

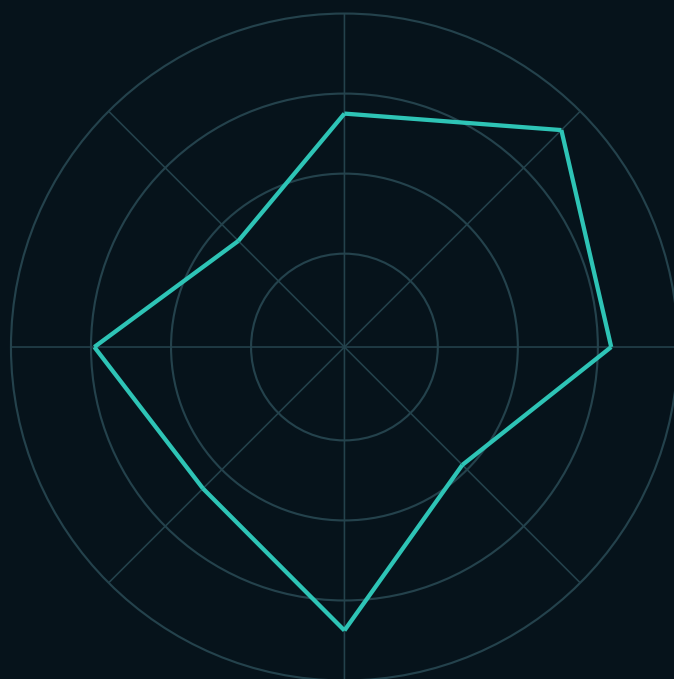
Participant Workbook

Working pages for the Additional Coaching exercises toolkit.
Use with the coach's instructions in the master.

152

activities and practice resources

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



PRACTITIONER EDITION / OCTOBER 2026

Arrive with a useful agenda

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Recent event

What matters about it

Topics I could bring

The topic I choose

Support I request

Useful session outcome

What I notice from the completed activity

What I need to check or understand better

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

The coaching working agreement

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Purpose and scope

Roles and responsibilities

Session and commercial arrangements

Confidentiality and exceptions

Data, records and technology

Review, change and closure

What I notice from the completed activity

What I need to check or understand better

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

Coaching outcomes and evidence map

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Purpose / need

Behaviour / action

Evidence / effect

Review / learning

What I notice from the completed activity

What I need to check or understand better

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

Motivation and readiness profile

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

Client code: _____

Date: _____

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

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

Ownership

Mean: ____ n: ____

Importance

Mean: ____ n: ____

Capability

Mean: ____ n: ____

Conditions

Mean: ____ n: ____

What I notice / context behind my responses

One useful next step or question to discuss

Questions worth sitting with

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Question I choose

First response

What surprises me

What I am assuming

What remains uncertain

Inquiry for the week

What I notice from the completed activity

What I need to check or understand better

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

The first-session discovery conversation

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Role and context

Reason for coaching now

Strengths and existing support

Development priorities

Working preferences and adjustments

Agreed next step

What I notice from the completed activity

What I need to check or understand better

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

Life satisfaction conversation profile

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

Client code: _____

Date: _____

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

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

What I notice / context behind my responses

One useful next step or question to discuss

The life chapter map

ASSESS • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Earlier / context

Recent evidence

Turning point

Now / implication

What I notice from the completed activity

What I need to check or understand better

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

A working vocabulary of values

ASSESS • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Value word

My definition

Behaviour that expresses it

Behaviour that contradicts it

A competing value

Decision where it matters

What I notice from the completed activity

What I need to check or understand better

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

Values into everyday choices

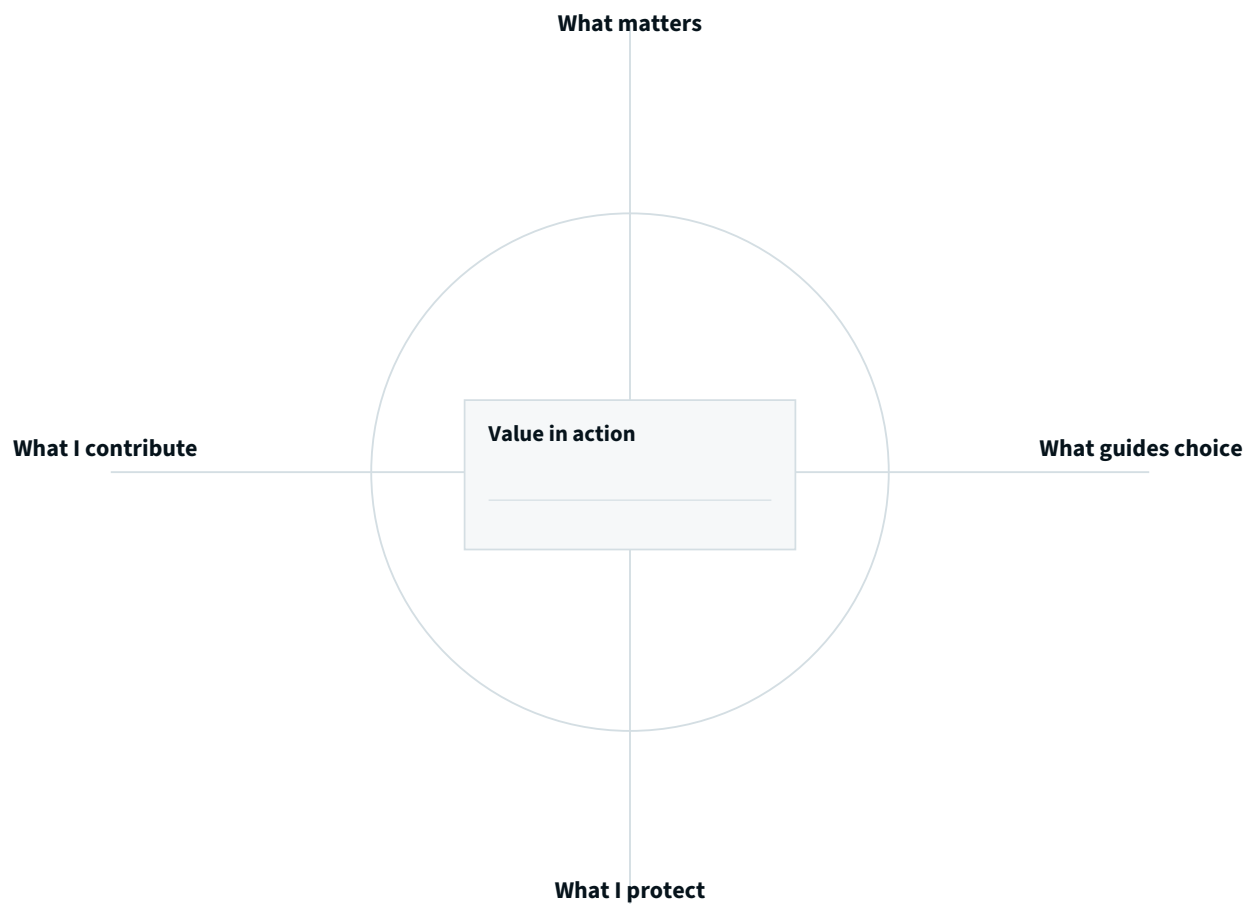
ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



What I notice from the completed activity

What I need to check or understand better

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

Meaning through an image or symbol

ASSESS • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

A moment of effective leadership

ASSESS • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

What I notice from the completed activity

What I need to check or understand better

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

The qualities you choose to carry

ASSESS • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Start broadly

Choose what matters

Make the trade-off explicit

Retain the priority

What I notice from the completed activity

What I need to check or understand better

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

A leadership purpose statement

ASSESS • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

The annual direction planner

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

The next 90 days

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
--	--

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

The long view and the next step

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Earlier / context 	Recent evidence 	
---	---	--



Turning point 	Now / implication
---	---

What I notice from the completed activity 	What I need to check or understand better
---	---

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

The goal beneath the goal

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

Stated goal

Expected benefit

Underlying need or value

Assumption to test

What I notice from the completed activity

What I need to check or understand better

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

A clear and workable goal

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Specific change

Meaning and ownership

Evidence and date

Feasibility and safeguards

What I notice from the completed activity

What I need to check or understand better

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

The later-life perspective

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

The contribution people remember

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Ending I imagine

Colleague perspective

Person I developed

Stakeholder perspective

What I notice from the completed activity

What I need to check or understand better

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

A future headline with evidence

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

Ambition without premature censorship

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Unfiltered ideas

Three that attract me

Need or value underneath

Practical constraints

Small test

Decision after the test

What I notice from the completed activity

What I need to check or understand better

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

Twenty-one goal-quality questions

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Ownership

Meaning

Definition

Evidence

Feasibility

Impact

What I notice from the completed activity

What I need to check or understand better

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

Reasons, beneficiaries and costs

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Benefits / reasons to choose

Costs / reasons to reconsider

What I notice from the completed activity

What I need to check or understand better

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

From intention to a tested commitment

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

WHEN this cue or obstacle appears...

