HR DELIVERY
Making Sure HR Delivers

HR DELIVERY / PRACTITIONER TOOLKIT

Executive coaching

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



PURPOSE / INSIGHT / CHOICE / PRACTICE / EVIDENCE

160 tools and activities | One connected working toolkit

VISUAL PRACTICE EDITION / REBUILT FROM THE ORIGINAL / OCTOBER 2026

THE PUBLISHED 6A SYSTEM / EXECUTIVE APPLICATION MAP

Six connected responsibilities. One purposeful coaching journey.

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

01 ALIGN

ALIGN

Is coaching the right response?

OUTPUT Charter + value hypothesis

02 AGREE

AGREE

Are rights and boundaries clear?

OUTPUT Four-way contract

03 ASSESS

ASSESS

Is evidence sufficient and contextual?

OUTPUT Goal + baseline + formulation

04 ACTIVATE

ACTIVATE

Does dialogue expand agency?

OUTPUT Insight + options + commitment

05 APPLY

APPLY

Is behaviour changing in work?

OUTPUT Experiments + transfer plan

06 ASSURE

ASSURE

What should scale, adapt or stop?

OUTPUT Quality + value decision

ETHICAL | USEFUL | APPLIED | EVIDENCED

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

FRAMEWORK IN PRACTICE

The session sits inside a wider system.

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

ORGANISATION

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

PROGRAMME

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

ENGAGEMENT

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

SIX ENABLING CONDITIONS

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

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

INTRODUCTION

Executive coaching that travels into work

A toolkit for real executive work

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

Start with a question, not a battery

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

Two connected kinds of tool

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

From guide to work

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

Use professional judgement

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

A FOREWORD PREPARED FOR DR PHILLIP WELSH

Help people think. Help learning travel.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

Foreword text prepared for review and approval

The work after the conversation

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

A relationship with purpose

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

Tools should serve the person

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

Keep the distinctions visible

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

An invitation to practise

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

Approval is required before publication under his name.

HR DELIVERY / 6A WORKPLACE COACHING

CONTENTS / YOUR PRACTICAL ROUTE

Find the stage. Open the tool.

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

01 ALIGN

Charter + value hypothesis

26 tools / activities

027 >

02 AGREE

Four-way contract

19 tools / activities

110 >

03 ASSESS

Goal + baseline + formulation

28 tools / activities

174 >

04 ACTIVATE

Insight + options + commitment

38 tools / activities

290 >

05 APPLY

Experiments + transfer plan

24 tools / activities

410 >

06 ASSURE

Quality + value decision

25 tools / activities

487 >

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

MASTER TOOL INDEX

Align: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Align: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Agree: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Agree: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Assess: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Assess: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Activate: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Activate: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Activate: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Apply: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Apply: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Assure: tools to use

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

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

BEFORE YOU MOVE ON

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

MASTER TOOL INDEX

Assure: tools to use

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

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

BEFORE YOU MOVE ON

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

HOW TO USE THE TOOLKIT

Choose. Prepare. Coach. Apply.

1 / Choose the smallest useful tool

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

2 / Prepare and contract

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

3 / Guide without taking over

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

4 / Use a form suited to the work

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

5 / Debrief and transfer

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

6 / Review and close

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

CHOOSE THE VISUAL WORKING SURFACE



WHEEL



LIFELINE

PLOTTER



CHARTS

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

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

READ THIS BEFORE USING THE RECORDS

Source continuity and transparent adaptations

What is preserved

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

What is new

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

Four-way contracting clarification

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

Experience pulse clarification

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

Maturity convention selected

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

Source cases remain separate

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

RESEARCH AND PROFESSIONAL JUDGEMENT

Use evidence without overstating it

Research informs; it does not guarantee

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

Mechanism and application are different claims

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

Use more than one kind of evidence

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

Protect against a persuasive success story

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

Do not score what the tool cannot support

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

WORKING SAFELY WITH THE COMPANION FILE

One workbook. Clear information boundaries.

One engagement per working copy

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

Share selected records, not the whole file

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

Keep different purposes separate

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

Technology and AI need a fresh check

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

Save a clean master

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

THE CONNECTED TEACHING CASE

Meridian: one fictional executive journey

The source case

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

The recurring executive question

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

The initial hypothesis

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

The practical experiments

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

A separate lesson from the ebook

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

PRACTICE BOUNDARIES

Coaching and other forms of help

Coaching

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

Mentoring

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

Management and instruction

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

Qualified specialist support

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

Team and system work

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

PRACTICE BOUNDARIES

When to pause, refer or re-contract

Immediate risk

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

Significant distress or a need outside competence

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

A formal employment concern

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

A changed purpose or sponsor

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

A technology or privacy change

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

A relationship that is not useful

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

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

THE 6A WORKPLACE COACHING SYSTEM

01

Align

Purpose before provision

THE GATE

Is coaching the right response?

MINIMUM OUTPUT

Charter + value hypothesis

26 TOOLS & ACTIVITIES

Open the stage tool directory >

Align: tools to use

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

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

BEFORE YOU MOVE ON

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

Align: tools to use

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

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

BEFORE YOU MOVE ON

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

Purpose before provision

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

Start with the work

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

Test the intervention fit

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

Protect access and choice

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

Make the value hypothesis testable

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

Keep levels distinct

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

Leave with two kinds of action

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

ALIGN / OPERATING ROUTE

Choose the next useful move.

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

01

Clarify the commission

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

02

Hear the executive

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

03

Understand the transition

X03, X07 / New role and plausible future

04

Make room for practice

X04, T84 / Priority trade-off and capacity

05

Design responsible provision

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

GATE REVIEW

Is coaching the right response? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

BASIS H01-H04 | Route selection is an original editorial aid

T01

TOOL

Strategic coaching charter

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

Practical guide | Working form | Worked example

EXCEL TAB T01 Strategic coaching charter

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

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

RUN THE ACTIVITY

01 Review strategy, risk, workforce and delivery evidence; state one priority with consequence and decision horizon.

02 Identify the decisions, relationships and delivery moments where that priority is won or lost.

03 Define the knowledge, judgement and observable behaviours required in those critical work moments.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Explain how coaching could contribute, then name alternatives and system actions it cannot replace.

05 Specify population, exclusions, ownership, resources, success evidence and review decision; secure accountable approval.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.32

T01

TOOL

Strategic coaching charter

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

Practical guide | **Working form** | Worked example

EXCEL TAB T01 Strategic coaching charter

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

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

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

T01

TOOL

Strategic coaching charter

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

Practical guide | Working form | **Worked example**

EXCEL TAB T01 Strategic coaching charter

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T02

TOOL

Strategy-to-behaviour chain

Translate strategy into coachable behaviour and observable work evidence.

Practical guide | Working form | Worked example

EXCEL TAB T02 Strategytobehaviour chain

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

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

RUN THE ACTIVITY

01 Choose one strategic outcome and record the indicator or risk that makes it material.

02 Describe the workforce capability required, avoiding broad competency labels that cannot guide action.

03 Locate a recurring work moment where people must enact that capability under realistic conditions.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

CONTINUE THE METHOD

04 Write the target behaviour so an informed observer could recognise its presence or absence.

05 Classify barriers as skill, motivation, opportunity or system; assign coaching and non-coaching responses accordingly.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.35

T02 Strategy-to-behaviour chain

TOOL

Translate strategy into coachable behaviour and observable work evidence.

Guide | **Worksheet** | Example

LIVE WORKSHEET

Priority Strategic outcome

Critical capability What the workforce must be able to do

Work moment Situation where the capability is enacted

Target behaviour Observable action

Barrier Skill, motivation, opportunity or system constraint

Coaching mechanism How reflection and experiment could help

Evidence What would demonstrate movement

Basis: H01 / H04 | H04 source p.35

T02 Strategy-to-behaviour chain

TOOL

Translate strategy into coachable behaviour and observable work evidence.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Priority Strategic outcome

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

→

Critical capability What the workforce must be able to do

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

→

Work moment Situation where the capability is enacted

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

Target behaviour Observable action

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

→

Barrier Skill, motivation, opportunity or system constraint

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

→

Coaching mechanism How reflection and experiment could help

Not populated in the original worked extract.

Evidence What would demonstrate movement

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.35

T03

TOOL

Intervention fit test

Decide whether coaching is the right response.

Practical guide | Working form | Worked example

EXCEL TAB T03 Intervention fit test

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

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

RUN THE ACTIVITY

01 Define the performance or development need using behavioural and work evidence, not a requested product.

02 Test possible causes across person, role, manager, work design, relationships and wider system.

03 Compare coaching with instruction, feedback, mentoring, job redesign, formal action and qualified support routes.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Check the intended participant's agency, capacity, opportunity, expectations and psychological availability.

05 Decide coach, combine, defer or redirect; document rationale, exclusions, owner and review trigger.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.38

T03

TOOL

Intervention fit test

Decide whether coaching is the right response.

Practical guide | **Working form** | Worked example

EXCEL TAB T03 Intervention fit test

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

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

T03

TOOL

Intervention fit test

Decide whether coaching is the right response.

Practical guide | Working form | **Worked example**

EXCEL TAB T03 Intervention fit test

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T04

TOOL

Coaching portfolio map

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

Practical guide | Working form | Worked example

EXCEL TAB T04 Coaching portfolio map

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

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

RUN THE ACTIVITY

01 Inventory every coaching-labelled offer, including informal, provider, team, digital and manager pathways.

02 Record each offer's purpose, eligibility, volume, mode, duration, owner and full annual cost.

03 Compare overlap, gaps, access patterns, demand, complexity, outcomes and risk across the portfolio.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Match modes and investment to strategic need rather than grade, precedent or supplier availability.

05 Record continue, integrate, redesign, expand or stop decisions with owners and evidence dates.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.41

T04

TOOL

Coaching portfolio map

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

Practical guide | Working form | Worked example

EXCEL TAB T04 Coaching portfolio map

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

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

T04

TOOL

Coaching portfolio map

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

Practical guide | Working form | **Worked example**

EXCEL TAB T04 Coaching portfolio map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T05

TOOL

Stakeholder and power map

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

Practical guide | Working form | Worked example

EXCEL TAB T05 Stakeholder and power map

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

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

RUN THE ACTIVITY

01 List groups who decide, deliver, participate in, influence or receive information about coaching.

02 State each stakeholder's legitimate interest, concern and success criterion in their own context.

03 Assess formal, informal, information and employment power rather than relying on job title alone.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Identify confidentiality pressure, role conflict, exclusion, resistance or dependency each relationship could create.

05 Choose brief, consult, involve or govern actions; assign owner, timing, boundary and feedback route.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.44

T05

TOOL

Stakeholder and power map

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

Practical guide | **Working form** | Worked example

EXCEL TAB T05 Stakeholder and power map

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

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

T05

TOOL

Stakeholder and power map

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

Practical guide | Working form | Worked example

EXCEL TAB T05 Stakeholder and power map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T06

TOOL

Business case canvas

Secure a decision without inflated benefit claims.

Practical guide | Working form | Worked example

EXCEL TAB T06 Business case canvas

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

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

RUN THE ACTIVITY

01 Define the evidenced problem, affected work and strategic consequence; separate symptoms from causes.

02 Construct credible options including do-minimum, non-coaching interventions and combined designs.

03 Describe the proposed population, mode, dosage, enablers, exclusions and delivery assumptions.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Estimate direct, indirect and opportunity costs under low, base and high scenarios.

05 Present expected benefits, risks, uncertainty, evaluation plan and pre-agreed invest, adapt or stop decision.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.47

T06

TOOL

Business case canvas

Secure a decision without inflated benefit claims.

Practical guide | **Working form** | Worked example

EXCEL TAB T06 Business case canvas

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

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

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

T06

TOOL

Business case canvas

Secure a decision without inflated benefit claims.

Practical guide | Working form | **Worked example**

EXCEL TAB T06 Business case canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T07

TOOL

Eligibility and equity matrix

Define fair access and identify unintended exclusion.

Practical guide | Working form | Worked example

EXCEL TAB T07 Eligibility and equity matr

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

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

RUN THE ACTIVITY

01 Define each eligible population and record the need-based strategic rationale for inclusion.

02 Map nomination, application and trigger routes, including who can approve or decline entry.

03 Test every route for status, schedule, language, disability, location, technology and network barriers.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

CONTINUE THE METHOD

04 Design proportionate adjustments, choice, appeal and alternative-support routes without collecting unnecessary personal data.

05 Set access indicators and review disaggregated demand, acceptance, waiting, experience and outcome evidence.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.50

T07

TOOL

Eligibility and equity matrix

Define fair access and identify unintended exclusion.

Practical guide | Working form | Worked example

EXCEL TAB T07 Eligibility and equity matr

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

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

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

T07

TOOL

Eligibility and equity matrix

Define fair access and identify unintended exclusion.

Practical guide | Working form | **Worked example**

EXCEL TAB T07 Eligibility and equity matr

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T08

TOOL

Coaching mode decision matrix

Match delivery mode to need, complexity and risk.

Practical guide | Working form | Worked example

EXCEL TAB T08 Coaching mode decision matr

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

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

RUN THE ACTIVITY

01 Define the developmental task and distinguish learning, advice, performance, health and system needs.

02 Rate complexity using consequence, ambiguity, relationship breadth, risk and likely duration; record the rationale.

03 Set the independence needed given sponsorship, assessment, employment and commercial power.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Balance required context knowledge against impartiality, confidentiality and the risk of advice replacing coaching.

05 Select manager, internal, external, team or digital mode; specify safeguards, combination and escalation route.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

SOURCE / EDITION NOTE

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

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

BASIS H01 / H04 | H04 source p.53

T08

TOOL

Coaching mode decision matrix

Match delivery mode to need, complexity and risk.

Practical guide | Working form | Worked example

EXCEL TAB T08 Coaching mode decision matr

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

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

T08

TOOL

Coaching mode decision matrix

Match delivery mode to need, complexity and risk.

Practical guide | Working form | **Worked example**

EXCEL TAB T08 Coaching mode decision matr

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T09

TOOL

Programme theory of change

Make the expected causal chain and assumptions explicit.

Practical guide | Working form | Worked example

EXCEL TAB T09 Programme theory of change

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

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

RUN THE ACTIVITY

01 Specify people, time, budget, systems, data and enabling conditions available to the programme.

02 Describe coaching activities separately from manager, sponsor, workflow and system actions.

03 State the psychological, behavioural and contextual mechanisms expected to connect activities with change.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Sequence near, intermediate and organisational outcomes with realistic timing and observable indicators.

05 Record assumptions, alternative explanations, risks and the evidence that would support adaptation or stopping.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.56

T09

TOOL

Programme theory of change

Make the expected causal chain and assumptions explicit.

Practical guide | Working form | Worked example

EXCEL TAB T09 Programme theory of change

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

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

T09

TOOL

Programme theory of change

Make the expected causal chain and assumptions explicit.

Practical guide | Working form | **Worked example**

EXCEL TAB T09 Programme theory of change

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T10

TOOL

Coaching risk register

Identify and control programme risks before delivery.

