualified health support. Continuing support should be based on need, not an assumption that closure is unsafe.
- 06 Write a six-month plan with no more than three commitments and a final review question about independence and value.

BOUNDARY & CAUTION

Maintenance is not a promise that difficulties will not return. Avoid dependency and do not replace appropriate specialist support with self-coaching.

BETWEEN SESSIONS / HAND-OFF

Put the first review in your own calendar and prepare a brief prompt you can use without the coach.

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

BASIS H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X71 Six-month maintenance and self-coaching plan

ACTIVITY

Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.

Guide

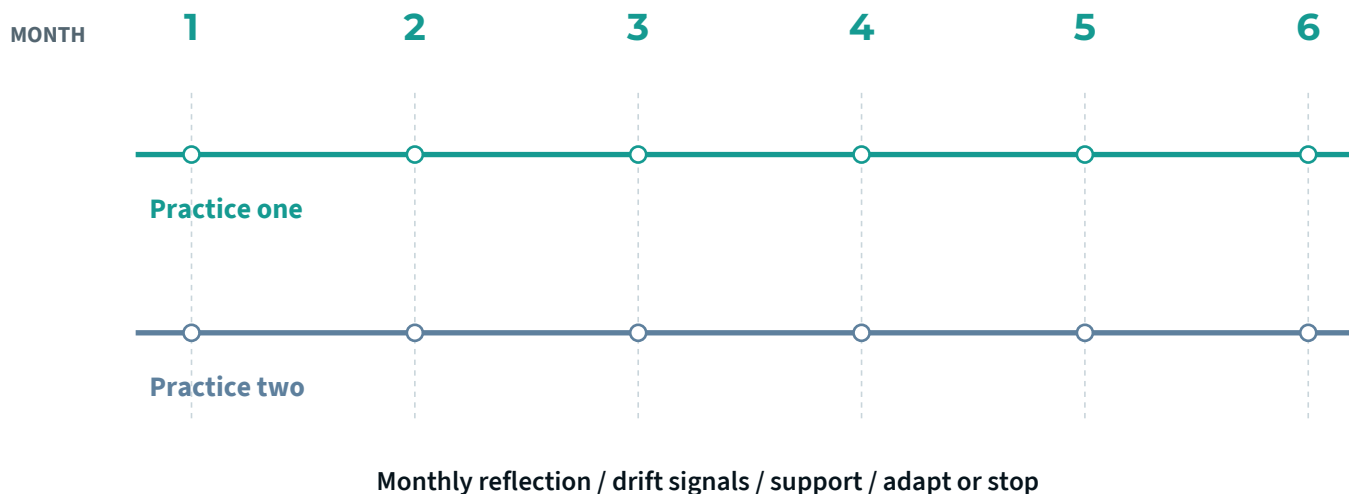
Worksheet

Example

LIVE WORKSHEET

SIX-MONTH MAINTENANCE TIMELINE

SIX-MONTH HORIZON



No more than three commitments. Continuing coaching requires a defined need, not dependency.

01 Practice one

02 Practice two

03 Drift signals

04 Self-review rhythm

05 Support and escalation

06 Six-month decision

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X71 Six-month maintenance and self-coaching plan

ACTIVITY

Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.

Guide

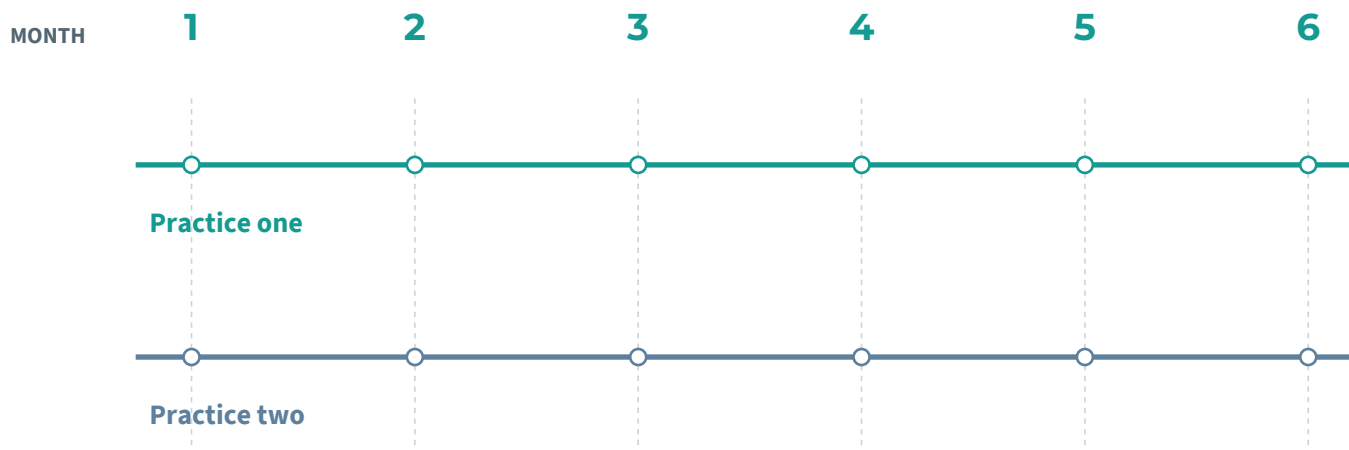
Worksheet

Example

FICTIONAL WORKED EXAMPLE

SIX-MONTH MAINTENANCE TIMELINE

SIX-MONTH HORIZON



Monthly reflection / drift signals / support / adapt or stop

No more than three commitments. Continuing coaching requires a defined need, not dependency.