THEN I will try this behaviour...

Because it supports...

I will review this evidence...

What I notice from the completed activity

What I need to check or understand better

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

Turn a career vision into a development route

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
--	--

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

Career values and role fit

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Define each dimension before rating. Use N/A where evidence is unavailable.

Career value



Personal meaning



Essential or preferred



Current role evidence



What I notice from the completed activity

What I need to check or understand better

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

The career development wheel

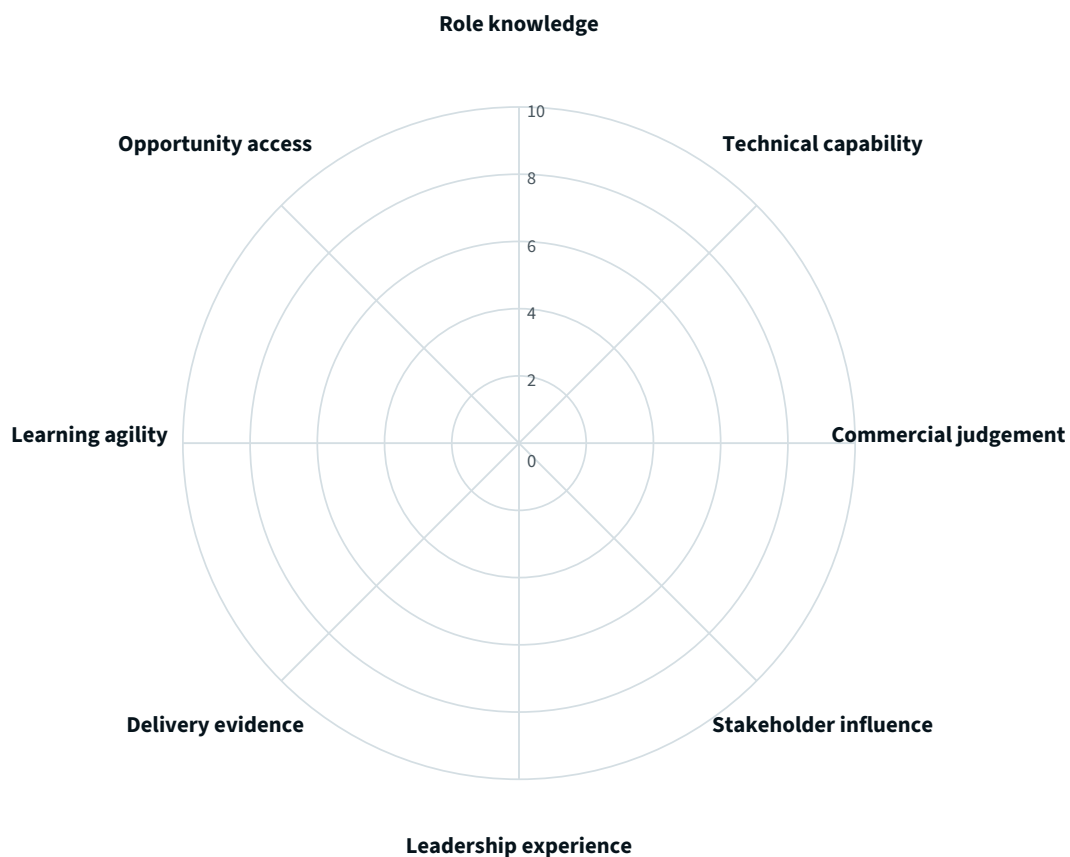
ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



Current: solid line | Desired: dashed line (optional)

Evidence behind my ratings / context

Priority / uncertainty to explore

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

Strengths with evidence and range

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Effective situation

Behaviour used

Value created

Evidence and feedback

Overuse risk

Next application

What I notice from the completed activity

What I need to check or understand better

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

Career possibilities inquiry

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Personal SWOT with evidence

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Strengths — internal

Weaknesses — internal

Opportunities — external

Threats — external

What I notice from the completed activity

What I need to check or understand better

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

Agency at work

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

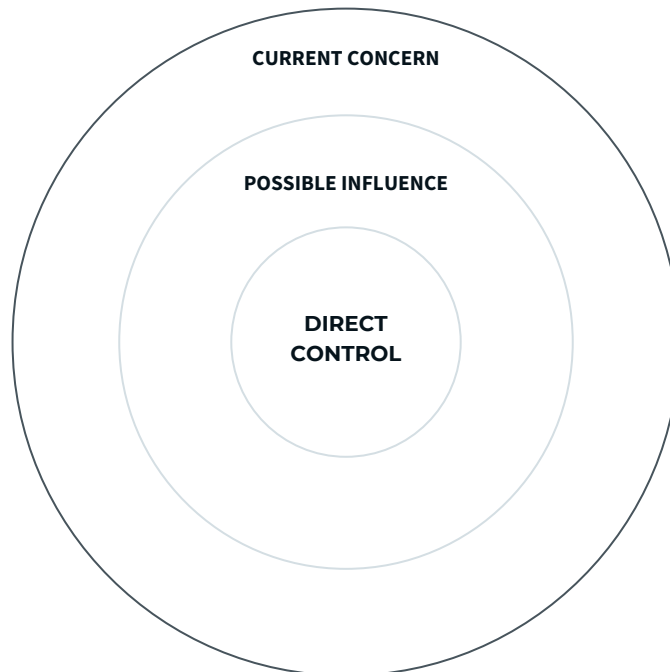
Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Place factors in the rings.
Explain why each belongs
there.
Consider what could move it.



What I notice from the completed activity

What I need to check or understand better

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

Developmental feedback from several perspectives

ASSESS / ACTIVATE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

For the agreed observation period, rate each behaviour: 0 = never observed when relevant; 1 = rarely; 2 = sometimes; 3 = often; 4 = consistently. Use N/O when you lack a relevant opportunity to observe. Add an example.

NO.	STATEMENT / QUESTION	RATING
FB1	Makes the decision and its owner clear.	
FB2	Explains the reasoning behind important changes.	
FB3	Invites relevant views before deciding.	
FB4	Listens without interrupting or dismissing concerns.	
FB5	Delegates with clear boundaries and support.	
FB6	Follows through on agreed commitments.	
FB7	Addresses difficulties respectfully and promptly.	
FB8	Uses feedback to make a visible adjustment.	

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

What I notice / context behind my responses

One useful next step or question to discuss

Manage a development gap intelligently

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Develop

Redesign / obtain help

Accept with safeguards

What I notice from the completed activity

What I need to check or understand better

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

Twenty-five strengths inquiry questions

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Question selected

Specific example

Behaviour identified

Conditions that helped

Possible strength

Next test

What I notice from the completed activity

What I need to check or understand better

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

The career history map

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Earlier / context 	Recent evidence 	
---	---	--



Turning point 	Now / implication
---	---

What I notice from the completed activity 	What I need to check or understand better
---	---

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

Map a future career landscape

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

Use initials. Add connections and label the help, expectation or agreement.