Practical guide | Working form | Worked example

EXCEL TAB T10 Coaching risk register

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

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

RUN THE ACTIVITY

01 Write each risk as a defined event, cause and possible harm rather than a broad topic.

02 Identify affected people, rights, operations, evidence and trust, including less powerful parties.

03 Score likelihood and impact using agreed anchors; record uncertainty and existing evidence.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

CONTINUE THE METHOD

04 Assign preventive, detective and recovery controls with named owners, due dates and test methods.

05 Calculate residual exposure and set review, escalation, acceptance and pause thresholds with competent authority.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.59

T10

TOOL

Coaching risk register

Identify and control programme risks before delivery.

Practical guide | **Working form** | Worked example

EXCEL TAB T10 Coaching risk register

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

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

T10

TOOL

Coaching risk register

Identify and control programme risks before delivery.

Practical guide | Working form | **Worked example**

EXCEL TAB T10 Coaching risk register

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T11

TOOL

Governance RACI

Clarify accountability across the coaching ecosystem.

Practical guide | Working form | Worked example

EXCEL TAB T11 Governance RACI

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

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

RUN THE ACTIVITY

01 List material decisions, recurring activities, controls and exceptions across the coaching lifecycle.

02 Assign one responsible role that performs each activity and can evidence completion.

03 Name one accountable role with authority to own the result and resolve failure.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

CONTINUE THE METHOD

04 Select consulted roles whose expertise or rights must shape the decision before it is made.

05 Specify informed audiences, timing and minimum information; test gaps, conflicts and provider self-assurance.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.62

T11

TOOL

Governance RACI

Clarify accountability across the coaching ecosystem.

Practical guide | Working form | Worked example

EXCEL TAB T11 Governance RACI

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

Decision / activity	R	A	C	I	Confidentiality / conflict boundary

T11

TOOL

Governance RACI

Clarify accountability across the coaching ecosystem.

Practical guide | Working form | **Worked example**

EXCEL TAB T11 Governance RACI

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T12

TOOL

Programme readiness gate

Confirm minimum conditions for safe launch.

Practical guide | Working form | Worked example

EXCEL TAB T12 Programme readiness gate

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

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

RUN THE ACTIVITY

01 Verify the approved charter, pathway purpose, exclusions and accountable launch decision under Purpose.

02 Confirm named roles, protected capacity, supplier readiness and participant support under People.

03 Inspect coach selection, matching, contracting, supervision and service recovery evidence under Practice.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Test ethics, confidentiality, data, complaints, referral, safeguarding and incident routes under Protection.

05 Confirm baseline, evaluation, access and decision thresholds under Proof; record go, conditional go or no-go.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.65

T12

TOOL

Programme readiness gate

Confirm minimum conditions for safe launch.

Practical guide | Working form | Worked example

EXCEL TAB T12 Programme readiness gate

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

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

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

T12

TOOL

Programme readiness gate

Confirm minimum conditions for safe launch.

Practical guide | Working form | Worked example

EXCEL TAB T12 Programme readiness gate

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T75

TOOL

Service blueprint and participant journey

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

Practical guide | Working form | Worked example

EXCEL TAB T75 Service blueprint and parti

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

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

RUN THE ACTIVITY

01 Select a journey scope, participant group and material scenario to map.

02 Trace participant actions, choices, waits and access needs stage by stage.

03 Map visible communications, people, channels and service recovery beside them.

CONTINUE THE METHOD

04 Link backstage processes, systems, controls and evidence to each touchpoint.

05 Assign an owner and SLA for delivery, escalation and hand-off.

06 Test the blueprint with representative users and repair gaps before launch.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.68

T75

TOOL

Service blueprint and participant journey

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

Practical guide | Working form | Worked example

EXCEL TAB T75 Service blueprint and parti

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

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

T75

TOOL

Service blueprint and participant journey

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

Practical guide | Working form | **Worked example**

EXCEL TAB T75 Service blueprint and parti

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T76

TOOL

Coach capability framework

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

Practical guide | Working form | Worked example

EXCEL TAB T76 Coach capability framework

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

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

RUN THE ACTIVITY

01 Define each coaching role, scope, complexity and excluded activity.

02 Select capability domains evidenced by safe and effective performance.

03 Write observable foundation, practitioner and advanced anchors for every domain.

CONTINUE THE METHOD

04 Validate anchors across practice contexts, access needs and assessor interpretations.

05 Map evidence methods to selection, development, authorisation and supervision decisions.

06 Review after incidents, role change and the annual practice evidence cycle.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

BOUNDARY & CAUTION

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

COMMON ERRORS TO AVOID

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.71

T76

TOOL

Coach capability framework

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

Practical guide | Working form | Worked example

EXCEL TAB T76 Coach capability framework

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

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

T76

TOOL

Coach capability framework

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

Practical guide | Working form | **Worked example**

EXCEL TAB T76 Coach capability framework

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T81

TOOL

Provider RFP and due-diligence scorecard

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

Practical guide | Working form | Worked example

EXCEL TAB T81 Provider RFP and duediligen

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

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

RUN THE ACTIVITY

01 Translate the use case and risk profile into weighted, testable requirements.

02 Set mandatory ethics, competence, data, accessibility and incident-cooperation gates.

03 Specify acceptable evidence, demonstrations, scenarios and reference checks.

CONTINUE THE METHOD

04 Score independently, calibrate assessors and document every clarification.

05 Complete specialist due diligence and convert residual risk into contract conditions.

06 Select on evidence-weighted value, preserving review, audit and exit rights.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.74

T81

TOOL

Provider RFP and due-diligence scorecard

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

Practical guide | Working form | Worked example

EXCEL TAB T81 Provider RFP and duediligen

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

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

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

T81

TOOL

Provider RFP and due-diligence scorecard

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

Practical guide | Working form | **Worked example**

EXCEL TAB T81 Provider RFP and duediligen

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T82

TOOL

Implementation workplan and milestone tracker

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

Practical guide | Working form | Worked example

EXCEL TAB T82 Implementation workplan and

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

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

RUN THE ACTIVITY

01 Break implementation into accountable workstreams and evidence-based milestones.

02 Assign one owner, realistic start and due date to each milestone.

03 Map dependencies, decision gates and the evidence required for completion.

CONTINUE THE METHOD

04 Update status from verifiable progress, not percentage estimates alone.

05 Trigger recovery action when a dependency, date or quality gate slips.

06 Review weekly and escalate decisions beyond the workstream owner's authority.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

BOUNDARY & CAUTION

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

COMMON ERRORS TO AVOID

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.77

T82

TOOL

Implementation workplan and milestone tracker

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

Practical guide | Working form | Worked example

EXCEL TAB T82 Implementation workplan and

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

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

T82

TOOL

Implementation workplan and milestone tracker

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

Practical guide | Working form | Worked example

EXCEL TAB T82 Implementation workplan and

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T83

TOOL

Communications and stakeholder plan

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

Practical guide | Working form | Worked example

EXCEL TAB T83 Communications and stakehol

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

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

RUN THE ACTIVITY

01 Map each audience's role, power, likely concern and information need.

02 Write accurate messages covering purpose, choice, boundaries and support.

03 Choose accessible channels and timing appropriate to the audience's decision.

CONTINUE THE METHOD

04 Assign content owner, specialist approvers and publication authority.

05 Provide a question, feedback and correction route in every major communication.

06 Test comprehension with representatives and revise after material change.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

BOUNDARY & CAUTION

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

COMMON ERRORS TO AVOID

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.80

T83

TOOL

Communications and stakeholder plan

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

Practical guide | **Working form** | Worked example

EXCEL TAB T83 Communications and stakehol

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

Audience	Need / concern	Message	Channel / timing	Owner / approver	Feedback route	Evide nce

T83

TOOL

Communications and stakeholder plan

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

Practical guide | Working form | **Worked example**

EXCEL TAB T83 Communications and stakehol

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T84

TOOL

Capacity, budget and demand model

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

Practical guide | Working form | Worked example

EXCEL TAB T84 Capacity budget and demand

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

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

RUN THE ACTIVITY

01 Forecast eligible population, interest, conversion and starts in three scenarios.

02 Define each pathway's sessions, duration, rematch and transfer requirements.

03 Calculate usable coach capacity after utilisation, leave and contingency.

CONTINUE THE METHOD

04 Build full unit and portfolio cost from auditable assumptions.

05 Model matching wait, supervision, operations and access constraints under pressure.

06 Set demand triggers for added capacity, prioritisation, delay or scope change.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.83

T84

TOOL

Capacity, budget and demand model

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

Practical guide | **Working form** | Worked example

EXCEL TAB T84 Capacity budget and demand

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

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

T84

TOOL

Capacity, budget and demand model

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

Practical guide | Working form | Worked example

EXCEL TAB T84 Capacity budget and demand

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

X01

ACTIVITY

Executive role mandate

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

Practical guide | Working form | Worked example

EXCEL TAB X01 Executive role mandate

TIME 45 minutes together; 20 minutes preparation

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

RUN THE ACTIVITY

01 Invite the executive to describe why the role exists without reciting its job description. Record the business or public-service outcome, whose experience matters and what would be lost without the role.

02 Draw three columns: accountable outcomes, decisions owned, and dependencies. Place each recent decision in the columns and identify any ambiguity about authority rather than interpreting it as lack of confidence.

03 Compare the formal mandate with expectations from the sponsor, peers and direct reports. Mark each expectation as confirmed, inferred or disputed, retaining differences rather than forcing agreement.

QUESTIONS TO OPEN THINKING

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

Which expectation have you accepted without checking?

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

CONTINUE THE METHOD

04 Identify the few moments in which leadership behaviour matters most: a gate review, a delegation conversation or a cross-functional trade-off. Describe an observable action, not a personality quality.

05 Choose one coachable focus and one organisational clarification. Agree who can clarify the latter; the coach must not quietly become the executive's proxy negotiator.

06 Ask the coachee to explain the revised mandate in two minutes. Capture the one question to take to the sponsor and the practice to explore in Assess.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 | Original executive application

X01 Executive role mandate

ACTIVITY

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

Guide **Worksheet** Example LIVE WORKSHEET

01 Purpose of the role

02 Accountable outcomes

03 Decisions and boundaries

05 Unconfirmed expectations

04 Expected leadership moments

06 Coaching focus and next step

Basis: H01 | Original executive application

X01 Executive role mandate

ACTIVITY

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

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

01 Purpose of the role

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

02 Accountable outcomes

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

03 Decisions and boundaries

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

05 Unconfirmed expectations

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

04 Expected leadership moments

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

06 Coaching focus and next step

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

Basis: H01 | Original executive application

X02

ACTIVITY

Leadership impact compass

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

Practical guide | Working form | Worked example

EXCEL TAB X02 Leadership impact compass

TIME 40 minutes

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

RUN THE ACTIVITY

01 Ask the coachee to name a situation that matters within the next eight weeks. Define who would notice a useful difference and what they would see or hear.

02 Use the four areas as prompts, not dimensions of a test. Describe desired impact in each area and identify tensions, such as speed versus participation.

03 Put available evidence beside each claim. An intention belongs in a separate box from a stakeholder's reported experience or a work record.

CONTINUE THE METHOD

04 Select the impact with the strongest combination of relevance and scope for action. Discuss what must be protected while it changes; do not encourage the executive to maximise all four areas.

05 Translate the selected impact into one behaviour under the executive's control. Agree what useful support or permission is required from others.

06 State a provisional value hypothesis and its uncertainty. Link the behavioural focus to a baseline tool and an agreed review date.

QUESTIONS TO OPEN THINKING

Who would experience a difference if this worked?

What could improve locally but become worse elsewhere?

What would count as enough progress to keep learning?

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 | Original executive application