01 Practice one

Use a clear decision question and concerns-first opening at material gate reviews.

02 Practice two

Agree delegation authority, checkpoints and escalation before a routine recommendation.

03 Drift signals

Repeated take-backs, late surprise concerns or a new role mandate.

04 Self-review rhythm

A 15-minute monthly review of two episodes, with a peer check-in only by mutual agreement.

05 Support and escalation

Use the sponsor for authority issues, specialists for technical gaps and coaching for a new developmental question.

06 Six-month decision

Retain useful routines, adapt those that no longer fit and seek a new engagement only for a defined need.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure
X72

ACTIVITY

Closure conversation and future letter

End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.

Practical guide

Working form

Worked example

EXCEL TAB X72 Closure conversation and fu

TIME 60 minutes; 20-minute optional letter

BRING Contract and closure terms | Goal evidence | Agreed record retention and sponsor-review boundaries

RUN THE ACTIVITY

- 01** Revisit the original purpose and how it evolved. Invite the coachee to describe what was useful, unhelpful or unfinished without requiring a positive ending.
- 02** Review learning, application and limits using evidence. Distinguish achievement of a bounded goal from a broad claim about the person or business impact.
- 03** Discuss the ending itself: independence, unresolved concerns and appropriate future support. Do not use discomfort about ending to sell an unnecessary extension.

QUESTIONS TO OPEN THINKING

What should we acknowledge that did not work?
What can you now carry without this relationship?
What exactly ends today, and what remains owned elsewhere?

CONTINUE THE METHOD

- 04** Agree the permitted sponsor summary, record retention, deletion or return arrangements and any outstanding formal responsibilities.
- 05** Invite an optional letter to the future self describing a practice to retain, a warning sign and a compassionate restart instruction. The coachee may keep it entirely private.
- 06** Close with explicit next steps and no implied ongoing availability beyond the contract. A future engagement requires a new purpose and agreement.

BOUNDARY & CAUTION

Do not promise permanent outcomes or absolute confidentiality beyond applicable duties. Resolve complaints and necessary referrals through the appropriate route, not through a celebratory ending.

BETWEEN SESSIONS / HAND-OFF

Keep the optional letter privately and revisit it at the agreed self-review point.

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

BASIS H01 / H04 / R01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X72 Closure conversation and future letter

ACTIVITY

End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Learning

02 Applied practice

Dear future me,

03 Unfinished work

04 Closure terms

06 Permitted summary

Basis: H01 / H04 / R01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X72 Closure conversation and future letter

ACTIVITY

End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Learning

M-07 can separate evidence gaps, authority issues and personal responses more clearly.

02 Applied practice

Two gate routines and a delegation checkpoint were tested with useful, bounded evidence.

Dear future me,

When pressure returns, ask what decision is needed, what evidence is missing and whose authority applies before taking over.

03 Unfinished work

The supplier dependency remains with procurement; it is not disguised as a coaching failure or success.

04 Closure terms

End the six-session engagement; retain or delete records according to the verified contract and applicable requirements.

06 Permitted summary

Share the agreed practices, support needs and limits; keep private reflections and assessment detail outside the sponsor report.

Basis: H01 / H04 / R01 | Original executive application



COMPLETE SESSION DESIGNS

From individual tools to a session.

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

S08

Midpoint review and closure design

90 minutes

Run sheet 097 / Annotated dialogue 098

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.



Midpoint review and closure design

Make a transparent decision about continuing, adapting or ending, using evidence and the agreed information boundaries.

Time	Focus	Coach action
0-15	Revisit purpose and consent	Check the original goal, changed context and what the review is authorised to discuss.
15-35	Review evidence	Examine experience, learning, application and work effects separately.
35-50	Test explanations	Identify coaching contribution, other influences, missing evidence and adverse effects.
50-65	Choose direction	Continue, adapt, stop, rematch or close, with explicit reasons and ownership.
65-80	Plan maintenance and reporting	Agree future practice, support, permitted summary and record arrangements.
80-90	Close the conversation	Invite unresolved concerns and confirm exactly what happens next.

BETWEEN-SESSION ASSIGNMENT

Complete X69 and X70 before a review where feasible. Use X71 and X72 for closure. Sponsor participation is limited to the agenda and information agreed by the coachee and other contracting parties.