What I notice from the completed activity

What I need to check or understand better

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

An annual career development plan

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

Career year at a glance

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

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

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

The leadership practice wheel

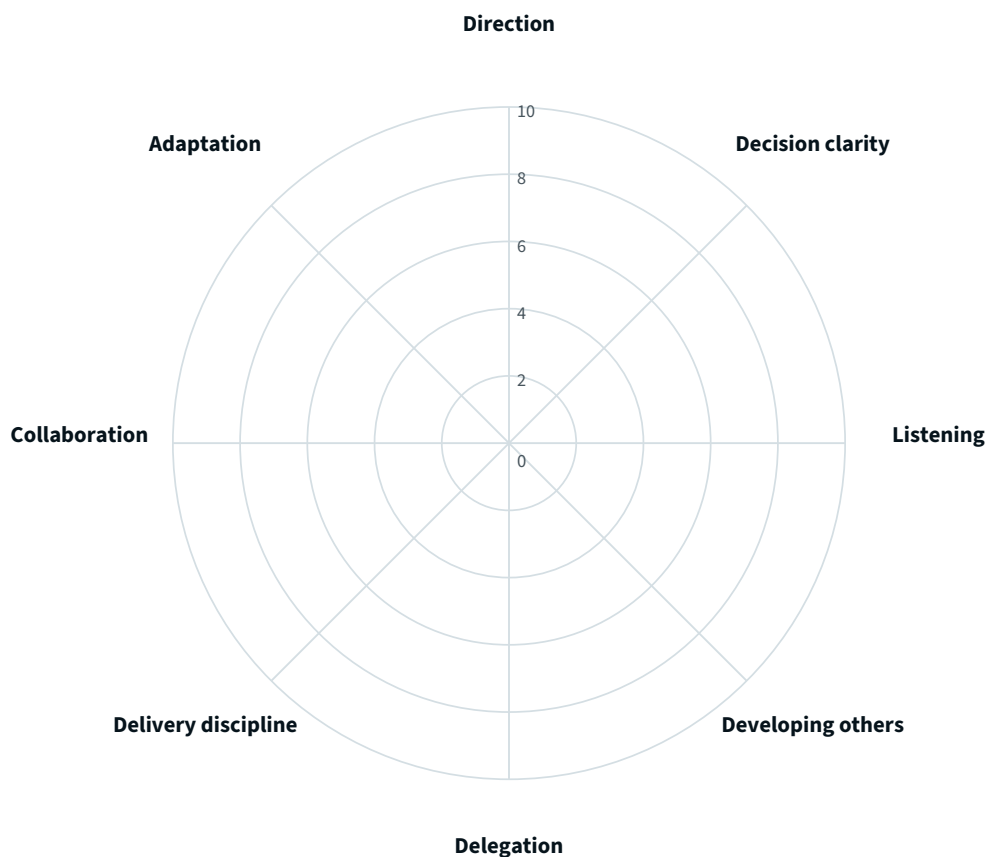
ASSESS / ACTIVATE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



Current: solid line | Desired: dashed line (optional)

Evidence behind my ratings / context

Priority / uncertainty to explore

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

Leadership presence in behaviour

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

What I notice from the completed activity

What I need to check or understand better

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

A quality expressed more deliberately

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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graph LR; A[Quality to develop] --> B[Observable behaviours]; B --> C[Non-example]; C --> D[Model or evidence]
```

Quality to develop

Observable behaviours

Non-example

Model or evidence

What I notice from the completed activity

What I need to check or understand better

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

Business SWOT for an executive decision

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Strengths — internal

Weaknesses — internal

Opportunities — external

Threats — external

What I notice from the completed activity

What I need to check or understand better

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

Make your contribution visible

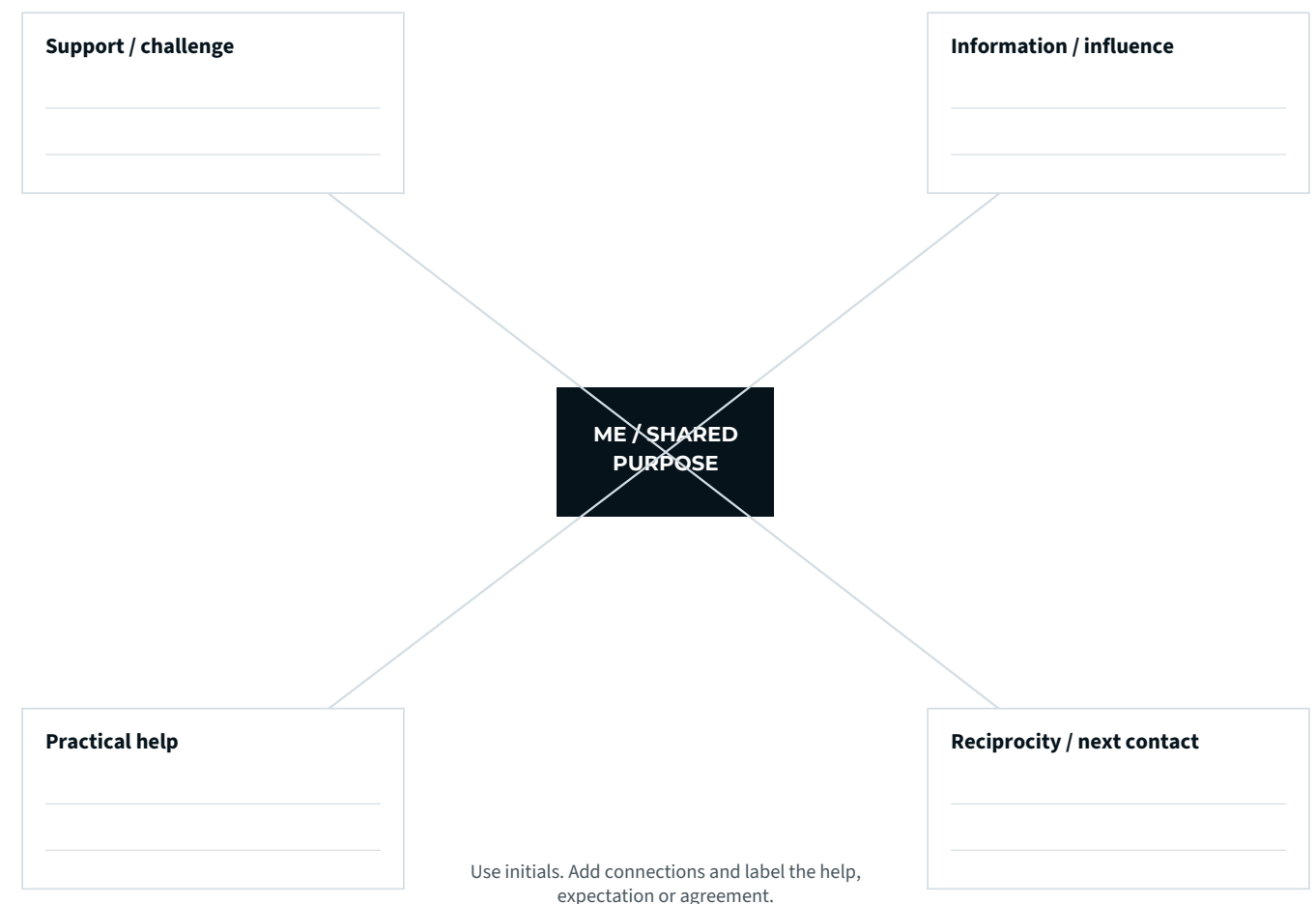
ASSESS / ACTIVATE • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



What I notice from the completed activity

What I need to check or understand better

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

Find the strengths hidden in ordinary work

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Ordinary task

What others ask of me

Behaviour they may value

Observer example

Strength hypothesis

New application

What I notice from the completed activity

What I need to check or understand better

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

Thinking patterns: a reality check

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

Client code: _____

Date: _____

- 01 Treating a complex result as complete success or total failure.
- 02 Turning one event into a rule about every future event.
- 03 Noticing only evidence that supports the worry.
- 04 Explaining away useful evidence of progress or capability.
- 05 Assuming another person's thoughts without checking.
- 06 Treating a feared future as already decided.
- 07 Jumping to the worst consequence without examining likelihood or response.
- 08 Treating a feeling as sufficient evidence of an external fact.
- 09 Using inflexible shoulds that ignore context and competing needs.
- 10 Turning a behaviour or mistake into a judgement of the whole person.

The prompt or pattern I choose to explore / what it means in this situation

Evidence, next step and review

Choose the right degree of stretch

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Choose your own anchors. A position is a reflection, not a diagnosis.

Current position



Preferred workable position



What I notice from the completed activity

What I need to check or understand better

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

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

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Put the inner critic on paper

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

Learn from a credible role model

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

What I notice from the completed activity

What I need to check or understand better

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

Four views of a decision

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

If I act: what may happen

If I act: what may not happen

If I do not act: what may happen

If I do not act: what may not happen

What I notice from the completed activity

What I need to check or understand better

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

Reframe a limitation without denying it

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / observable evidence

Interpretation / assumption

Alternative view / uncertainty

Chosen response / test

What I notice from the completed activity

What I need to check or understand better

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

Borrow a mentor's perspective

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Question

Mentor perspective one

Mentor perspective two

Advice I would give a colleague

What I notice from the completed activity

What I need to check or understand better

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

Control, influence and concern

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

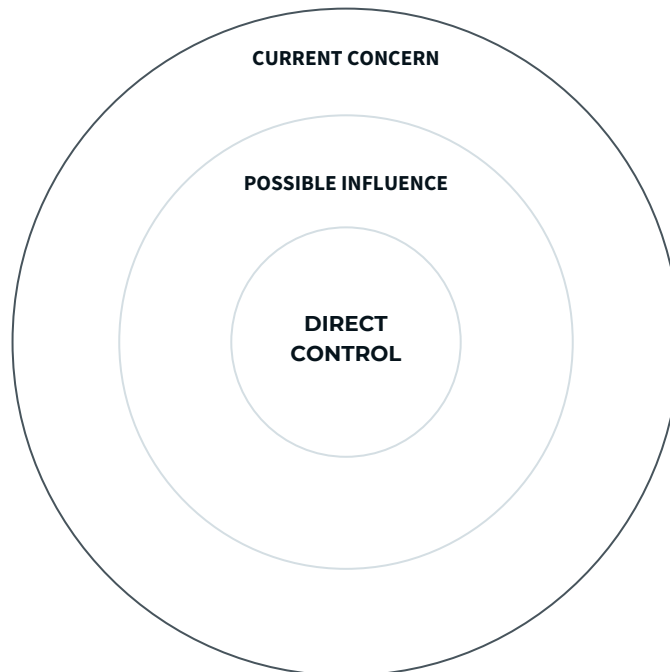
Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Place factors in the rings.
Explain why each belongs
there.
Consider what could move it.



What I notice from the completed activity

What I need to check or understand better

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

Test a limiting rule

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Question or hypothesis

Action to test

Evidence to observe

Review / adapt / stop

What I notice from the completed activity

What I need to check or understand better

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

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

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Thirty-seven questions for a fresh view

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Question selected

What I notice

Fact or assumption

New option

Information needed

Chosen next step

What I notice from the completed activity

What I need to check or understand better

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

Generate actions before choosing

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Start

Stop

Continue

Change

What I notice from the completed activity

What I need to check or understand better

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

The action and learning record

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

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Date / situation	What happened	Evidence / learning

What I notice from the completed activity

What I need to check or understand better

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

Design a small daily habit

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

When / where the cue occurs

Small observable behaviour

FOURTEEN OPPORTUNITIES — MARK ATTEMPTED, MISSED OR NOT AVAILABLE

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

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

What I notice from the completed activity

What I need to check or understand better

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

Break the large task into workable pieces

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Whole task	First part	Next action	Completion check
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

What I notice from the completed activity	What I need to check or understand better
_____	_____
_____	_____

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

Understand and interrupt procrastination

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

What I intended

What got in the way

What I can change or request

The revised experiment

What I notice from the completed activity

What I need to check or understand better

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

Take stock and choose a response

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Working: retain

Not working: change

Missing: create

Unnecessary: stop

What I notice from the completed activity

What I need to check or understand better

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

A small move out of stuckness

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