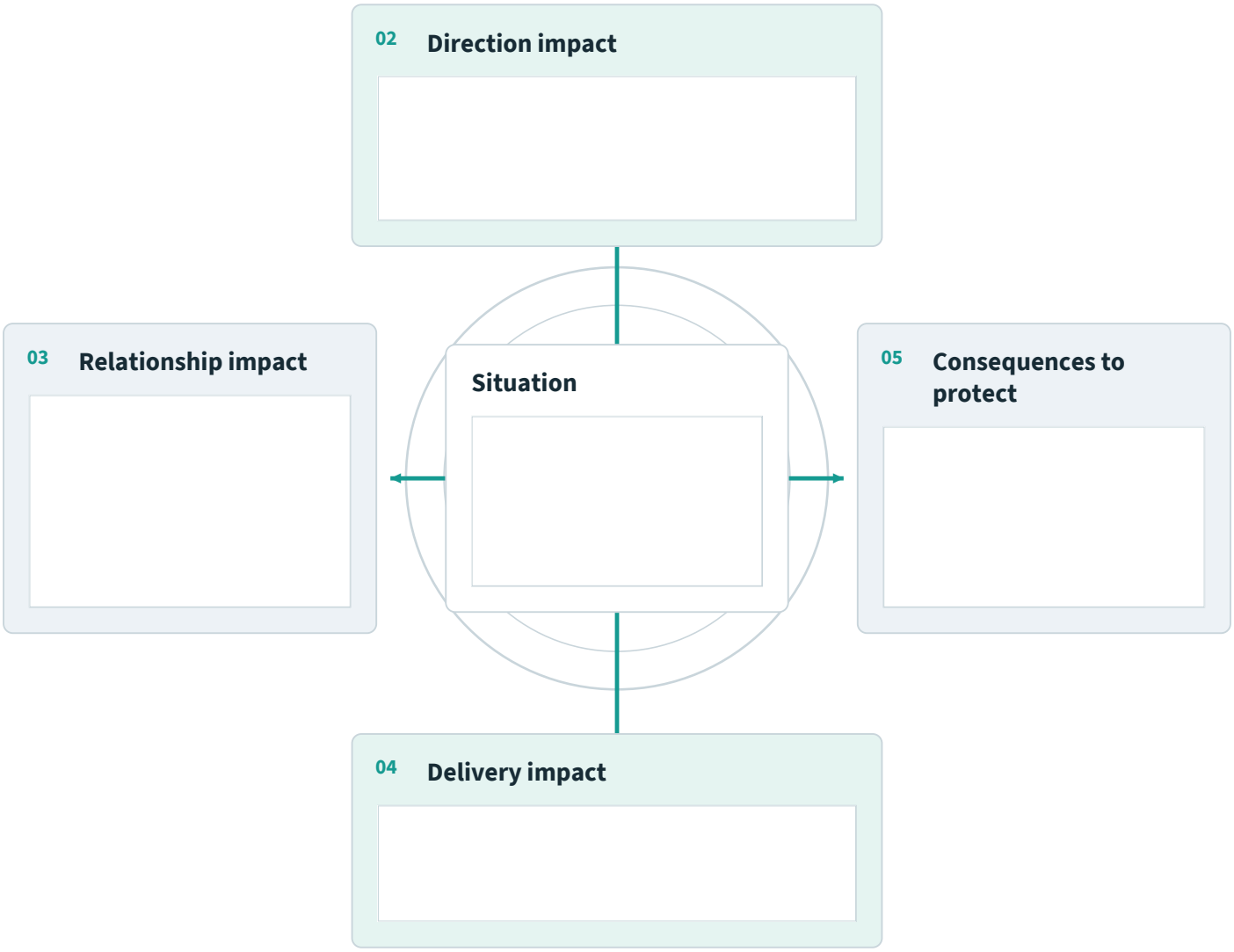
X02 Leadership impact compass

ACTIVITY

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

Guide | **Worksheet** | Example

LIVE WORKSHEET



06 Chosen focus and evidence

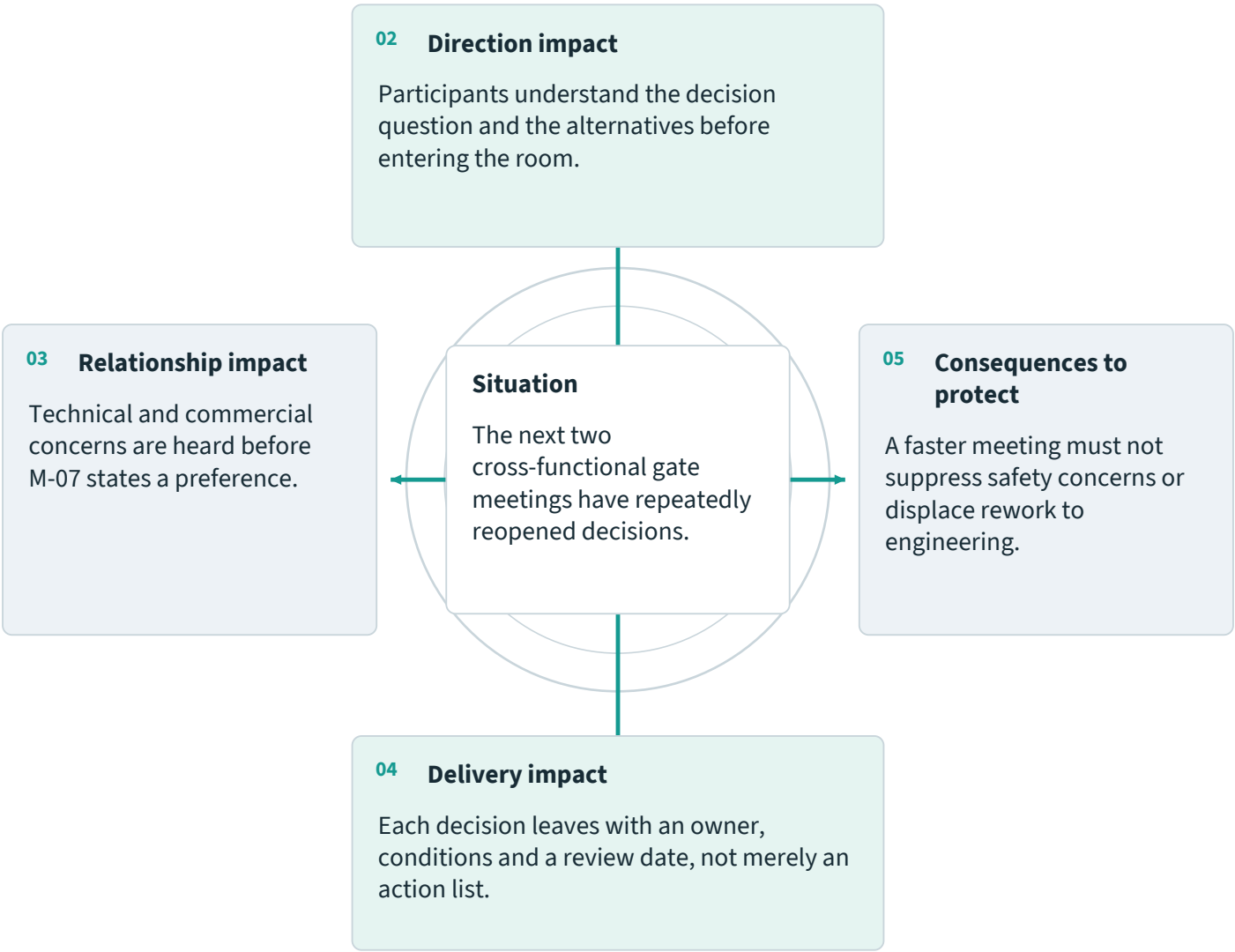
Basis: H01 | Original executive application

X02 Leadership impact compass

ACTIVITY

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

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE



06 Chosen focus and evidence

Trial a two-page decision brief and a concerns-first opening; review the decision record and consented colleague feedback after two meetings.

Basis: H01 | Original executive application

X03

ACTIVITY

Role-transition bridge

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

Practical guide | Working form | Worked example

EXCEL TAB X03 Roletransition bridge

TIME 50 minutes; 15 minutes independent reflection

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

RUN THE ACTIVITY

01 Draw the previous role on one side and the new role on the other. Invite the coachee to describe the differences in decisions, time horizon and relationships.

02 Ask which habits earned success previously. For each, examine where it still helps and where its unmodified use could create a bottleneck.

03 Identify losses as well as opportunities: expertise, peer membership, certainty or visibility. Give the coachee permission to keep this discussion work-focused and decline personal exploration.

QUESTIONS TO OPEN THINKING

What made you successful that now needs a different dosage?

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

Which new responsibility needs practice rather than confidence talk?

CONTINUE THE METHOD

04 Map the new contribution onto three categories: retain deliberately, stop or reduce, and practise. Require a concrete example in each category.

05 Choose one safe transition experiment and one expectation to renegotiate. Agree who needs to know; avoid making the former team responsible for the leader's adjustment.

06 Write a 30-day bridge statement and a review question. Revisit it when the role changes rather than treating it as a fixed identity.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 | Original executive application

X03 Role-transition bridge

ACTIVITY

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

Guide **Worksheet** Example LIVE WORKSHEET

01 Previous success pattern

02 New mandate



03 Retain deliberately

04 Reduce or release

05 New practice

06 Thirty-day bridge

Basis: H01 | Original executive application

X03 Role-transition bridge

ACTIVITY

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

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

01 Previous success pattern

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

02 New mandate

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



03 Retain deliberately

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

04 Reduce or release

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

05 New practice

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

06 Thirty-day bridge

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

Basis: H01 | Original executive application

X04

ACTIVITY

Priority and opportunity-cost review

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

Practical guide | Working form | Worked example

EXCEL TAB X04 Priority and opportunitycos

TIME 35 minutes

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

RUN THE ACTIVITY

01 Ask the coachee to list no more than six plausible coaching themes. Give each a real work example so broad labels such as presence do not dominate the conversation.

02 For each theme, discuss why it matters now, what it could enable and what would happen if work on it were deferred. Do not manufacture urgency.

03 Estimate the practice effort and the opportunity it would displace. Distinguish protected time from time the executive hopes will appear.

QUESTIONS TO OPEN THINKING

What will you stop doing to make this possible?

Which attractive theme is not the most useful one now?

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

CONTINUE THE METHOD

04 Identify dependencies. A theme that requires a new decision right or a repaired system may need parallel management action before coaching can help.

05 Select one primary focus and at most one supporting focus. Place the remaining themes in a deliberate not-now list, with a trigger for reconsidering them.

06 Agree what will stop, shrink or move to create practice time. Confirm the decision in the coachee's words and update the engagement goal.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 | Original executive application

X04 Priority and opportunity-cost review

ACTIVITY

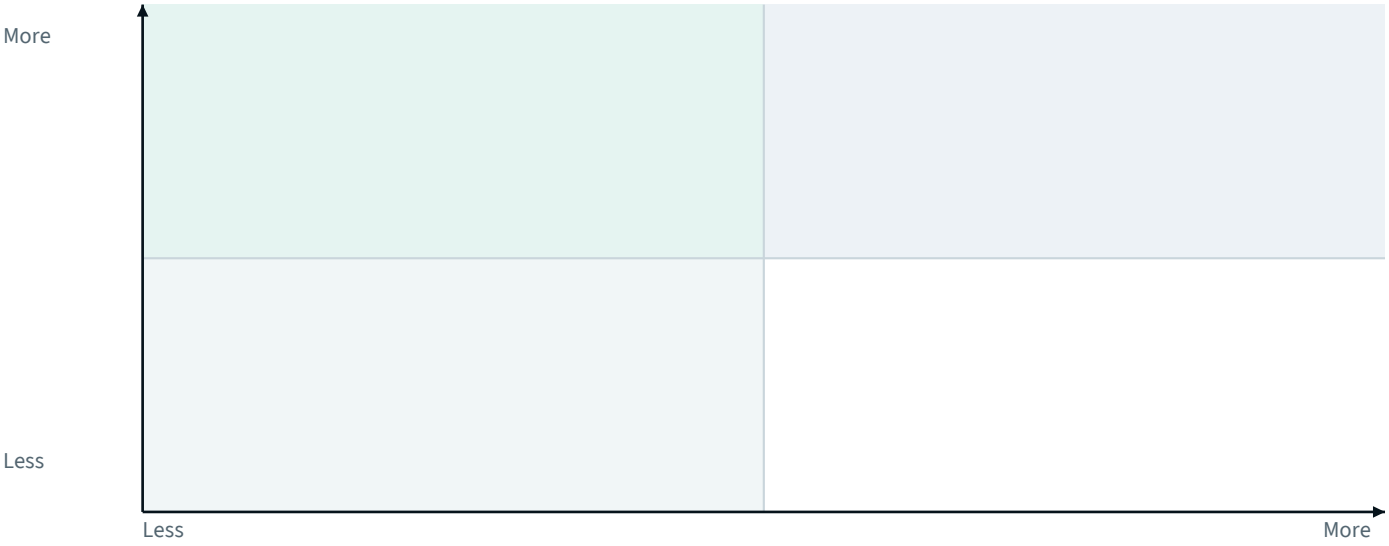
Choose what coaching will address by making competing priorities, effort and the cost of adding another commitment visible.

Guide | **Worksheet** | Example

LIVE WORKSHEET

PRIORITY / EFFORT PLOTTER

Contribution now



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

01 Candidate themes

02 Priority selected

03 Supporting theme

04 Effort and displacement

05 Dependencies

06 Not-now and trigger

Basis: H01 | Original executive application

X04 Priority and opportunity-cost review

ACTIVITY

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

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

PRIORITY / EFFORT PLOTTER

Contribution now



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

01 Candidate themes

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

02 Priority selected

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

03 Supporting theme

Delegation of evidence preparation supports better challenge in those meetings.

04 Effort and displacement

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

05 Dependencies

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

06 Not-now and trigger

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

Basis: H01 | Original executive application

X05

ACTIVITY

Purpose, values and leadership choices

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

Practical guide | Working form | Worked example

EXCEL TAB X05 Purpose values and leadersh

TIME 50 minutes

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

RUN THE ACTIVITY

01 Invite two stories: one in which work felt worthwhile and one in which a choice felt wrong. Ask for the situation and behaviour before asking for abstract values.

02 Offer provisional value words only after listening, and ask the coachee to accept, rename or reject them. Separate organisational slogans from personally endorsed meanings.

03 Select three values and define each through a behaviour. For example, fairness might involve explaining criteria rather than treating every request identically.

QUESTIONS TO OPEN THINKING

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

Which two values are pulling in different directions?

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

CONTINUE THE METHOD

04 Explore a current trade-off between two legitimate values. Ask what each protects, who is affected and what the executive can realistically influence.

05 Choose a values-consistent action and an explicit constraint. Where law, safety or organisational policy applies, obtain proper advice instead of treating values as permission to bypass it.

06 Record a short purpose statement and the next work choice through which it will be tested. Review the consequences rather than judging whether the statement sounds inspiring.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / R21 | Original executive application

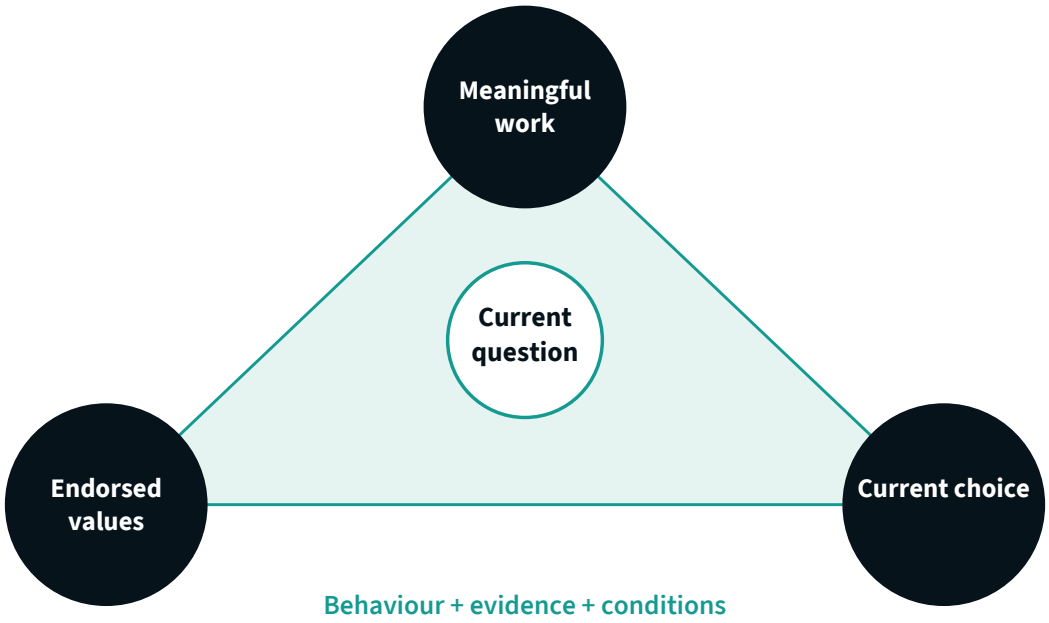
X05 Purpose, values and leadership choices

ACTIVITY

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

Guide **Worksheet** Example LIVE WORKSHEET

VALUES AND CHOICE TRIANGLE



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

01 Meaningful episode

02 Value and definition

03 Second value

04 Current tension

05 Chosen action

06 Purpose in practice

Basis: H01 / R21 | Original executive application

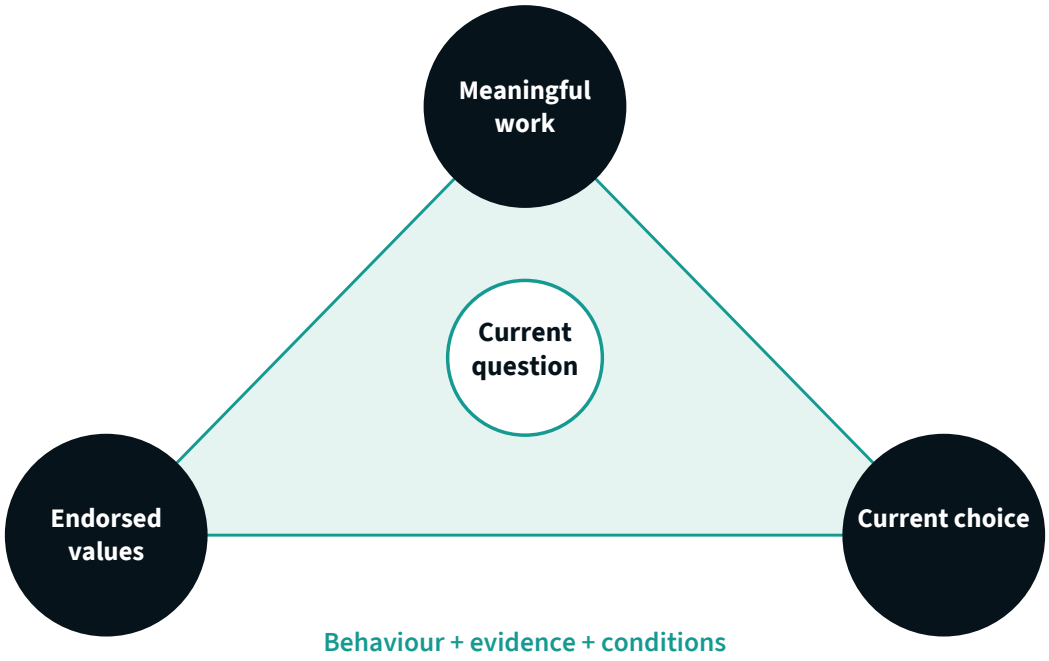
X05 Purpose, values and leadership choices

ACTIVITY

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

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

VALUES AND CHOICE TRIANGLE



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

01 Meaningful episode

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

02 Value and definition

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

03 Second value

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

04 Current tension

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

05 Chosen action

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

06 Purpose in practice

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

Basis: H01 / R21 | Original executive application

X06

ACTIVITY

Stakeholder value interview

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

Practical guide | Working form | Worked example

EXCEL TAB X06 Stakeholder value interview

TIME 45 minutes preparation; three 15-minute interviews

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

RUN THE ACTIVITY

01 Agree with the coachee whether interviews are led by them or the coach. Explain that the exercise is developmental, not a hidden performance investigation.