PREPARATION & LIMIT

Tool route: T61-T74, X69-X72. These are original adaptable scripts. They are not an audit opinion, causal evaluation design or permission to disclose private coaching material.

Midpoint review and closure design

Make a transparent decision about continuing, adapting or ending, using evidence and the agreed information boundaries.

Speaker / coaching purpose	Illustrative dialogue
Coach / Prevents evaluation becoming a ceremonial success report.	What decision should this review help us make?
M-07 / Keeps two distinct questions.	Whether the work has been useful enough to continue, and what I can now do independently.
Coach / Tests the evidence chain.	Which evidence concerns changed behaviour, not just a useful conversation?
M-07 / Includes limits.	Two gate records and feedback show a clearer sequence. The supplier delay has not improved.
Coach / Avoids inflated attribution.	What else helped the new sequence happen?
M-07 / Names co-contributors.	Earlier evidence and the sponsor's authority clarification.
Coach / Links evidence to action.	Then what is a fair claim and a sensible next decision?
M-07 / Supports independence.	The coaching helped me practise, but the system changes mattered too. I can maintain the routine and close this goal.
Coach / Completes the information lifecycle.	What may be shared, and what remains private after we end?

DEBRIEF AND NEXT DECISION

An extension needs a defined question and purpose. Do not continue because the ending feels uncomfortable or because unused sessions remain. Resolve complaints and referrals through their proper routes.

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.

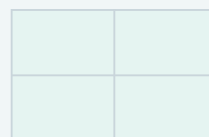
CHOOSE THE VISUAL WORKING SURFACE



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.



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
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.



Use the same words carefully.

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

Term	Working meaning
Transfer	Use and adaptation of learning in actual work.
Validation	Evidence supporting a specified interpretation and use, not a property established by a polished report.



EDITION AND RESPONSIBLE USE

Executive Coaching Framework & Toolkit

Visual Practice Edition / October 2026 / HR Delivery

Scope and source continuity

The original 606-page manual is the content and pagination master. All 160 tool identifiers are retained: T01-T88 and X01-X72. The 6A names, operating levels, enablers, quality lens, assessment companion and D6 ebook crosswalk remain intact.

Presentation revision

All 72 executive activities have redesigned working forms and matching worked examples. Fifteen core coaching tools also have redesigned forms and examples. Registers, contracts and other tools retain tabular formats when that is the useful working format.

Examples and measures

Source case examples remain fictional. Plotted positions that are not numerical source data are labelled illustrative. Wheels and personal scales are reflection aids, not validated tests, norms or predictions. No missing data are invented to make a chart look complete.

Use and professional responsibility

This is an educational and practical aid, not accreditation, clinical treatment, legal advice or technical authorisation. Use appropriate competence, consent, qualified advice and organisational processes for consequential decisions.

Source and intellectual property

Third-party model names and materials remain with their owners. Protected assessment item banks and separately licensed commercial exercise booklets are not reproduced. New visual working layouts do not alter the evidence status of a method.

Publication and privacy

The foreword remains prepared for Dr Phillip Welsh's review and approval. Keep one engagement per working copy and share only agreed outputs. Different workbook tabs are not a confidentiality boundary, and the complete workbook is not a sponsor report.

Working files and navigation

The manual has 606 pages; the coachee pack has 88. Original page references remain valid. The Excel workbook contains 183 tabs: the original 175 plus one visual index and seven additional working views. It includes seven new native charts alongside the original eight.

Access and quality boundaries

PDF text fields can be completed in a compatible reader; use its drawing tool for freehand plotting. Live numerical charts are in Excel. Cover imagery is conceptual brand artwork. Technical and visual checks are not PDF/UA certification or independent professional approval.



THE SIX-GUIDE SUITE

Six focused guides. One complete source.

All 606 pages of the Visual Practice Edition are represented across this suite. Shared foundations and references are intentionally repeated.

01

ALIGN

Charter + value hypothesis

[01_Align_Executive_Coaching_Guide.pdf](#)

140 guide pages | Core source section 27-109

02

AGREE

Four-way contract

[02_Agree_Executive_Coaching_Guide.pdf](#)

102 guide pages | Core source section 110-173

03

ASSESS

Goal + baseline + formulation

[03_Assess_Executive_Coaching_Guide.pdf](#)

154 guide pages | Core source section 174-289

04

ACTIVATE

Insight + options + commitment

[04_Activate_Executive_Coaching_Guide.pdf](#)

163 guide pages | Core source section 290-409

05

APPLY

Experiments + transfer plan

[05_Apply_Executive_Coaching_Guide.pdf](#)

115 guide pages | Core source section 410-486

06

ASSURE

Quality + value decision

[06_Assure_Executive_Coaching_Guide.pdf](#)

124 guide pages | Core source section 487-572

The ZIP includes a source-page map showing the primary guide and local page for every master page. Keep all six PDF filenames unchanged in the same folder for cross-guide links. The existing Designer Edition Excel workbook uses the same T and X tool identifiers.