```
graph LR; A[Starting point] --> B[Next useful step]; B --> C[Evidence / milestone]; C --> D[Review / decision]
```

Starting point

Next useful step

Evidence / milestone

Review / decision

What I notice from the completed activity

What I need to check or understand better

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

Language that supports chosen action

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / observable evidence

Interpretation / assumption

Alternative view / uncertainty

Chosen response / test

What I notice from the completed activity

What I need to check or understand better

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

Build the next part of the bridge

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Current position 	Step 1 Step 2 Step 3 	Desired position
--	---	--

Supports, risks and missing pieces

What I notice from the completed activity 	What I need to check or understand better
---	---

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

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

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

From excuse language to a barrier plan

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

What I intended

What got in the way

What I can change or request

The revised experiment

What I notice from the completed activity

What I need to check or understand better

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

Find the priority that deserves today

APPLY • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Start broadly

Choose what matters

Make the trade-off explicit

Retain the priority

What I notice from the completed activity

What I need to check or understand better

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

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

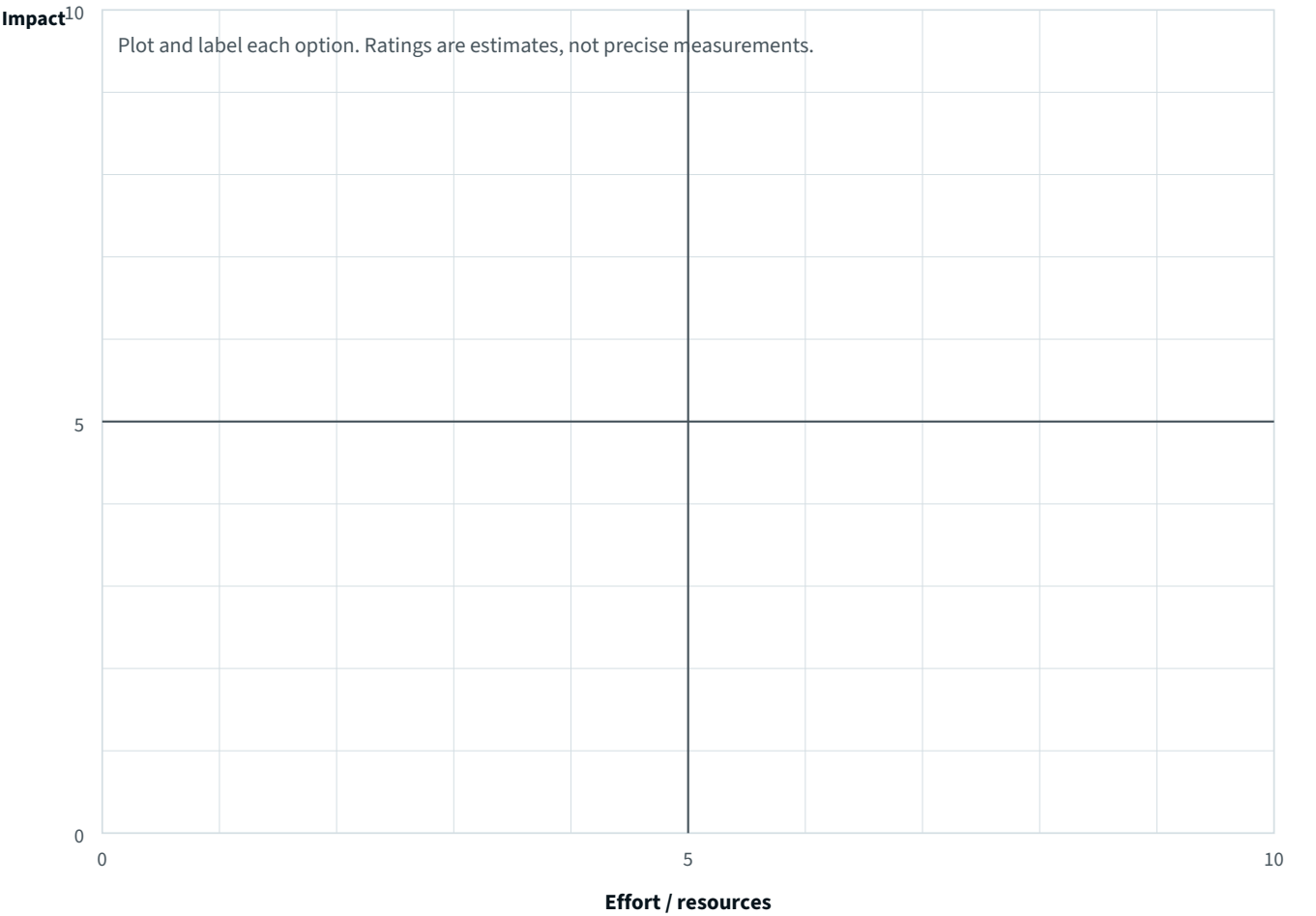
Choose actions by impact and effort

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



What I notice from the completed activity

What I need to check or understand better

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

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

See where attention really goes

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Date / situation	What happened	Evidence / learning

What I notice from the completed activity

What I need to check or understand better

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

Reduce interruptions without becoming unavailable

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
--	--

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

APPLY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

Choose what to stop, reduce or refuse

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Keep / continue

Change / simplify

Stop / resolve

What I notice from the completed activity

What I need to check or understand better

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

Distinguish urgency from importance

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Important / not urgent

Important / urgent

Less important / not urgent

Less important / urgent

What I notice from the completed activity

What I need to check or understand better

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

Delegate a result, not a vague task

APPLY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Result and quality boundary

Decision authority

Support and capacity

Checkpoints and escalation

What I notice from the completed activity

What I need to check or understand better

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

The whole-life balance wheel

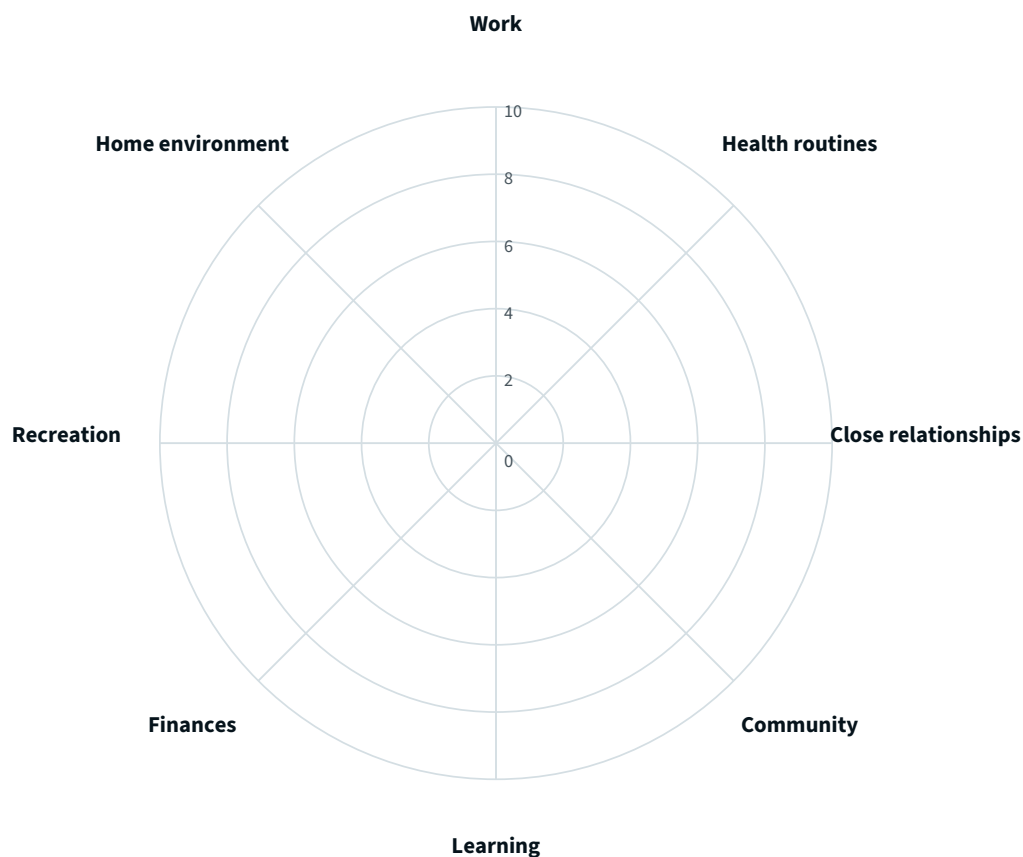
ASSESS / APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



Current: solid line | Desired: dashed line (optional)

Evidence behind my ratings / context

Priority / uncertainty to explore

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

Say no while protecting the relationship

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

What I notice from the completed activity

What I need to check or understand better

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

Review relationship patterns without labelling people

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

Use initials. Add connections and label the help, expectation or agreement.

What I notice from the completed activity

What I need to check or understand better

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

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

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Turn unmet needs into practical requests

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Need in my words

What I can do

What I will request

What I notice from the completed activity

What I need to check or understand better

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

A sustainable self-care practices review

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

Client code: _____

Date: _____

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

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

Recovery

Mean: ____ n: ____

Support

Mean: ____ n: ____

Boundaries

Mean: ____ n: ____

Practical care

Mean: ____ n: ____

What I notice / context behind my responses

One useful next step or question to discuss

Map the people who help you move forward

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

Use initials. Add connections and label the help, expectation or agreement.

What I notice from the completed activity

What I need to check or understand better

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

Redesign the work you enjoy and endure

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

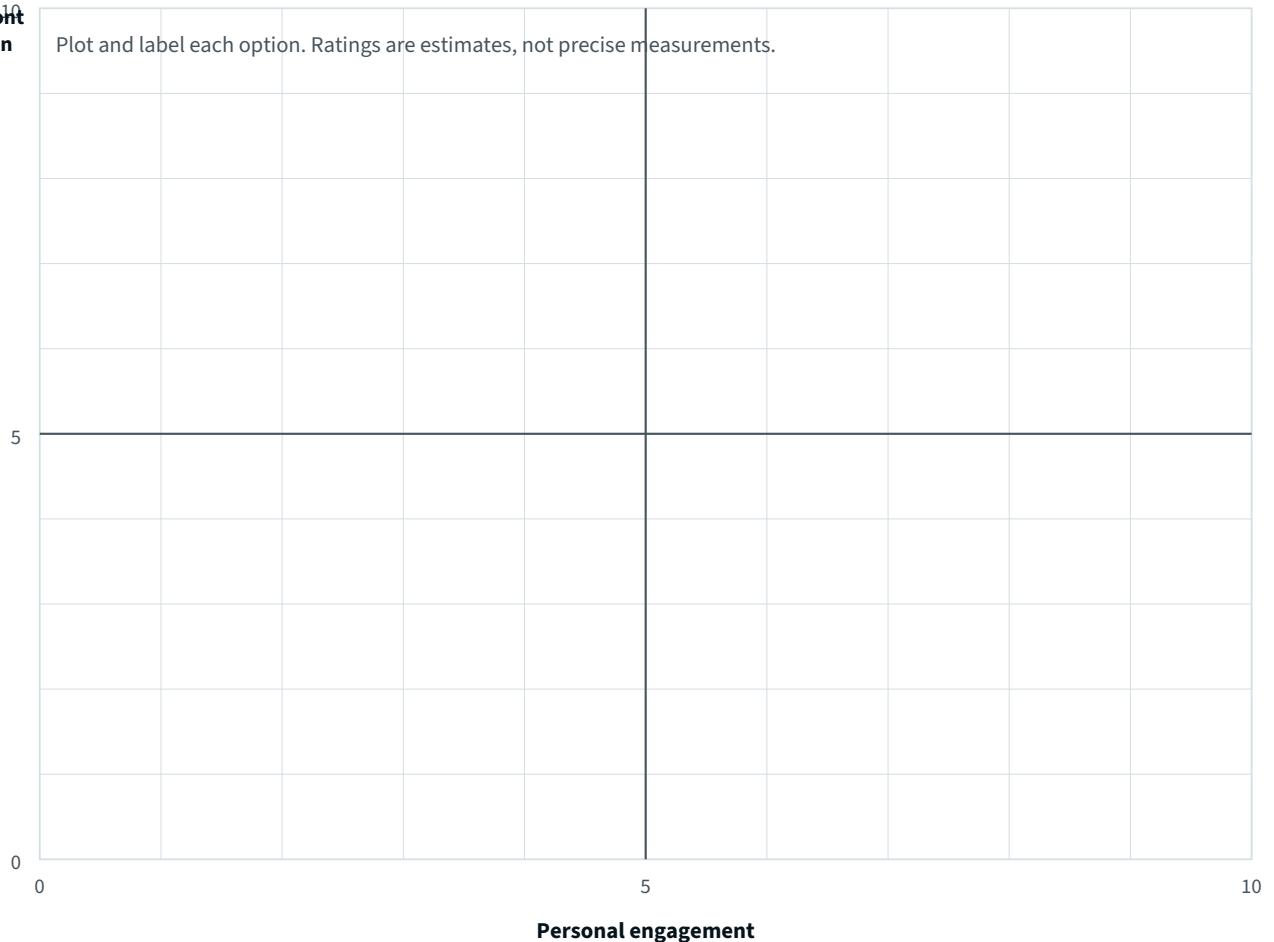
Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Role contribution



What I notice from the completed activity

What I need to check or understand better

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

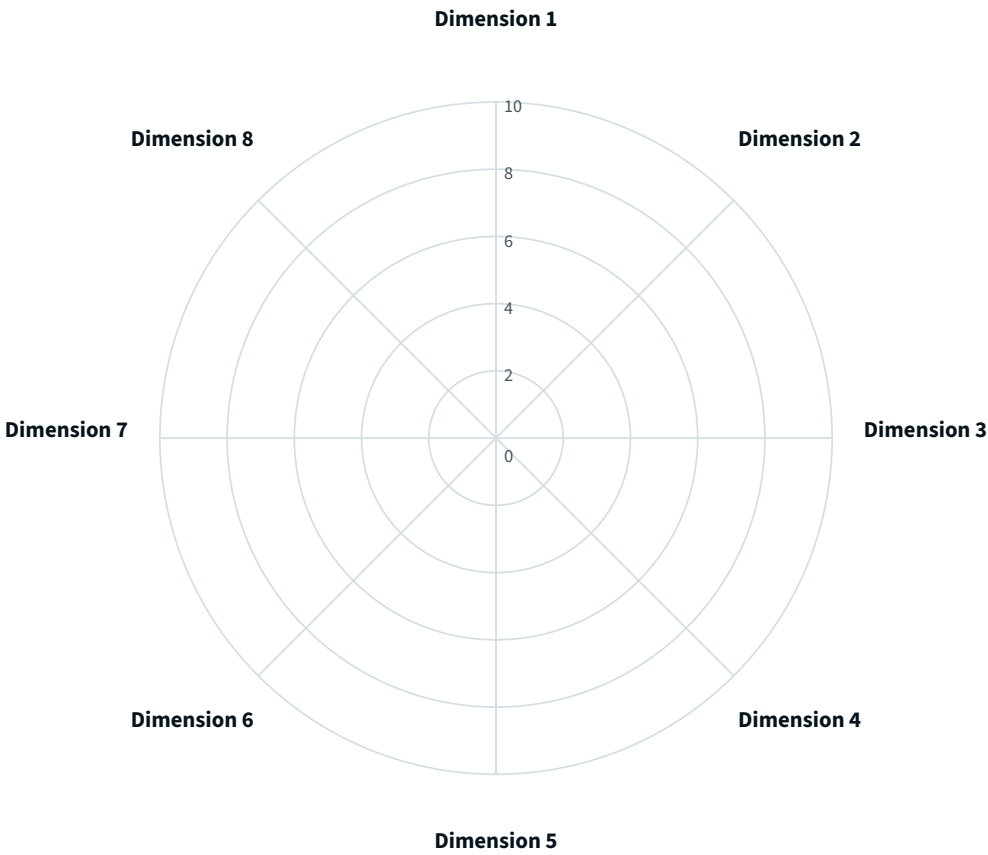
Build a wheel for the question you actually have

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