02 Select people who see different parts of the work, including a less powerful voice. Do not promise anonymity when a small set or role detail makes identification likely.

03 Open each interview with the purpose, voluntary participation and intended use. Ask: what contribution matters most, where has it helped recently, and what would a useful difference look like?

QUESTIONS TO OPEN THINKING

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

When has this already worked well?

What support from your side would make the difference easier?

CONTINUE THE METHOD

04 Probe for one concrete episode and the conditions around it. Ask what the stakeholder or system could do differently as well, so all responsibility is not placed on the executive.

05 Summarise back and confirm what may be shared. Keep disagreement and alternative explanations visible; do not turn three conversations into a representative survey.

06 Debrief patterns with the coachee, checking emotional readiness. Choose one hypothesis to test and thank contributors without disclosing anyone else's comments.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 | Original executive application

X06 Stakeholder value interview

ACTIVITY

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

STAKEHOLDER LISTENING CARDS

01

Ask for an episode

02

Listen without filling gaps

03

Check meaning

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 Interview purpose

02 Participants and permissions

03 Core questions

04 Pattern found

05 Alternative explanation

06 Next experiment

Basis: H01 | Original executive application

X06 Stakeholder value interview

ACTIVITY

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

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

STAKEHOLDER LISTENING CARDS

01 **Ask for an episode**

02 **Listen without filling gaps**

03 **Check meaning**

What mattered? → What happened? → What else explains it?

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 Interview purpose

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

02 Participants and permissions

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

03 Core questions

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

04 Pattern found

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

05 Alternative explanation

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

06 Next experiment

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

Basis: H01 | Original executive application

X07

ACTIVITY

Twelve-month future story

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

Practical guide | Working form | Worked example

EXCEL TAB X07 Twelvemonth future story

TIME 45 minutes

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

RUN THE ACTIVITY

01 Invite the coachee to describe an ordinary working day twelve months from now in which the development has been useful. Avoid an idealised world with no constraints.

02 Ask what colleagues would notice in a meeting, a decision and a handover. Turn adjectives such as strategic into visible actions and consequences.

03 Identify what stayed difficult in this future. Include unresolved trade-offs, resource limits and stakeholder differences so the story remains credible.

QUESTIONS TO OPEN THINKING

What would an ordinary Tuesday look like?

What would still be difficult?

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

CONTINUE THE METHOD

04 Work backwards to the capability, relationships and operating conditions that would support it. Separate what the executive can practise from what requires a collective decision.

05 Select a small signal that could appear within a month. Treat it as an experiment, not proof that the entire future has been secured.

06 Write a short future story and a first move. Agree when to revise the story in light of evidence rather than defending it as a promise.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 | Original executive application

X07 Twelve-month future story

ACTIVITY

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

Guide | **Worksheet** | Example

LIVE WORKSHEET

FUTURE-SCENE STORYBOARD

01

Future scene

02

Behaviour people notice

03

Difficulty that remains

NOW → NEXT USEFUL SIGNAL → FUTURE

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

01 Future scene

02 Observable leadership

03 Continuing difficulty

04 Required conditions

05 Near-term signal

06 First move

Basis: H01 | Original executive application

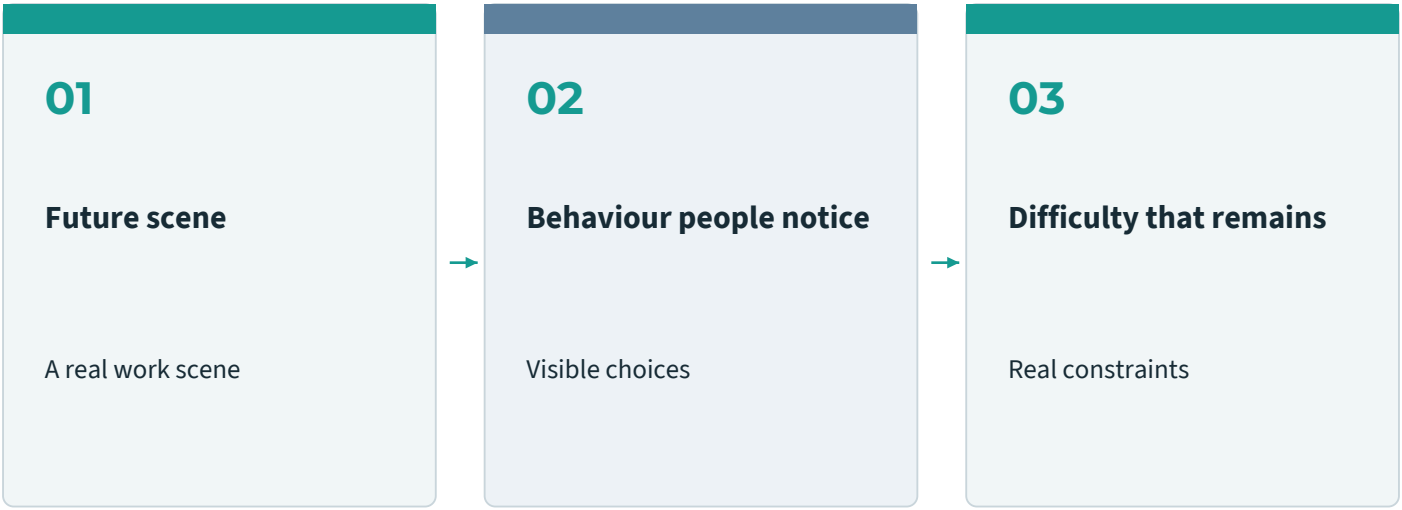
X07 Twelve-month future story

ACTIVITY

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

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

FUTURE-SCENE STORYBOARD



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

01 Future scene

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

02 Observable leadership

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

03 Continuing difficulty

Supplier information is still uncertain and some decisions remain uncomfortable.

04 Required conditions

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

05 Near-term signal

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

06 First move

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

Basis: H01 | Original executive application

X08

ACTIVITY

Is coaching the right help?

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

Practical guide | Working form | Worked example

EXCEL TAB X08 Is coaching the right help

TIME 40 minutes

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

RUN THE ACTIVITY

01 Ask what the person wants help with and what led to the request. Distinguish their choice from the sponsor's wording and allow them to disagree with the proposed focus.

02 Explore whether the need concerns thinking and practice, missing knowledge, unclear authority, an unresolved formal issue or health and safety. Do not diagnose a person from the answer.

03 Compare coaching with instruction, mentoring, management action and system improvement. More than one route may be needed; make ownership explicit.

QUESTIONS TO OPEN THINKING

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

What would still block progress even with excellent coaching?

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

CONTINUE THE METHOD

04 Check whether participation can be meaningfully voluntary, whether time and suitable competence are available, and whether confidentiality can be explained honestly.

05 Agree proceed, proceed with conditions, defer or use another route. A refusal is not evidence of poor motivation; record only information needed for the decision.

06 Explain what will happen next, what the sponsor will hear and how the person can revisit the decision. Use a formal referral protocol where required.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 / R01 | Original executive application

X08 Is coaching the right help?

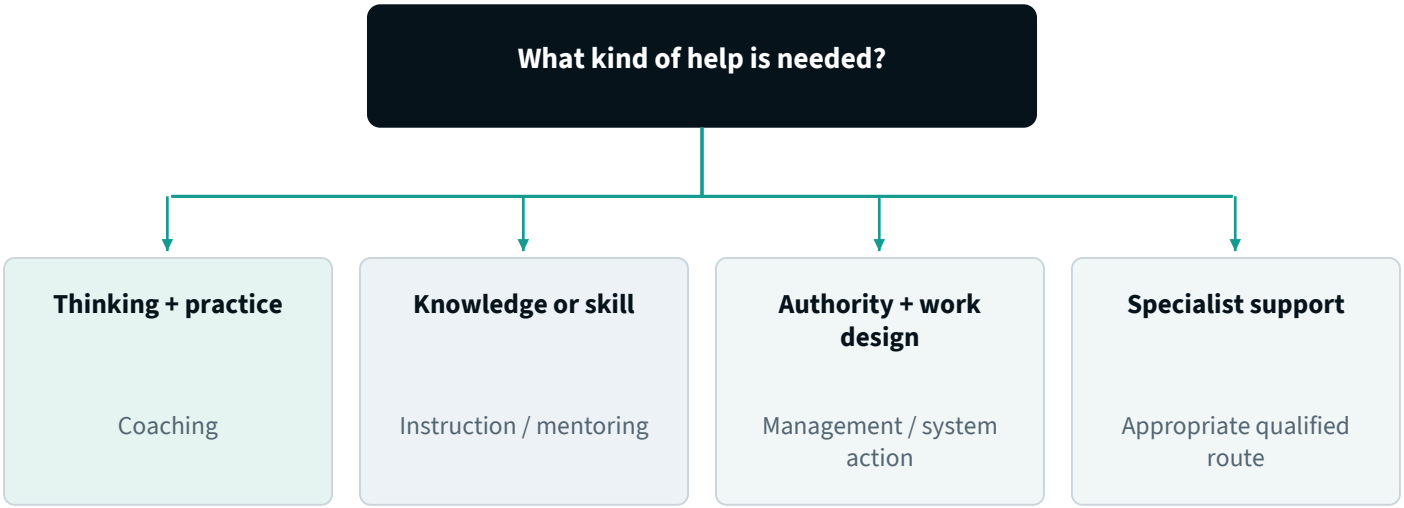
ACTIVITY

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

Guide | **Worksheet** | Example

LIVE WORKSHEET

SUPPORT-CHOICE DECISION TREE



PROCEED / PROCEED WITH CONDITIONS / DEFER / CHOOSE ANOTHER ROUTE

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

01 Question

02 Coachable element

03 Non-coaching element

04 Alternative support

05 Fit decision

06 Next communication

Basis: H01 / H04 / R01 | Original executive application

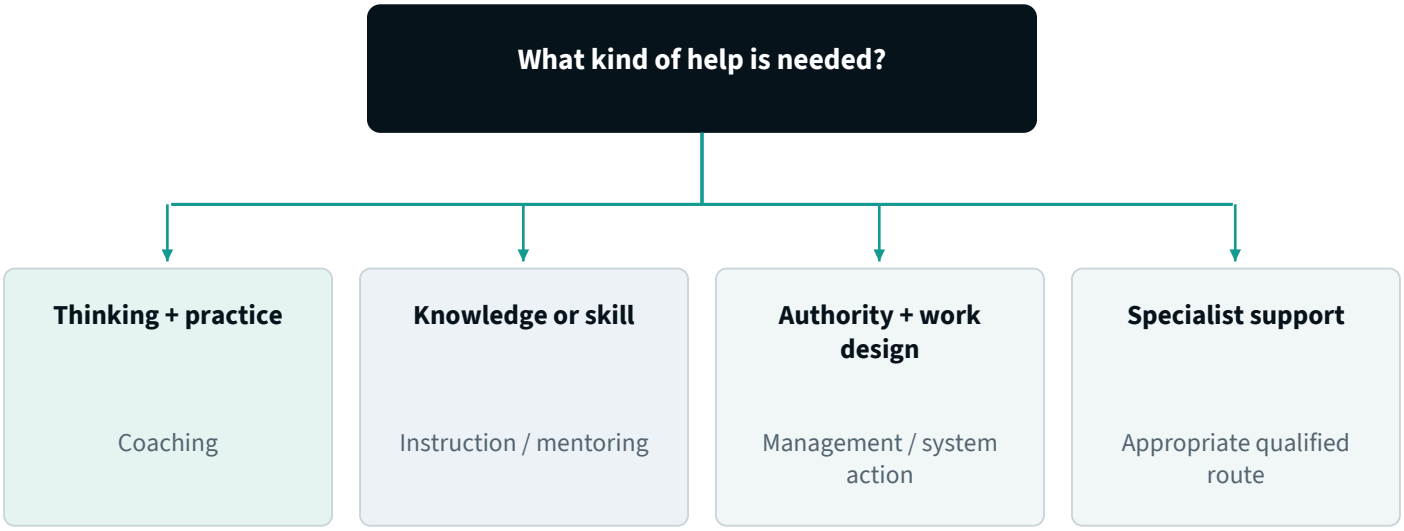
X08 Is coaching the right help?

ACTIVITY

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

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

SUPPORT-CHOICE DECISION TREE



PROCEED / PROCEED WITH CONDITIONS / DEFER / CHOOSE ANOTHER ROUTE

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

01 Question

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

02 Coachable element

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

03 Non-coaching element

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

04 Alternative support

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

05 Fit decision

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

06 Next communication

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

Basis: H01 / H04 / R01 | Original executive application

THE 6A WORKPLACE COACHING SYSTEM

02

Agree

A clear agreement protects useful freedom

THE GATE

Are rights and boundaries clear?

MINIMUM OUTPUT

Four-way contract

19 TOOLS & ACTIVITIES

Open the stage tool directory >

Agree: tools to use

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

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

BEFORE YOU MOVE ON

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

Agree: tools to use

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

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

BEFORE YOU MOVE ON

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

A clear agreement protects useful freedom

Agree creates the psychological and practical conditions for learning. The controlling 6A framework names four parties: coachee, coach, sponsor and programme owner. Their roles may overlap in a small organisation, but the responsibilities do not disappear. The line manager's support must also be explicit, whether or not that person is the sponsor. [H01-H04]

Contract the relationship and the system

Agree purpose, scope, cadence, fees or resources, roles, information, records, technology, review and exit. Explain what coaching is not. Where a manager uses coaching skills, acknowledge the employment power relationship rather than promising the confidentiality of an independent external coach.

Make information flows concrete

State who receives attendance, goals, agreed actions, assessment reports and private notes. Employer funding does not automatically give access to session content. Work through examples of a sponsor request, a platform recording and a serious concern. Verify applicable duties rather than promise absolute secrecy.

Agree how to work together

Discuss questions, silence, feedback, challenge, language and access preferences. The coachee can reject an interpretation. The coach can name competence boundaries and decline unsafe work. Revisit the agreement when an activity becomes unhelpful; initial consent is not permanent permission for every method.

Handle competing purposes honestly

A sponsor may want observable change while the executive wants space to explore. Find a legitimate shared work goal and retain differences. If coaching is being used alongside a formal performance or selection process, disclose the separation and do not allow confidential material to drift into consequential decisions.

Prepare for repair and exit

Describe a no-fault rematch route, complaints process, pause conditions and closure arrangements before they are needed. A missed assignment should prompt a review of relevance and opportunity, not a judgement about coachability. Ending an unsuitable engagement can be an appropriate outcome.

Check understanding, not signatures alone

Ask each party to explain the agreement in their own words. A signed form with contradictory expectations is not a reliable contract. Resolve material differences, record decisions and provide a usable copy. Re-contract after a role change, new sponsor, new assessment purpose or material technology change.

AGREE / OPERATING ROUTE

Choose the next useful move.

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

01

Choose the relationship

T17, T78, X09 / Chemistry, matching and access

02

Agree purpose and rights

T13, T14, T15, X10 / Four-way and engagement agreement

03

Protect information

T16, T18, T19, X11 / Flows, consent and records

04

Agree the working style

X12, X13, X14 / Challenge, participation and preparation

05

Plan exceptions

T20, T21, T22, T24 / Referral, rematch, re-contract and audit

GATE REVIEW

Are rights and boundaries clear? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

BASIS H01-H04 | Route selection is an original editorial aid

T13

TOOL

Four-way contracting canvas

Align coachee, coach, sponsor and programme owner.

Practical guide | Working form | Worked example

EXCEL TAB T13 Fourway contracting canvas

TIME 45-60 minutes initially, plus 15-30 minutes whenever purpose, role, risk or reporting changes | OWNER Coach

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Invite the coachee, coach, sponsor and programme owner to state purpose, expectations and concerns separately; include the line manager's support role explicitly where relevant.

02 Agree organisational relevance while preserving the coachee's ownership of goal wording and session agenda.

03 Define each party's contribution, authority, non-role and action when a system barrier emerges.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Specify private content, permitted reporting, exceptions, records, technology and exact information flows.

05 Agree review, support, rematch, escalation and re-contracting triggers; confirm understanding in each party's words.

BOUNDARY & CAUTION

Do not proceed when sponsorship, goal ownership or confidentiality expectations remain materially incompatible.

BETWEEN SESSIONS / HAND-OFF

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

SOURCE / EDITION NOTE

Edition clarification: the controlling 6A framework names coachee, coach, sponsor and programme owner. H04's T13 instruction names the line manager instead of the programme owner; this edition restores the controlling four parties and records manager support separately.

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

BASIS H01 / H04 | H04 source p.87

T13 Four-way contracting canvas

TOOL

Align coachee, coach, sponsor and programme owner.

Guide | **Worksheet** | Example | LIVE WORKSHEET



ONE AGREEMENT / FOUR DISTINCT RESPONSIBILITIES

Purpose Shared reason and coachee meaning

Goals Organisational relevance and coachee ownership

Roles Each party's contribution

Confidentiality What is private

Information sharing What is shared, by whom and when

Exceptions Law, safety and agreed escalation

Reviews Midpoint and closure process

Exit Rematch, pause and termination rights

Basis: H01 / H04 | H04 source p.87

T13 Four-way contracting canvas

TOOL

Align coachee, coach, sponsor and programme owner.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.



ONE AGREEMENT / FOUR DISTINCT RESPONSIBILITIES

Purpose Shared reason and coachee meaning

Strengthen Director M-07's decision framing and influence at MetroLink East's two upcoming investment gates.

Goals Organisational relevance and coachee ownership

The director owns the behavioural goal; the sponsor confirms relevance without selecting session topics or methods.

Roles Each party's contribution

Coachee experiments, coach facilitates, line manager creates opportunity, sponsor removes authority barriers and programme team assures quality.

Confidentiality What is private

Session dialogue and coach notes stay private except for explained imminent-harm, legal or safeguarding obligations.

Information sharing What is shared, by whom and when

Attendance, coachee-approved goal wording, midpoint support request and closing progress summary follow agreed dates and senders.

Exceptions Law, safety and agreed escalation

Not populated in the original worked extract.

Reviews Midpoint and closure process

Not populated in the original worked extract.

Exit Rematch, pause and termination rights

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.87

A four-way executive coaching agreement

Parties and purpose

Identify the coachee, coach, sponsor and programme owner, plus the line manager's support role where separate. State the development purpose, what is in scope and what is excluded. Record that coaching is not an assessment for selection or a substitute for formal employment procedures unless a distinct, transparent arrangement has been agreed.

Coachee ownership and participation

The coachee owns their session agenda, choices and agreed practice within the engagement purpose. Explain what is voluntary and any separate organisational requirements. Provide a route to question an activity, request an adjustment, pause, rematch or end the engagement without an invented judgement about motivation.

Coach competence and method

Describe the coach's role, relevant competence and limits. Explain that methods are chosen collaboratively and may be adapted. The coach will not provide clinical treatment, legal advice or technical authorisation outside their qualifications and remit. Identify the supervision and referral arrangements.

Sessions, access and practical arrangements

Specify the number or review-based arrangement of sessions, duration, delivery mode, scheduling, cancellations, fees or internal resources and access adjustments. Do not imply that a fixed number of sessions guarantees a result. Clarify what contact is available between sessions and what is not an emergency service.

Sponsor and programme responsibilities

The sponsor provides the agreed organisational support and respects the information boundary. The programme owner manages matching, access, quality, records and concerns within the approved policy. Clarify who acts when a system barrier prevents practice, and who can authorise changes to scope or resources.

Information sharing

List each information type, purpose, recipient and permission or applicable basis: attendance, goals, agreed actions, assessment reports, private notes and aggregate themes. Private session content is not automatically disclosed because the employer pays. Prepare a separate approved progress summary rather than sending the whole workbook.

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

A four-way executive coaching agreement

Limits to confidentiality

Explain relevant limits in plain language, including applicable duties and serious concerns requiring qualified action. Verify the local requirements and avoid an absolute promise of secrecy. Where disclosure is required, use the minimum necessary information and the appropriate route; explain how the coachee will be involved when appropriate.

Assessments

Use only authorised instruments and reports for a defined purpose, with suitable technical guidance, qualifications and language or population evidence. Explain access, interpretation and retest arrangements. No assessment item bank is reproduced in this toolkit. Do not combine unlike scores into a psychological verdict.

Records, platforms and AI

Specify what records are created, where they are stored, who can access them and the verified retention, return and deletion arrangements. Recording, transcription and AI use are not default permissions. Review processing, security, access and other applicable requirements before introducing a platform or new use.

Workplace practice and safety

Agree realistic opportunities, support and authority for experiments. The coachee remains responsible for role duties and obtains necessary permissions. Experiments must not bypass safety, professional or technical requirements, and affected colleagues should not be covertly assessed.

Review, concerns and changes

Specify review dates, evidence and decisions. Provide named routes for concerns, complaints, referral, rematching and re-contracting. A role change, new sponsor, material technology change or altered assessment purpose triggers a review of the agreement. Serious concerns are not averaged away by positive feedback.

Closure and approval

At closure, agree what has ended, what remains owned elsewhere, future support and the permitted summary. Confirm the record lifecycle. Record each party's understanding, unresolved conditions and approval date. This specimen is a drafting aid; qualified local review is required before use as a binding agreement.

BASIS H01-H04 | Original editorial guidance where not otherwise attributed

T14

TOOL

Coachee agreement

Create informed, practical consent for the engagement.

Practical guide | Working form | Worked example

EXCEL TAB T14 Coachee agreement

TIME 20-30 minutes before coaching begins; pause and re-agree after any material service change | OWNER Coach + coachee

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Explain choice, any implications of declining and available alternatives before seeking agreement.

02 Define workplace-development scope, exclusions and the boundary with advice, therapy and formal assessment.

03 Agree session number, duration, channel, location, between-session contact and cancellation arrangements.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Explain confidentiality, specific exceptions and what the coach will do if an exception may apply.

05 List records, owners, access, retention, technology and complaint or withdrawal routes; record informed acceptance.

BOUNDARY & CAUTION

Do not treat signature as informed agreement when choice, records, exceptions or technology remain unclear.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.90

T14

TOOL

Coachee agreement

Create informed, practical consent for the engagement.

Practical guide | Working form | Worked example

EXCEL TAB T14 Coachee agreement

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

Voluntariness Choice and implications of declining	
Scope Coaching purpose and limits	
Format Sessions, channels, location and contact	
Confidentiality Rules and exceptions	
Records What is kept and by whom	
Technology Platforms, recording, transcription and AI	
Responsibilities Preparation, action and feedback	
Ending Closure, complaints and referrals	

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

T14

TOOL

Coachee agreement

Create informed, practical consent for the engagement.

Practical guide | Working form | Worked example

EXCEL TAB T14 Coachee agreement

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Voluntariness Choice and implications of declining	Participation is optional; declining triggers no adverse employment consequence and leaves existing support routes available.
Scope Coaching purpose and limits	Six workplace-development sessions address decision framing and stakeholder influence, not therapy, technical advice or formal assessment.
Format Sessions, channels, location and contact	Six confidential sixty-minute video sessions over five months, plus an optional in-person closure at Meridian headquarters.
Confidentiality Rules and exceptions	The coach shares no session content; narrowly defined safety, legal and safeguarding exceptions are explained before consent.
Records What is kept and by whom	The coach keeps brief process notes for three months after closure; Meridian retains only operational and agreed outcome data.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T15

TOOL

Sponsor briefing guide

Set expectations and prevent surveillance pressure.

Practical guide | Working form | Worked example

EXCEL TAB T15 Sponsor briefing guide

TIME 45-minute briefing before nomination or goal-setting, with a 15-minute midpoint boundary refresh | OWNER Programme owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Explain the strategic purpose, intended population, coaching mechanism, limits and concurrent system actions.

02 Define sponsor duties for context, opportunity, workload, barrier removal and response to support requests.

03 State exactly what attendance, goal, progress and outcome information sponsors will and will not receive.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Rehearse how sponsors can invite relevant goals without directing private topics or judging participation.

05 Explain aggregate-theme thresholds, decision use, participant communication and the route for boundary questions.

BOUNDARY & CAUTION

Do not use sponsor briefing to solicit personal disclosures or coach-generated judgments about a participant.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.93

T15

TOOL

Sponsor briefing guide

Set expectations and prevent surveillance pressure.

Practical guide | Working form | Worked example

EXCEL TAB T15 Sponsor briefing guide

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

Purpose Why the offer exists	
Sponsor role Context, opportunity and support	
Information What sponsor will and will not receive	
Goal ownership How organisational relevance and coachee agency coexist	
System themes How aggregate learning may be shared	
Concern route Who to contact and when	

T15

TOOL

Sponsor briefing guide

Set expectations and prevent surveillance pressure.

Practical guide | Working form | Worked example

EXCEL TAB T15 Sponsor briefing guide

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose Why the offer exists	Enable project directors to make clearer capital-gate decisions while a separate initiative corrects cross-functional authority gaps.
Sponsor role Context, opportunity and support	Provide context, protect practice time, respond to agreed support requests and remove documented system barriers.
Information What sponsor will and will not receive	Sponsors receive attendance, approved goal wording and aggregate themes, never coach notes, personal disclosures or session narratives.
Goal ownership How organisational relevance and coachee agency coexist	Invite organisationally relevant goals, then let each director refine wording, evidence and experiments with their coach.
System themes How aggregate learning may be shared	Quarterly reporting suppresses small groups and shares only recurring barriers that meet the programme's aggregation threshold.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T16

TOOL

Confidentiality information protocol

Define every information flow before data is created.

Practical guide | Working form | Worked example

EXCEL TAB T16 Confidentiality information

TIME 60-90 minutes to map each item; qualified review before new data, recipient or technology use | OWNER Data owner + quality lead

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 List each proposed information item separately, including notes, ratings, attendance, transcripts and derived data.

02 Define the necessary purpose and reject items whose purpose can be met with less information.

03 Name the source, recipient and precise content; distinguish voluntary sharing from required disclosure.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Confirm lawful and ethical basis, access, secure channel, retention and participant visibility with qualified reviewers.

05 Test likely requests and exceptions; document refusal, correction, withdrawal and protocol-review routes.

BOUNDARY & CAUTION

Do not rely on generic consent where the purpose, recipient, content or legal obligation is specific.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.96

T16

TOOL

Confidentiality information protocol

Define every information flow before data is created.

Practical guide | Working form | Worked example

EXCEL TAB T16 Confidentiality information

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

Information item	Purpose	Source	Recipient / access	Basis / consent	Store + retention	Exception / deletion

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

T16

TOOL

Confidentiality information protocol

Define every information flow before data is created.

Practical guide | Working form | Worked example

EXCEL TAB T16 Confidentiality information

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Information item Attendance, goal, notes, feedback, outcomes, transcript	Coachee-approved one-sentence goal summary, excluding session content, personality labels and unverified stakeholder allegations.
Purpose Why it is needed	Confirm organisational relevance and enable the line manager to offer appropriate work opportunities and support.
Source Who provides it	The coachee drafts the wording with the coach and explicitly approves the final version.
Recipient Who receives it	Named line manager and programme coordinator; the executive sponsor receives only aggregated goal categories.
Lawful/ethical basis Consent, contract or obligation	Documented participant agreement and programme administration purpose, subject to local privacy review and withdrawal process.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T17

TOOL

Role-conflict declaration

Surface dual roles and decide whether they can be managed.

Practical guide | Working form | Worked example

EXCEL TAB T17 Roleconflict declaration

TIME 10-15 minutes at matching and rechecked on change; rapid specialist review for material conflicts | OWNER Coach

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Ask the coach to declare employment, consulting, assessment, commercial and professional roles relevant to the engagement.

02 Map prior and current relationships with coachee, sponsor, provider, suppliers and connected decision-makers.

03 Identify non-public information already held and whether it can influence questions or be inadvertently disclosed.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Assess employment, assessment, procurement, referral and reputational power rather than financial interest alone.

05 Decide disclose and manage, offer choice, restrict scope or decline; record controls and recheck triggers.

BOUNDARY & CAUTION

Do not assume disclosure removes a conflict; material power or information risks may still require rematch.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.99

T17

TOOL

Role-conflict declaration

Surface dual roles and decide whether they can be managed.