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____



Current: solid line | Desired: dashed line (optional)

Evidence behind my ratings / context _____ _____	Priority / uncertainty to explore _____ _____
--	---

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

A diary of what was worth noticing

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Date and experience

Why it mattered

Who or what contributed

My contribution

Appreciation to express

Pattern across the week

What I notice from the completed activity

What I need to check or understand better

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

Make room for what brings you alive

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Create opportunities for genuine friendship

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

Use initials. Add connections and label the help, expectation or agreement.

What I notice from the completed activity

What I need to check or understand better

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

Strengthen a working relationship deliberately

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

Use initials. Add connections and label the help, expectation or agreement.

What I notice from the completed activity

What I need to check or understand better

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

Restore useful energy at work

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Drains / demanding conditions	Restores / supportive conditions

What I notice from the completed activity

What I need to check or understand better

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

Add one source of brightness to an ordinary week

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Ordinary moment to improve

Small idea

Why it matters

Time and resources

Trial arrangement

Keep, adapt or stop

What I notice from the completed activity

What I need to check or understand better

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

Kindness as a series of chosen actions

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

Client code: _____

Date: _____

Choose or adapt the prompts with your coach. Completion is not a score. Record what you actually observe and respect other people's choices.

01

Thank someone for a specific contribution.

02

Ask what support would be useful before offering it.

03

Make space for a quieter voice in a discussion.

04

Remove a small avoidable obstacle for someone.

05

Give clear credit for another person's work.

06

Listen without immediately advising.

07

Clarify an expectation that has caused uncertainty.

08

Make a fair boundary explicit.

09

Follow through on a small promise.

The prompt or pattern I choose to explore / what it means in this situation

Evidence, next step and review

Plan a season you will be glad to have lived

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Week 1 	Week 2 	Week 3 	Week 4
Week 5 	Week 6 	Week 7 	Week 8
Week 9 	Week 10 	Week 11 	Week 12

What I notice from the completed activity 	What I need to check or understand better
---	---

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

Notice strain and choose the right response

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

What I have noticed

Context and demands

Appropriate support

Next step / earlier-help signal

What I notice from the completed activity

What I need to check or understand better

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

Five specific things to appreciate

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Experience or contribution

Why it mattered

Who or what helped

Appreciation to express

Condition to protect

Difficulty still to address

What I notice from the completed activity

What I need to check or understand better

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

Review progress without performing success

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Date / situation	What happened	Evidence / learning

What I notice from the completed activity

What I need to check or understand better

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

Close one year and choose the next

ASSURE • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Earlier / context

Recent evidence



Turning point

Now / implication

What I notice from the completed activity

What I need to check or understand better

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

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Make the learning visible at the end of a programme

ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Date / situation	What happened	Evidence / learning

What I notice from the completed activity

What I need to check or understand better

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

ASSURE • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Recognise your contribution with evidence

ASSURE • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Progress to recognise

My specific contribution

Help from others

Capability or value expressed

How to mark the progress

What to carry forward

What I notice from the completed activity

What I need to check or understand better

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

A future worth introducing

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

My professional hope

Why it matters

What I am comfortable sharing

What I heard in my partner

Shared learning theme

My session intention

What I notice from the completed activity

What I need to check or understand better

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

An animal metaphor, chosen rather than assigned

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

An unexpected professional detail

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Detail I choose to share

Why it matters

Boundary on further questions

What I learned about another person

Assumption challenged

Workplace implication

What I notice from the completed activity

What I need to check or understand better

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

The contribution others can actually see

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Observed behaviour

Situation

Helpful effect

What I recognise

What I want to clarify

Behaviour to retain

What I notice from the completed activity

What I need to check or understand better

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

Coordinate without the usual channel

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
--	--

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

A nine-square connection search

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Choose or adapt the prompts with your coach. Completion is not a score. Record what you actually observe and respect other people's choices.

01

Has learned a useful skill from a colleague.

02

Has worked across more than one function.

03

Has changed their mind after feedback.

04

Has a practical way to prepare for a difficult meeting.

05

Has helped someone settle into a new role.

06

Has simplified an unnecessary process.

07

Has worked with a geographically dispersed team.

08

Has tried a new way of learning recently.

09

Has a question they hope this workshop will help answer.

The prompt or pattern I choose to explore / what it means in this situation

Evidence, next step and review

The experience behind an unusual fact

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Earlier / context

Recent evidence



Turning point

Now / implication

What I notice from the completed activity

What I need to check or understand better

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

A message from your considered judgement

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Professional question

Unedited reflection

Sentence to examine

Evidence and uncertainty

Question to test

Next action

What I notice from the completed activity

What I need to check or understand better

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

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

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

Test the statement before taking a position

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

01 More feedback always improves performance.

02 A confident leader is necessarily a competent leader.

03 Delegating a task always saves the leader time immediately.

04 A clear goal is enough to ensure action.

The prompt or pattern I choose to explore / what it means in this situation

Evidence, next step and review

Seven words, then the meaning behind them

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

1 _____ _____	2 _____ _____	3 _____ _____	4 _____ _____	5 _____ _____	6 _____ _____	7 _____ _____
----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------

Meaning behind the words / what the short statement leaves out

What I notice from the completed activity

What I need to check or understand better

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

Turn familiar phrases into clear meaning

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Choose or adapt the prompts with your coach. Completion is not a score. Record what you actually observe and respect other people's choices.

01

We need alignment.

02

Let us take this offline.

03

We should be more strategic.

04

We need ownership.

05

Let us circle back.

06

We need a quick win.

07

This is a priority.

08

We need better communication.

09

Let us be more proactive.

The prompt or pattern I choose to explore / what it means in this situation

Evidence, next step and review

Keep the commitments moving

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
--	--

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

Replace a label with observable evidence

ACROSS THE 6A JOURNEY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

01 Resistant to change

02 Not committed

03 Too quiet to lead

04 Difficult to work with

The prompt or pattern I choose to explore / what it means in this situation

Evidence, next step and review

See the decision from another role

ACROSS THE 6A JOURNEY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Decision and stakeholder role

Known responsibilities

Possible priorities

Possible concerns

What I notice from the completed activity

What I need to check or understand better

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

Take a position, then examine the conditions

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Choose your own anchors. A position is a reflection, not a diagnosis.

Current position



Preferred workable position



What I notice from the completed activity

What I need to check or understand better

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

Write the future story with evidence

ACROSS THE 6A JOURNEY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

Listen, reflect and check

ACROSS THE 6A JOURNEY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Situation / intention

Words or behaviour to practise

Likely response / adjustment

Observer feedback / next attempt

What I notice from the completed activity

What I need to check or understand better

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

Generate options before the group commits

ACROSS THE 6A JOURNEY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Agreed outcome

Individual ideas

Grouped options

Evaluation criteria

Selected action and owner

Evidence and review

What I notice from the completed activity

What I need to check or understand better

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

Look back at the process as well as the result

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Date / situation	What happened	Evidence / learning

What I notice from the completed activity

What I need to check or understand better

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

Name the learning and its first use

ACROSS THE 6A JOURNEY • ABOUT 15 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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graph LR
    A[Starting point] --> B[Next useful step]
    B --> C[Evidence / milestone]
    C --> D[Review / decision]
  