Practical guide | Working form | Worked example

EXCEL TAB T17 Roleconflict declaration

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

Roles Coach's other roles	
Relationships Prior/current relationships	
Information What the coach may already know	
Decision power Employment, assessment or commercial influence	
Risk Impact on trust or impartiality	
Safeguard Disclosure, separation, supervision or reassignment	
Consent Parties' informed decision	

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

T17

TOOL

Role-conflict declaration

Surface dual roles and decide whether they can be managed.

Practical guide | Working form | Worked example

EXCEL TAB T17 Roleconflict declaration

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Roles Coach's other roles	Proposed coach previously advised Meridian's joint-venture partner and now provides independent executive coaching.
Relationships Prior/current relationships	The coach worked with the commercial sponsor eighteen months ago but has never met Director M-07.
Information What the coach may already know	Prior consulting exposed the coach to non-public contract history relevant to MetroLink East negotiations.
Decision power Employment, assessment or commercial influence	The coach holds no employment authority, supplier-selection vote or current advisory mandate with either party.
Risk Impact on trust or impartiality	Undisclosed knowledge could shape questions, reduce perceived impartiality and create concern about confidential commercial information.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T18

TOOL

Session working agreement

Agree how coach and coachee will work together in the room.

Practical guide | Working form | Worked example

EXCEL TAB T18 Session working agreement

TIME 15-20 minutes in the first session and five minutes to revisit when working needs change | OWNER Coach + coachee

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Ask what useful challenge feels like and agree how permission, pause and disagreement will work.

02 Negotiate pace, silence, structure and reflection time rather than assuming one conversational rhythm.

03 Agree how observations and feedback will distinguish behaviour, inference, impact and coachee interpretation.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

The coach dictates challenge, pace and feedback without coachee negotiation; Treating an access requirement as an optional preference that can be ignored; Leaving between-session contact open-ended and creating hidden availability expectations.

CONTINUE THE METHOD

04 Confirm language, format, sensory, technology and communication adjustments without seeking unnecessary explanation.

05 Set between-session contact, experiment, response-time and emergency boundaries; revisit usefulness periodically.

BOUNDARY & CAUTION

Do not use the working agreement to override a participant's access need, refusal or right to pause.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.102

T18

TOOL

Session working agreement

Agree how coach and coachee will work together in the room.

Practical guide | Working form | Worked example

EXCEL TAB T18 Session working agreement

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

Useful challenge How permission and challenge will work	
Pace Reflection, silence and structure	
Feedback How observations are offered and tested	
Access Language, format and adjustments	
Between sessions Contact and experiments	
Rupture How either party will name what is not working	

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

T18

TOOL

Session working agreement

Agree how coach and coachee will work together in the room.

Practical guide | Working form | Worked example

EXCEL TAB T18 Session working agreement

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Useful challenge How permission and challenge will work	The coach may test contradictions after asking permission; the director can pause, reject or reframe any challenge.
Pace Reflection, silence and structure	Allow quiet reflection before options, then reserve the final ten minutes for a specific workplace experiment.
Feedback How observations are offered and tested	Offer behaviour-based observations as hypotheses, check accuracy and distinguish direct evidence from interpretation.
Access Language, format and adjustments	Use plain English, share questions in chat when useful and send no unrequested session summaries afterward.
Between sessions Contact and experiments	Contact is limited to scheduling and one agreed experiment check-in through the approved portal.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T19

TOOL

Data processing map

Control personal and sensitive coaching data end to end.

Practical guide | Working form | Worked example

EXCEL TAB T19 Data processing map

TIME Half-day lifecycle mapping; technical and privacy review before launch, integration or material platform change | OWNER Privacy/data owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Inventory every data element from discovery through matching, sessions, evaluation, supervision, closure and deletion.

02 Trace where each element is entered, stored, copied, exported or cached, including informal channels.

03 Assign role-based access and test whether technical permissions match the documented need.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Map processors, subprocessors, integrations, countries and transfer mechanisms with security and privacy reviewers.

05 Set item-specific retention, deletion evidence, incident response and review triggers; remove unjustified collection.

BOUNDARY & CAUTION

Do not treat this map as a substitute for qualified privacy, security and records-management assessment.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.105

T19

TOOL

Data processing map

Control personal and sensitive coaching data end to end.

Practical guide | Working form | Worked example

EXCEL TAB T19 Data processing map

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

Data element	System / processor	Access	Transfer / country	Retention	Deletion test	Risk / control

T19

TOOL

Data processing map

Control personal and sensitive coaching data end to end.

Practical guide | Working form | Worked example

EXCEL TAB T19 Data processing map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Data element Minimum necessary item	Participant identifier, matching preferences, session dates, approved goal summary and agreed progress ratings only.
System Where captured or stored	Encrypted Meridian coaching portal with session transcription, generative summaries and free-text diary functions disabled.
Access Role-based permissions	Operations sees matching and attendance; evaluator receives pseudonymised measures; coaches access only their assigned engagements.
Transfer Countries/processors/channels	Hosting remains in the approved UK region; no subprocessor or cross-border transfer is permitted without review.
Retention Period and rationale	Operational records delete twelve months after closure; coach process notes delete after three months unless law requires otherwise.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T20

TOOL

Referral and escalation protocol

Guide proportionate response when needs exceed coaching boundaries.

Practical guide | Working form | Worked example

EXCEL TAB T20 Referral and escalation pro

TIME Two-hour design and tabletop test; immediate qualified consultation when a live trigger occurs | OWNER Quality lead

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Define observable triggers across distress, imminent safety, safeguarding, legal, grievance and capability categories.

02 Specify the coach's immediate within-competence response, including pause, explanation and urgent safety action.

03 Name rapid consultation routes, response times, deputies and the information each specialist requires.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Map qualified referral or formal routes, participant choice and continuity where coaching may safely continue.

05 Set minimum disclosure, documentation, follow-up and incident-review rules; test them through realistic scenarios.

BOUNDARY & CAUTION

Do not improvise urgent clinical, safeguarding or legal action from this template; follow qualified local protocol.

BETWEEN SESSIONS / HAND-OFF

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

SOURCE / EDITION NOTE

Localisation required: complete and verify the routes before use. The source's illustrative tier timings are not universal legal or clinical standards.

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

BASIS H01 / H04 | H04 source p.108

T20

TOOL

Referral and escalation protocol

Guide proportionate response when needs exceed coaching boundaries.

Practical guide | Working form | Worked example

EXCEL TAB T20 Referral and escalation pro

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

Route / trigger	Qualified contact	Primary / backup	Availability	Authority / action	Secure contact / test

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

T20

TOOL

Referral and escalation protocol

Guide proportionate response when needs exceed coaching boundaries.

Practical guide | Working form | Worked example

EXCEL TAB T20 Referral and escalation pro

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Trigger Distress, safety, legal, grievance, capability or other	Director reports persistent sleeplessness, panic before site visits and thoughts suggesting possible immediate personal safety risk.
Coach response Immediate action within competence	Pause coaching, assess immediate urgency within competence, explain limits and support contact with qualified assistance.
Consultation Supervisor/quality /legal/safeguarding	Use the named rapid-consultation supervisor and Meridian safeguarding lead without circulating session details more widely.
Referral Qualified service or formal route	Offer occupational health, employee assistance and emergency services according to urgency; coaching does not replace clinical care.
Disclosure Minimum information and basis	Share only information necessary to protect safety, explain the basis where possible and document the decision securely.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T21

TOOL

Rematch and termination guide

Enable dignified exit without requiring personal disclosure.

Practical guide | Working form | Worked example

EXCEL TAB T21 Rematch and termination gui

TIME 15-30 minutes for routine rematch; immediate review for safety, boundary or conduct concerns | OWNER Programme owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Record the reason category without requiring private content or forcing the participant to justify fit.

02 Assess whether to pause, protect, continue briefly or activate an urgent conduct or safeguarding route.

03 Identify the minimum operational information needed and restrict access to those arranging the response.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Offer recontract, rematch, referral or closure with genuine participant choice and stated service levels.

05 Resolve fees, unused sessions, records, communications and follow-up; analyse aggregate patterns without identifying people.

BOUNDARY & CAUTION

Do not require explanation or continued contact when a participant requests a routine confidential rematch.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.111

T21

TOOL

Rematch and termination guide

Enable dignified exit without requiring personal disclosure.

Practical guide | Working form | Worked example

EXCEL TAB T21 Rematch and termination gui

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

Reason category Fit, logistics, boundary, conflict, conduct or no longer needed	
Immediate need Pause, protect or continue temporarily	
Information Minimum needed to act	
Options Recontract, rematch, refer or close	
Commercial effect Fees and cancellation	
Learning Aggregate quality insight	

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

T21

TOOL

Rematch and termination guide

Enable dignified exit without requiring personal disclosure.

Practical guide | Working form | Worked example

EXCEL TAB T21 Rematch and termination gui

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Reason category Fit, logistics, boundary, conflict, conduct or no longer needed	Fit concern: after two sessions, the director experiences the coach's industry background as constraining honest exploration.
Immediate need Pause, protect or continue temporarily	Pause future sessions while preserving confidentiality; no safety, conduct or urgent support concern is present.
Information Minimum needed to act	Operations records only participant-requested rematch, scheduling constraints and preferred alternative profile, not the private rationale.
Options Recontract, rematch, refer or close	Offer two suitable coaches within five working days, or close the engagement without requiring justification.
Commercial effect Fees and cancellation	Unused sessions transfer to the replacement coach; the chemistry session carries no participant or project charge.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T22

TOOL

Team coaching contract

Contract a team, its members, leader, sponsor and coach around real work.

Practical guide | Working form | Worked example

EXCEL TAB T22 Team coaching contract

TIME 60-90 minutes before substantive work, with re-contracting after membership, purpose or sponsor changes | OWNER Team coach

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Define the intact team's real interdependent task, required outcomes and reason team coaching may help.

02 Confirm membership, authority, absences, changing participants and whose work is affected by the team.

03 Differentiate team coaching from facilitation, consulting, training, mediation and individual performance action.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Agree within-team and sponsor information boundaries, recognising confidentiality limits in collective work.

05 Set voice, participation, experiment, conflict, decision and review norms; obtain meaningful agreement from all members.

BOUNDARY & CAUTION

Do not use team coaching for a nominal group lacking a shared task, interdependence or safe participation conditions.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.114

T22

TOOL

Team coaching contract

Contract a team, its members, leader, sponsor and coach around real work.

Practical guide | Working form | Worked example

EXCEL TAB T22 Team coaching contract

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

Team purpose Real task and outcomes	
Membership Who is in the team and why	
Boundaries Team coaching vs facilitation/consulting	
Confidentiality Inside-team and sponsor information	
Participation Voice, absence and voluntariness	
Live work Meetings/decisions to observe	
Evaluation Collective behaviour and task evidence	

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

T22

TOOL

Team coaching contract

Contract a team, its members, leader, sponsor and coach around real work.

Practical guide | Working form | Worked example

EXCEL TAB T22 Team coaching contract

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Team purpose Real task and outcomes	Help the MetroLink East gate team resolve live scope and contingency decisions with clearer shared accountability.
Membership Who is in the team and why	Project, commercial, engineering, operations and community leads who jointly produce and execute capital-gate recommendations.
Boundaries Team coaching vs facilitation/consulting	The coach works on team interaction and decision process; specialists retain technical, contractual and assurance authority.
Confidentiality Inside-team and sponsor information	Team-session content remains inside the room; the sponsor receives agreed decisions, support requests and aggregated process learning.
Participation Voice, absence and voluntariness	Core members commit to four sessions; anyone may decline a personal disclosure without losing decision voice.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T23

TOOL

Digital and AI consent notice

Secure informed use of AI-enabled or recorded coaching.

Practical guide | Working form | Worked example

EXCEL TAB T23 Digital and AI consent noti

TIME 45-60 minutes to draft; privacy, security and legal review before launch and after any material product or data-use change. | OWNER Product owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Name the tool/provider and state exactly whether AI generates, summarises, recommends, matches or analyses.

02 Map every input, output and log, including storage, access, retention and any model-training use.

03 Define where human review intervenes and which decisions the system must never make alone.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Explain accuracy and safety limits, opt-out, correction, deletion and export in plain language.

05 Record affirmative choice and publish the named human-support and incident-escalation route.

BOUNDARY & CAUTION

Do not treat a notice or click-through as informed consent when AI purpose, data use, human oversight or a viable non-AI route is unclear.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.117

T23

TOOL

Digital and AI consent notice

Secure informed use of AI-enabled or recorded coaching.

Practical guide | Working form | Worked example

EXCEL TAB T23 Digital and AI consent noti

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

Tool Provider and function	
AI role Generate, summarise, recommend, match or analyse	
Data Inputs, outputs, logs and model training	
Human review When and by whom	
Limits Accuracy, safety and not-for-use cases	
Choice Opt out, correct, delete, export	
Escalation Human support and incident route	

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

T23

TOOL

Digital and AI consent notice

Secure informed use of AI-enabled or recorded coaching.

Practical guide | Working form | Worked example

EXCEL TAB T23 Digital and AI consent noti

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Tool Provider and function	Gate Reflect sandbox, supplied by the pilot vendor for fictional capital-decision rehearsal outside live coaching sessions.
AI role Generate, summarise, recommend, match or analyse	Generate alternative stakeholder questions and summarise only the scenario text deliberately entered by the participant.
Data Inputs, outputs, logs and model training	Use invented project details; prompts and outputs are logged for thirty days and excluded from model training.
Human review When and by whom	The participant judges every suggestion; a qualified practice lead reviews safety samples and reported failures.
Limits Accuracy, safety and not-for-use cases	Never enter live project, personal or contractual data; do not use outputs for safety, legal or investment decisions.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T24

TOOL

Contract quality audit

Check that live agreements meet minimum standards.

Practical guide | Working form | Worked example

EXCEL TAB T24 Contract quality audit

TIME 60-90 minutes per quarterly sample, plus action-owner follow-up within the severity-based deadline. | OWNER Quality lead

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Select a risk-based sample and strip out coaching content not needed for the audit.

02 Check that purpose, parties, roles and expected decisions are explicit in each agreement.

03 Test confidentiality wording against actual exceptions, technologies, records and data access.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Checking whether clauses exist without testing whether parties understand them; Selecting only convenient contracts instead of a risk-based representative sample; Extracting private session content to prove the engagement had a purpose.

CONTINUE THE METHOD

04 Verify referral, safeguarding, complaints and role-conflict routes against current practice.

05 Classify each finding, assign corrective action and owner, and verify closure by severity.

BOUNDARY & CAUTION

Do not infer coaching quality from paperwork conformity alone or audit confidential session content that is unnecessary to the stated quality purpose.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.120

T24

TOOL

Contract quality audit

Check that live agreements meet minimum standards.