```

Starting point

Next useful step

Evidence / milestone

Review / decision

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
---	---

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

A note to your future working self

ACROSS THE 6A JOURNEY • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Dear future me

What matters

Practice to continue

What I notice from the completed activity

What I need to check or understand better

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

Choose an attention practice safely

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

What I have noticed

Context and demands

Appropriate support

Next step / earlier-help signal

What I notice from the completed activity

What I need to check or understand better

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

A brief pause beside falling water

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Practice choice

Attention before, in my words

What I noticed

Comfort or discomfort

Attention afterwards

Preference for future use

What I notice from the completed activity

What I need to check or understand better

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

Pause at the shoreline

ASSESS / ACTIVATE • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Chosen focus

What drew my attention

What I allowed to remain

Room-based grounding cue

Observation afterwards

Usefulness for today

What I notice from the completed activity

What I need to check or understand better

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

Observe the current without entering it

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

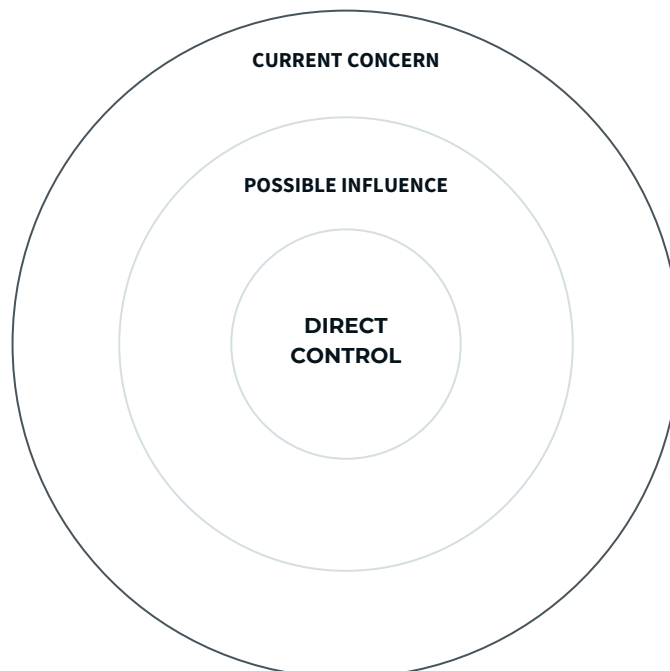
Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Place factors in the rings.
Explain why each belongs
there.
Consider what could move it.



What I notice from the completed activity

What I need to check or understand better

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

A restorative pause and a realistic next step

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Practice preference

Supportive detail I noticed

What I do not need to solve now

Need or support to acknowledge

Realistic next step

Keep, adapt or avoid

What I notice from the completed activity

What I need to check or understand better

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

A clear invitation to an introductory coaching conversation

ALIGN / AGREE / ASSURE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Recipient or audience

Provider and contact

Purpose and duration

What I notice from the completed activity

What I need to check or understand better

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

Build a referral network through genuine usefulness

ALIGN / AGREE / ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

Use initials. Add connections and label the help, expectation or agreement.

What I notice from the completed activity

What I need to check or understand better

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

A transparent coaching invoice

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

Client code: _____ Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Provider / authorised recipient

Reference / date / currency

Service / invoice reference	Quantity	Rate	Amount

Verified tax treatment / total / balance (as applicable)

What I notice from the completed activity

What I need to check or understand better

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

A receipt that confirms what was received

ALIGN / AGREE / ASSURE • ABOUT 20 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Provider / authorised recipient

Reference / date / currency

Payment reference	Date	Method	Amount received

Verified tax treatment / total / balance (as applicable)

What I notice from the completed activity

What I need to check or understand better

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

A welcome letter that prepares the client

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Client and coach

Purpose and first appointment

Optional preparation

What I notice from the completed activity

What I need to check or understand better

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

A proportionate client information record

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Preferred name and contact

Role context and time zone

Authorised sponsor or billing contact

Access and communication preferences

Agreements and permissions

Records policy and correction route

What I notice from the completed activity

What I need to check or understand better

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

An explicit newsletter choice

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Newsletter purpose and frequency

Sender and contact

Email or preferred delivery route

Unticked consent statement

Date, wording version and source

Withdrawal and privacy-information route

What I notice from the completed activity

What I need to check or understand better

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

A workshop readiness and delivery checklist

ALIGN / AGREE / ASSURE • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Purpose and success evidence

Audience and access needs

Agenda and materials

Logistics and contingency

Consent and safety checks

Follow-through and review

What I notice from the completed activity

What I need to check or understand better

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

Workshop feedback that leads to improvement

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

Client code: _____

Date: _____

Rate each statement: 1 = strongly disagree; 2 = disagree; 3 = neither agree nor disagree; 4 = agree; 5 = strongly agree. Use N/A where you cannot judge. Add what was useful and what should change.

NO.	STATEMENT / QUESTION	RATING
WF01	The purpose of the session was clear.	
WF02	The content was relevant to my work.	
WF03	The explanations and instructions were understandable.	
WF04	I had a suitable way to participate.	
WF05	The activities helped me identify a practical next step.	
WF06	The session respected different perspectives and boundaries.	

What I notice / context behind my responses

One useful next step or question to discuss

A year of useful coaching conversations

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

Explain the value and limits of coaching

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

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Purpose / need

Behaviour / action

Evidence / effect

Review / learning

What I notice from the completed activity

What I need to check or understand better

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

A transparent coaching partnership charter

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

Client code: _____

Date: _____

01 We will agree a purpose that matters to you.

02 You remain the decision-maker in your own life and work.

03 We will be clear about confidentiality and its limits.

04 I will listen carefully and check my understanding.

05 I will offer challenge respectfully and explain what I have noticed.

06 We will distinguish evidence from assumptions.

07 We will recognise strengths without ignoring difficulties.

08 You may question an exercise, decline it or suggest another approach.

09 We will turn useful insight into realistic experiments.

10 We will review progress honestly, including what has not worked.

11 I will work within my competence and discuss other support when appropriate.

12 We will adjust or end the engagement when that is the right decision.

The prompt or pattern I choose to explore / what it means in this situation

The owner's annual business direction plan

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

The business history and turning-point map

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Earlier / context 	Recent evidence 	
---	---	--



Turning point 	Now / implication
---	---

What I notice from the completed activity 	What I need to check or understand better
---	---

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

Business SWOT with a decision attached

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Strengths — internal

Weaknesses — internal

Opportunities — external

Threats — external

What I notice from the completed activity

What I need to check or understand better

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

Turn a business strength into a repeatable capability

ALIGN / ASSESS / APPLY • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Valued business outcome

Evidence of strength

People and process enablers

Dependency or fragility

Capability-building action

Reliability evidence

What I notice from the completed activity

What I need to check or understand better

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

ALIGN / ASSESS / APPLY • ABOUT 45 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

Turn a business vision into a tested route

ALIGN / ASSESS / APPLY • ABOUT 50 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

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

What I notice from the completed activity _____ _____	What I need to check or understand better _____ _____
--	--

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

A business-owner discovery conversation

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

Work through the numbered instructions with your coach. Record only what is useful and comfortable to share. Use the graphic to organise your own evidence; it is not a test.

Focus / question / goal: _____

Business and owner role

Reason for coaching now

Current evidence and challenge

Personal development need

Stakeholders and advisers

Agreed scope and evidence

What I notice from the completed activity

What I need to check or understand better

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

ALIGN / ASSESS / APPLY • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Date: _____

Focus / question / goal: _____

What I notice from the completed activity	What I need to check or understand better

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

A vocabulary for values

Choose, reject, rename or add words. The list is a prompt set, not a theory-based questionnaire or a complete account of values.

Achievement	Adventure	Authenticity
Autonomy	Balance	Belonging
Care	Clarity	Collaboration
Commitment	Community	Compassion
Competence	Contribution	Courage
Creativity	Curiosity	Dignity
Discipline	Excellence	Fairness
Family	Flexibility	Freedom
Friendship	Growth	Health
Honesty	Humility	Inclusion

My chosen words / what each means in observable behaviour

A vocabulary for values

Choose, reject, rename or add words. The list is a prompt set, not a theory-based questionnaire or a complete account of values.

Independence	Innovation	Integrity
Joy	Justice	Kindness
Learning	Loyalty	Meaning
Openness	Order	Patience
Peace	Practicality	Reliability
Respect	Responsibility	Security
Service	Simplicity	Stability
Stewardship	Sustainability	Trust
Understanding	Variety	Wellbeing
Wisdom	Add your own: _____	Add your own: _____

My chosen words / what each means in observable behaviour

Qualities for a chosen challenge

Select ten, then seven, five and three for the current challenge. Restore all the cards afterwards: priorities change; qualities are not taken away.

Attentive	Brave	Calm	Clear
Collaborative	Considerate	Consistent	Constructive
Creative	Curious	Decisive	Dependable
Determined	Fair-minded	Flexible	Generous
Honest	Imaginative	Inclusive	Independent
Methodical	Open-minded	Patient	Practical
Reflective	Respectful	Resourceful	Responsible
Steady	Thoughtful	Willing to learn	Add your own

What my choices reveal about this challenge / one quality to practise

21 questions for a well-chosen goal

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

- 01 What change do you actually want, in your own words?
- 02 Why does this matter to you now?
- 03 Whose goal is this, and what part do you personally choose?
- 04 What would be observably different if you made progress?
- 05 Who would benefit, and who might bear a cost?
- 06 What evidence describes the starting position?
- 07 Which part of the outcome is within your influence?
- 08 What important responsibility or value must be protected?
- 09 What would make the goal challenging but workable?
- 10 What capability will you need to develop?
- 11 What support or agreement is required from others?
- 12 What assumption about the situation needs checking?
- 13 What competing priority will you need to reduce or renegotiate?
- 14 What is the smallest useful milestone?
- 15 What obstacle is most likely to appear first?
- 16 When that obstacle appears, what response will you try?
- 17 What action can you take in the next seven days?
- 18 How will you distinguish activity from meaningful progress?
- 19 When will you review the goal and with what evidence?
- 20 What information would justify changing or stopping the goal?
- 21 What would make the pursuit of this goal worthwhile even if the final result differs from your expectation?

25 questions for strengths with evidence

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

- 01 When have you recently made a useful difference?
- 02 What did you actually do in that situation?
- 03 Which part of the result can reasonably be attributed to your contribution?
- 04 What would another person have observed?
- 05 What do colleagues repeatedly ask you to help with?
- 06 What difficult task has become easier through your practice?
- 07 When have you learned something faster than you expected?
- 08 What do you do reliably even when nobody is watching?
- 09 Which contribution do you dismiss because it feels ordinary to you?
- 10 What feedback have you received more than once?
- 11 What evidence supports that feedback?
- 12 In what situation does this strength work best?
- 13 What conditions help you express it?
- 14 Where does the same approach become less useful?
- 15 How might you overuse this strength under pressure?
- 16 What complementary capability would make it more effective?
- 17 Who models a more skilful version of this behaviour?
- 18 What could you learn from that person without copying their style?
- 19 Which strength is not fully used in your current role?
- 20 Where could it contribute to a real organisational need?
- 21 What would a small stretch application look like?
- 22 What support would make that stretch responsible?
- 23 How will you know whether the strength transferred to the new situation?
- 24 Who can give you specific feedback on the attempt?

25 questions for strengths with evidence

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

25 What do you now want to practise, protect or use differently?

37 questions that open a fresh view

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

- 01 What is the situation when described without a judgement?
- 02 What are you treating as certain that may still be an assumption?
- 03 What evidence would a neutral observer ask to see?
- 04 What part of the situation have you not yet asked about?
- 05 What would the other person say matters to them?
- 06 What alternative explanation deserves a fair hearing?
- 07 What are you predicting, and how likely is it really?
- 08 What would you do if the feared outcome occurred?
- 09 What has happened before that differs from the current story?
- 10 When is this problem less intense or less frequent?
- 11 What is different on those occasions?
- 12 What resource are you already using without noticing?
- 13 What part of the situation can you influence directly?
- 14 What requires agreement rather than more personal effort?
- 15 What lies outside your present authority?
- 16 What is the decision you have been postponing?
- 17 What useful discomfort might you be avoiding?
- 18 What legitimate boundary might you need to protect?
- 19 What would a fairer description of your contribution sound like?
- 20 What would you say to a respected colleague in the same position?
- 21 Which rule are you applying too rigidly?
- 22 When would that rule be useful, and when would it not?
- 23 What would change if you separated the person from the behaviour?
- 24 What are you trying to control that needs a different response?

37 questions that open a fresh view

Choose questions that fit the client's purpose. Leave thinking time; do not turn the bank into an interrogation.

- 25 What is the smallest responsible experiment available?
- 26 What would you try if the purpose were learning rather than proving yourself?
- 27 What would be enough progress for this week?
- 28 What could you stop doing to make space for that progress?
- 29 What request have you not made clearly?
- 30 Who could offer a perspective you do not currently have?
- 31 What practical support would make the next step possible?
- 32 What do you need to understand before choosing a solution?
- 33 What consequence should not be minimised?
- 34 What would tell you that specialist help is more appropriate?
- 35 What choice remains yours even if the circumstances do not improve immediately?
- 36 What evidence will you review after the next step?
- 37 What do you now see differently, and what will you do with that difference?

Motivation and readiness profile

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

Client code: _____

Date: _____

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

NO.	STATEMENT / QUESTION	RATING
01	This goal supports something that matters to me.	
02	I can explain why I personally choose this goal.	
03	I know where to obtain help with difficult parts.	
04	I can explain the cost of leaving the situation unchanged.	
05	I have room to influence how I pursue this goal.	
06	The likely benefit is worth the effort required.	
07	I would still value this change without external praise.	
08	I have enough practical time to take the next step.	
09	I have evidence that I can learn the required skill.	
10	I know the next behaviour I need to practise.	
11	I can obtain the resources needed for the next step.	
12	The people or systems involved make action possible.	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Life satisfaction conversation profile

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

Client code: _____

Date: _____

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

NO.	STATEMENT / QUESTION	RATING
01	How satisfied are you with how your current life fits what matters to you?	
02	How satisfied are you with the quality of your important relationships?	
03	How satisfied are you with opportunities to learn and develop?	
04	How satisfied are you with your opportunity to recover from demands?	
05	How satisfied are you with the practical stability needed to manage daily life?	
06	How satisfied are you with the place of non-work activities in your life?	
07	How satisfied are you with the choices available to you?	
08	How satisfied are you with the contribution your work allows you to make?	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Developmental feedback from several perspectives

ASSESS / ACTIVATE • ABOUT 60 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: _____

Date: _____

For the agreed observation period, rate each behaviour: 0 = never observed when relevant; 1 = rarely; 2 = sometimes; 3 = often; 4 = consistently. Use N/O when you lack a relevant opportunity to observe. Add an example.

NO.	STATEMENT / QUESTION	RATING
01	Makes the decision and its owner clear.	
02	Delegates with clear boundaries and support.	
03	Invites relevant views before deciding.	
04	Uses feedback to make a visible adjustment.	
05	Listens without interrupting or dismissing concerns.	
06	Addresses difficulties respectfully and promptly.	
07	Follows through on agreed commitments.	
08	Explains the reasoning behind important changes.	

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

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

A sustainable self-care practices review

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

Client code: _____

Date: _____

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

NO.	STATEMENT / QUESTION	RATING
01	I made space for everyday routines that support me.	
02	I had a realistic opportunity to pause after demanding work.	
03	I renegotiated an expectation that had become unrealistic.	
04	I protected at least one personally important commitment.	
05	I made my available capacity clear when taking on work.	
06	I could ask someone for practical help when needed.	
07	I maintained contact with people who matter to me.	
08	I could disengage from work for a period that suited my circumstances.	
09	I attended to an avoidable problem in my immediate environment.	
10	I arranged appropriate support for a practical need rather than indefinitely postponing it.	
11	I spent some time on an activity I found restorative.	
12	I had a conversation in which I felt heard.	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Workshop feedback that leads to improvement

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

Client code: _____

Date: _____

Rate each statement: 1 = strongly disagree; 2 = disagree; 3 = neither agree nor disagree; 4 = agree; 5 = strongly agree. Use N/A where you cannot judge. Add what was useful and what should change.

NO.	STATEMENT / QUESTION	RATING
01	The content was relevant to my work.	
02	The purpose of the session was clear.	
03	The activities helped me identify a practical next step.	
04	The session respected different perspectives and boundaries.	
05	I had a suitable way to participate.	
06	The explanations and instructions were understandable.	

What I notice / context behind my responses

One useful next step or question to discuss

Fixed randomised participant version. The coach's key maps positions back to the original items. There are no right answers.

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
23			
24			
25			
26			
27			
28			
29			
30			
31			
32			
33			

Fifty connection spaces

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NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
34			
35			
36			
37			
38			
39			
40			
41			
42			
43			
44			

Fifty connection spaces

Record only appropriate professional information. Fifty is a register capacity, not a target or permission to contact people.

NO.	CONNECTION / CATEGORY	MUTUAL RELEVANCE / CONTRIBUTION	CONSENT / NEXT STEP
45			
46			
47			
48			
49			
50			