Practical guide | Working form | Worked example

EXCEL TAB T24 Contract quality audit

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

Audit criterion	0 absent	1 partial	2 complete	Evidence / finding	Severity / action
Purpose and parties					
Voluntariness and rights					
Goal relevance / ownership					
Confidentiality and sharing					
Exceptions / referral					
Records / technology / AI					
Access / adjustments					
Review / rematch / complaint / exit					

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

T24

TOOL

Contract quality audit

Check that live agreements meet minimum standards.

Practical guide | Working form | Worked example

EXCEL TAB T24 Contract quality audit

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Sample Engagement identifier without unnecessary content	Pseudonymised engagement MIG-CG-07, selected in the first monthly risk-based contract audit.
Purpose Clear and appropriate	The contract names decision framing and influence development, excluding technical assurance and performance assessment.
Parties Roles understood	Director, coach, line manager, executive sponsor and programme owner can each explain their distinct responsibilities.
Confidentiality Specific and current	Private content, agreed reporting, exceptions, rematch and re-contracting triggers are explicit and currently understood.
Data Records and technology covered	The agreement covers portal records, disabled transcription, access roles, UK hosting and verified deletion dates.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T78

TOOL

Matching, chemistry and rematch protocol

Create a fair, confidential and responsive process for matching coaches and coachees.

Practical guide | Working form | Worked example

EXCEL TAB T78 Matching chemistry and rema

TIME 20-minute intake, 30-minute chemistry check; rematch within SLA | OWNER Programme operations

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

01 Collect only coaching need, complexity, preferences, access and availability required.

02 Screen prior relationships, information, commercial interests and decision influence.

03 Create a shortlist of authorised coaches who satisfy scope and access needs.

CONTINUE THE METHOD

04 Use chemistry to test trust, challenge, method and practical fit.

05 Record acceptance or no-fault rematch without requiring personal explanation.

06 Review protected match and rematch patterns to improve service design.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Collecting personality or identity data not needed for a safe match; Allowing the chemistry conversation to become an uncontracted coaching session; Requiring the participant to justify a no-fault rematch request.

BOUNDARY & CAUTION

Do not infer fit from protected characteristics, personality profiling or opaque automated matching.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.123

T78

TOOL

Matching, chemistry and rematch protocol

Create a fair, confidential and responsive process for matching coaches and coachees.

Practical guide | Working form | Worked example

EXCEL TAB T78 Matching chemistry and rema

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

Matching element	Minimum record / decision
Need and complexity - minimum data	
Access and preference	
Conflict and prior-information screen	
Shortlist and rationale	
Chemistry check: trust, challenge, method and practical fit	
Accept / alternative / rematch and SLA	
Data retained / deleted	

T78

TOOL

Matching, chemistry and rematch protocol

Create a fair, confidential and responsive process for matching coaches and coachees.

Practical guide | Working form | Worked example

EXCEL TAB T78 Matching chemistry and rema

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Need/complexity Purpose, scope and risk without excess personal data	Project director needs decision-influence coaching; moderate sponsor complexity, no specialist clinical need.
Preferences/access Language, format, identity or adjustment requested	Direct challenge, infrastructure experience, captions, keyboard-accessible materials and morning sessions.
Conflict screen Prior relationships, influence or information	Coach previously advised another portfolio but holds no relationship, information or decision influence here.
Shortlist Suitable coach options and rationale	Two authorised practitioner-level coaches meet scope, access, availability and conflict requirements.
Chemistry check What both parties assess	Participant chooses Coach B after testing challenge style, trust and working accessibility.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

X09

ACTIVITY

Chemistry conversation from the coachee's chair

Give the executive an active role in choosing a coach and testing whether the relationship can be useful, safe and appropriately challenging.

Practical guide | Working form | Worked example

EXCEL TAB X09 Chemistry conversation from

TIME 30 minutes; 10 minutes private reflection

BRING Coach profile and actual scope of competence | Information on alternatives and rematching | Two questions the coachee wants to explore

RUN THE ACTIVITY

01 Invite the coachee to explain what they need and what would make the relationship unhelpful. Do not treat the meeting as a sales pitch or collect unnecessary personal history.

02 Explain how coaching is conducted, where the coach's expertise ends, and how supervision, confidentiality and concerns are handled. Be clear about any assessment or sponsor role.

03 Ask the coachee to interview the coach using their own questions. Include a difficult example: a sponsor requests session content, or the coachee wants advice.

QUESTIONS TO OPEN THINKING

What should I know about how you prefer to think?

How would you want me to respond when we disagree?

What do you need to ask me before choosing?

CONTINUE THE METHOD

04 With permission, spend five minutes exploring a modest work question. Stop before the conversation becomes an uncontracted deep intervention.

05 Reflect together on the experience: was the person heard, could they disagree, and did the method fit? Do not convert rapport into a compatibility score.

06 Give private time and a no-fault option to decline. Record the choice and any conditions, not an assessment of the person's willingness to be coached.

BOUNDARY & CAUTION

Chemistry is not proof of competence. Do not imply that a coachee must accept a match because it has already been paid for.

BETWEEN SESSIONS / HAND-OFF

After the meeting, privately record one reason to proceed, one concern and one condition. Share only what is necessary to establish the match.

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

BASIS H01 / R01 | Original executive application

X09 Chemistry conversation from the coachee's chair

ACTIVITY

Give the executive an active role in choosing a coach and testing whether the relationship can be useful, safe and appropriately challenging.

TWO-WAY CHEMISTRY INTERVIEW

01 **Ask about the method**

02 **Test a real conversation**

03 **Choose freely**

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 **Development need**

02 **Questions for the coach**

03 **Mini-conversation**

04 **Experience noticed**

05 **Concerns and conditions**

06 **Choice**

Basis: H01 / R01 | Original executive application

X09 Chemistry conversation from the coachee's chair

ACTIVITY

Give the executive an active role in choosing a coach and testing whether the relationship can be useful, safe and appropriately challenging.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

TWO-WAY CHEMISTRY INTERVIEW

01 Ask about the method

02 Test a real conversation

03 Choose freely

What mattered? → What happened? → What else explains it?

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 Development need

M-07 wants a thinking partner who will challenge assumptions about delegation without prescribing a personality type.

02 Questions for the coach

How do you handle sponsor requests? When do you offer advice? What happens if the match is not useful?

03 Mini-conversation

A five-minute exploration separates delayed evidence from an assumed lack of trust.

04 Experience noticed

M-07 felt able to reject one interpretation and the coach revised it without becoming defensive.

05 Concerns and conditions

Avoid recording sessions; establish the sponsor review wording in advance.

06 Choice

Proceed to contracting after private consideration, with a rematching route through the programme owner.

Basis: H01 / R01 | Original executive application

X10

ACTIVITY

Negotiate a shared coaching goal

Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.

Practical guide | Working form | Worked example

EXCEL TAB X10 Negotiate a shared coaching

TIME 60 minutes; coach prepares separately with each party

BRING Role mandate | Initial coachee and sponsor priorities | Known organisational constraints and review decision

RUN THE ACTIVITY

01 Ask each party to describe the desired work difference with a recent example. Keep the sponsor's evaluation responsibilities distinct from the coach's developmental role.

02 Place shared interests, different interests and non-negotiable requirements in separate areas. Do not manufacture agreement by replacing a disputed aim with vague language.

03 Translate the shared interest into a behaviour the coachee is willing to practise. Distinguish the organisational outcome from the individual's chosen action.

QUESTIONS TO OPEN THINKING

What is shared here, and what is still different?

What will the sponsor do to make practice possible?

What exactly may be said at the review?

CONTINUE THE METHOD

04 Specify support from the sponsor and manager, including time, authority, feedback and opportunities. A goal without these conditions may be unrealistic.

05 Agree what evidence and progress information may be shared, by whom and when. Private hypotheses and assessment detail are not automatically sponsor property.

06 Read the agreement aloud and invite dissent. Set a review date and a route for re-contracting if the role, purpose or consent changes.

BOUNDARY & CAUTION

Do not disguise a formal performance-improvement process as confidential coaching. Disclose any consequential assessment purpose and establish a separate process.

BETWEEN SESSIONS / HAND-OFF

Prepare the wording you are comfortable sharing at a sponsor review; ask the coach to challenge ambiguity before agreeing it.

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

BASIS H01 / H02 / R01 | Original executive application

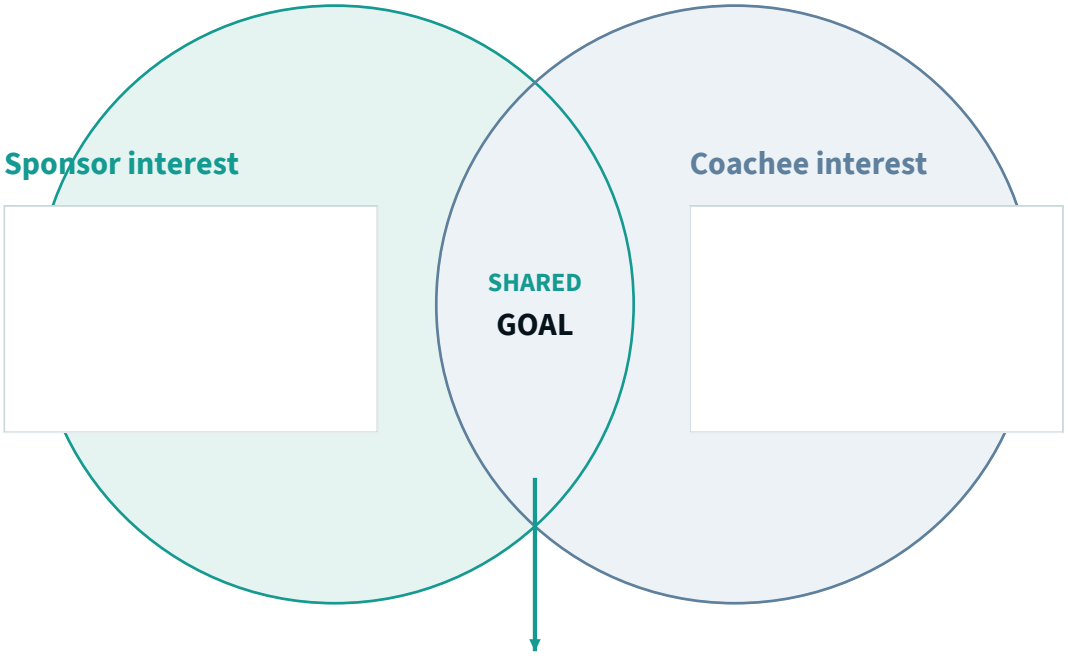
X10 Negotiate a shared coaching goal

ACTIVITY

Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.

Guide | **Worksheet** | Example

LIVE WORKSHEET



03 Shared behavioural goal

04 Support required

05 Information agreement

06 Review

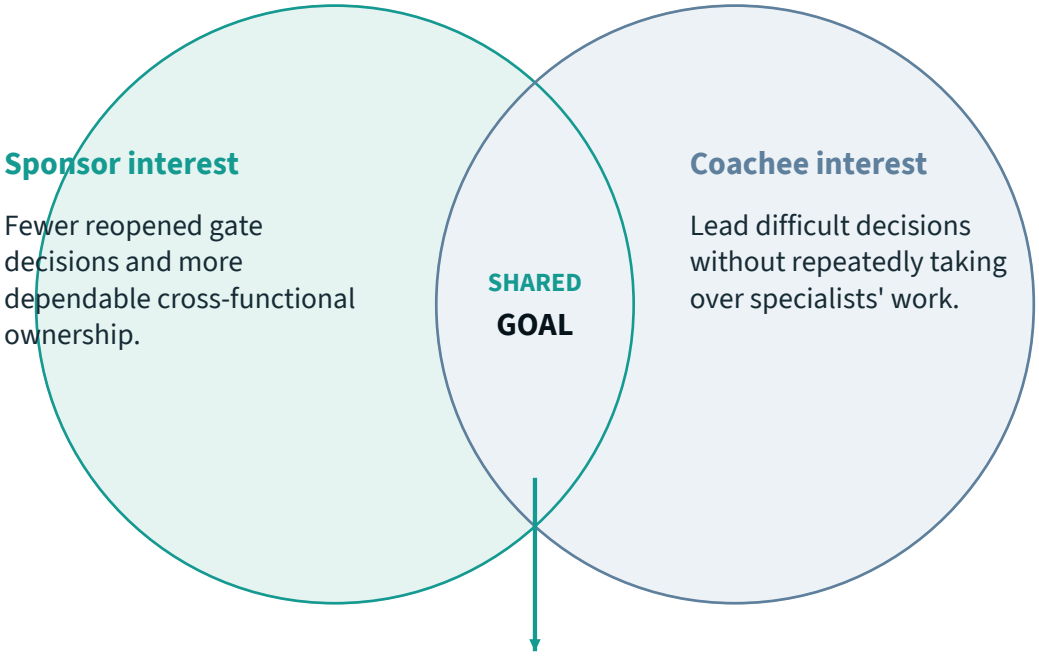
Basis: H01 / H02 / R01 | Original executive application

X10 Negotiate a shared coaching goal

ACTIVITY

Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE



03 Shared behavioural goal

At the next two gate reviews, use a clear decision question, invite concerns first and confirm the owner and conditions.

04 Support required

Sponsor clarifies scope authority; engineering lead provides timely evidence and feedback on the trial.

05 Information agreement

M-07 shares agreed actions and observed work evidence; no private notes, raw assessment scores or inferred motives are shared.

06 Review

After two gate meetings, coachee and sponsor discuss usefulness and conditions, then decide whether to retain or revise the goal.

Basis: H01 / H02 / R01 | Original executive application

X11

ACTIVITY

Confidentiality boundaries rehearsal

Make the information agreement usable by practising realistic requests before a boundary is put under pressure.

Practical guide | Working form | Worked example

EXCEL TAB X11 Confidentiality boundaries

TIME 35 minutes

BRING Draft four-way contract | Information-sharing matrix | Local specialist advice where disclosure duties require it

RUN THE ACTIVITY

01 Choose three plausible requests: a sponsor asks what was discussed, a manager wants an assessment report, and a safety concern arises. Use fictional wording, not live sensitive details.

02 For each, identify the information owner, intended recipient, purpose, permission and any applicable exception. An absolute promise of secrecy is not appropriate.

03 Ask the coachee what they understand the agreement to mean. Compare that understanding with the coach's and programme owner's interpretation.

QUESTIONS TO OPEN THINKING

What could this recipient legitimately need?

What have we actually agreed may be shared?

What would we say without revealing private content?

CONTINUE THE METHOD

04 Rehearse a response that acknowledges the request, states the boundary and offers a legitimate alternative such as an agreed progress summary.

05 For the safety scenario, practise pausing and seeking appropriate guidance, sharing only what is necessary under the applicable duty. Do not improvise legal advice.

06 Update the written information protocol and give each party a plain-language copy. Set a re-contracting trigger for recordings, platforms or role changes.

BOUNDARY & CAUTION

Confidentiality duties depend on context and jurisdiction. Verify applicable obligations; this rehearsal is not legal advice.

BETWEEN SESSIONS / HAND-OFF

Explain the information agreement back in your own words. Flag any recipient or technology not yet covered.

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

BASIS H01 / H04 / R01 | Original executive application

X11 Confidentiality boundaries rehearsal

ACTIVITY

Make the information agreement usable by practising realistic requests before a boundary is put under pressure.

Guide | Worksheet | Example

LIVE WORKSHEET

INFORMATION-PERMISSION MAP

1 Keep private Personal reflections	**2 Share by agreement** Specified progress
3 Clarify permission Report, recipient, purpose	**4 Duty or exception** Use the agreed route

Rehearse the actual request and response. Funding does not grant access to session content.

01 Request

02 Boundary

03 Response rehearsal

04 Permitted alternative

05 Exception route

06 Contract update

Basis: H01 / H04 / R01 | Original executive application

X11 Confidentiality boundaries rehearsal

ACTIVITY

Make the information agreement usable by practising realistic requests before a boundary is put under pressure.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

INFORMATION-PERMISSION MAP

1 Keep private

Personal reflections

2 Share by agreement

Specified progress

3 Clarify permission

Report, recipient, purpose

4 Duty or exception

Use the agreed route

Rehearse the actual request and response. Funding does not grant access to session content.

01 Request

The sponsor asks the coach whether M-07 has admitted a lack of confidence.

02 Boundary

Private session content and psychological interpretations are outside the sponsor update.

03 Response rehearsal

I cannot share private discussions. M-07 can discuss the agreed goal, practice undertaken and support needed at our scheduled review.

04 Permitted alternative

A coachee-approved summary of the two meeting experiments and the governance issue.

05 Exception route

For a serious safety concern, follow the agreed qualified escalation route and minimum necessary disclosure; do not promise advance consent in every circumstance.

06 Contract update

Add a worked example of sponsor requests and confirm that no recording or transcript will be created by default.

Basis: H01 / H04 / R01 | Original executive application

X12

ACTIVITY

Feedback and challenge agreement

Agree how the coach can offer observations, challenge assumptions and repair misunderstandings without taking over the executive's judgement.

Practical guide | Working form | Worked example

EXCEL TAB X12 Feedback and challenge agre

TIME 40 minutes

BRING A helpful and an unhelpful feedback experience | The coachee's communication and access preferences | A low-stakes topic for rehearsal

RUN THE ACTIVITY

01 Ask what made previous feedback useful or difficult. Focus on observable process, timing and language, avoiding assumptions about culture or personality.

02 Distinguish challenge to an idea, an observation about behaviour and an interpretation of meaning. Agree that interpretations are hypotheses the coachee may reject.

03 Offer several forms of challenge: a direct observation, a question, a pause, or a rehearsal. Let the coachee identify preferences while preserving the right to revise them.

QUESTIONS TO OPEN THINKING

What helps you examine a difficult idea without feeling cornered?

How will you tell me that my interpretation is wrong?

What should we do when challenge stops being useful?

CONTINUE THE METHOD

04 Practise one observation using a modest example. Ask how it landed, what was inaccurate and how the wording could be improved.

05 Agree a pause or repair phrase and a route for concerns. The coach remains responsible for ethical limits even when the coachee requests very forceful challenge.

06 Record the agreement and check it again after the first substantive session. A preference is not permanent permission.

BOUNDARY & CAUTION

Never interpret consent to challenge as consent to humiliation, coercion, unqualified therapy or personal disclosure.

BETWEEN SESSIONS / HAND-OFF

Notice one moment when challenge helped and one when it did not. Bring the process detail rather than judging the whole relationship.

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

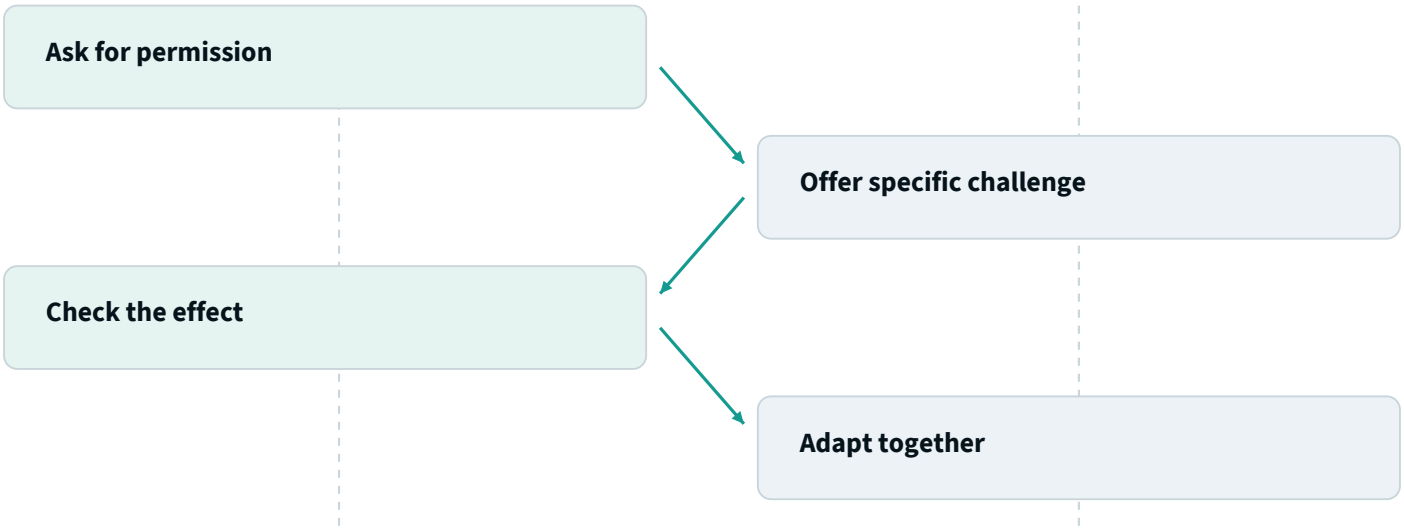
BASIS H01 / R01 / R12 | Original executive application

X12 Feedback and challenge agreement

ACTIVITY

Agree how the coach can offer observations, challenge assumptions and repair misunderstandings without taking over the executive's judgement.

CHALLENGE-AND-PERMISSION REHEARSAL



Speak the words aloud. Pause, listen, revise and rehearse again; do not script the other person.

01 Helpful conditions

02 Unhelpful conditions

03 Preferred challenge

04 Rehearsal

05 Repair phrase

06 Review point

Basis: H01 / R01 / R12 | Original executive application

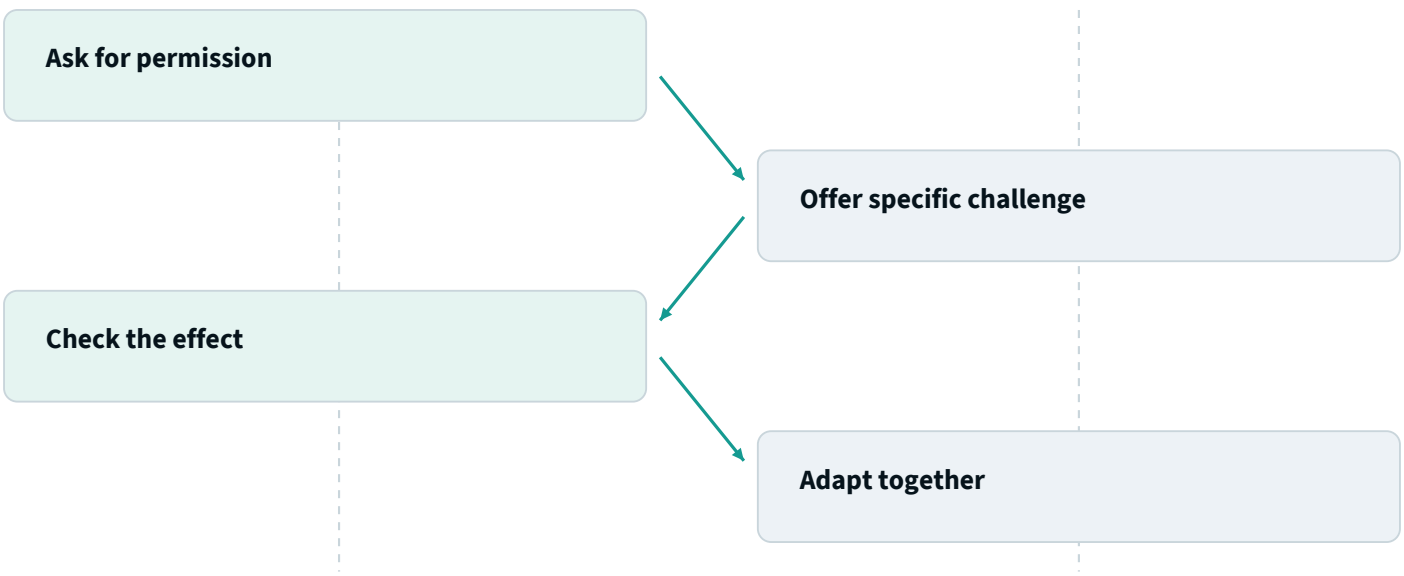
X12 Feedback and challenge agreement

ACTIVITY

Agree how the coach can offer observations, challenge assumptions and repair misunderstandings without taking over the executive's judgement.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

CHALLENGE-AND-PERMISSION REHEARSAL



Speak the words aloud. Pause, listen, revise and rehearse again; do not script the other person.

01 Helpful conditions

A specific example, time to think and a question before a conclusion.

02 Unhelpful conditions

Being told that a personality label explains every disagreement.

03 Preferred challenge

Direct observation followed by an invitation to test its meaning against another episode.

04 Rehearsal

The coach notes that M-07 supplied the answer immediately after asking a question; M-07 recognises the sequence but disputes its intent.

05 Repair phrase

Pause - I am not sure that fits. Both return to observable events and alternative explanations.

06 Review point

Check the agreement after session two and whenever the coachee's role or needs change.

Basis: H01 / R01 / R12 | Original executive application

X13

ACTIVITY

Participation, agency and expectations

Create realistic participation commitments while making voluntary choice, competing demands and the right to revise or stop visible.

Practical guide | Working form | Worked example

EXCEL TAB X13 Participation agency and ex

TIME 35 minutes

BRING Proposed session schedule | Actual workload and access constraints | Programme participation and exit terms

RUN THE ACTIVITY

01 Ask what the executive hopes coaching will offer and what they fear it may demand. Acknowledge uncertainty without promising transformation.

02 Explore actual time for sessions and between-session practice. Identify workload, travel, language or technology barriers that the programme can change.

03 Clarify what the coachee owns: topics, choices and agreed experiments. Explain what the coach owns: competent process, ethical boundaries and appropriate challenge.

QUESTIONS TO OPEN THINKING

What can you realistically commit to in the next fortnight?

What would make an assignment irrelevant or impossible?

How can you change or end this arrangement?

CONTINUE THE METHOD

04 Discuss what happens when practice is not completed. Agree to examine relevance and conditions rather than infer laziness or resistance.

05 Make the rematch, pause and exit routes concrete, including any programme reporting that follows. Do not describe a compulsory requirement as voluntary.

06 Record modest mutual commitments and one early check on whether the arrangement is working.

BOUNDARY & CAUTION

This is not a coachability assessment. Do not score willingness, infer character from missed homework or use participation to decide promotion.

BETWEEN SESSIONS / HAND-OFF

Test the practical commitment for one week and return with any changes needed to make it honest and useful.

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

BASIS H01 / H02 / R21 | Original executive application

X13 Participation, agency and expectations

ACTIVITY

Create realistic participation commitments while making voluntary choice, competing demands and the right to revise or stop visible.

Guide | **Worksheet** | Example

LIVE WORKSHEET

PARTICIPATION AND AGENCY CHOICE BOARD

○ **Yes, with clarity**	○ **Not yet**
○ **No**	○ **I need another route**

The coachee owns the choice. Record conditions and revisit the agreement when context changes.

01 Coachee expectation

02 Available time

03 Coachee commitment

04 Coach commitment

05 Missed-practice response

06 Pause or exit

Basis: H01 / H02 / R21 | Original executive application

X13 Participation, agency and expectations

ACTIVITY

Create realistic participation commitments while making voluntary choice, competing demands and the right to revise or stop visible.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

PARTICIPATION AND AGENCY CHOICE BOARD

○ **Yes, with clarity**	○ **Not yet**
○ **No**	○ **I need another route**

The coachee owns the choice. Record conditions and revisit the agreement when context changes.

01 Coachee expectation

A practical space to think through real decisions, not a weekly judgement of motivation.

02 Available time

Six scheduled sessions and one 20-minute practice slot most weeks, with travel exceptions.

03 Coachee commitment

Bring one real episode and choose a feasible experiment; say when a task does not fit.

04 Coach commitment

Explain methods, check relevance and distinguish systemic barriers from personal patterns.

05 Missed-practice response

Review opportunity, permission and value before changing the assignment; no automatic negative label.

06 Pause or exit

Use the programme owner's no-fault route; share attendance or closure status only as contracted.

Basis: H01 / H02 / R21 | Original executive application

X14

ACTIVITY

Session preparation and private learning record

Help the coachee arrive with a useful question and leave with a concise record they can control.

Practical guide | Working form | Worked example

EXCEL TAB X14 Session preparation and pri

TIME 15 minutes before; 10 minutes after each session

BRING A previous action or experiment | One current work episode | A private, approved storage location

RUN THE ACTIVITY

01 Before the session, ask the coachee to record the episode, the question and why it matters now. A brief note is enough; do not require a polished report.

02 Invite them to distinguish facts, interpretations and feelings they choose to discuss. Do not collect names or sensitive third-party details without need.

03 At the opening, ask what would make the time worthwhile and what has changed since preparation. The prepared topic may legitimately be replaced.

CONTINUE THE METHOD

04 Near the end, ask the coachee to summarise their insight in their own words. Check that it is theirs rather than a phrase they are repeating to please the coach.

05 Record the chosen action, boundary, support and review evidence. Include no action as a legitimate choice when reflection or a management clarification is the better next step.

06 Agree what will be retained, where and for how long. Prepare a separate, approved sponsor summary rather than sharing the private record.

QUESTIONS TO OPEN THINKING

What is the question beneath the topic?

What have you decided rather than merely discussed?

What should remain private?

BOUNDARY & CAUTION

One engagement per workbook copy. Hiding a tab is not access control; never send the whole working file to a sponsor.

BETWEEN SESSIONS / HAND-OFF

Use this record before and after the next session, keeping it short enough to sustain.

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

BASIS H01 / H04 / R01 | Original executive application

X14 Session preparation and private learning record

ACTIVITY

Help the coachee arrive with a useful question and leave with a concise record they can control.

BEFORE

01 Episode and question

02 Facts versus interpretation

03 Useful session outcome

AFTER / LEARNING

04 Learning in my words

05 Chosen next step

06 Private and shareable records

Basis: H01 / H04 / R01 | Original executive application

X14 Session preparation and private learning record

ACTIVITY

Help the coachee arrive with a useful question and leave with a concise record they can control.

BEFORE

01 Episode and question

M-07 rewrote a recommendation after late evidence. When is intervention necessary and when is it taking back ownership?

02 Facts versus interpretation

The evidence arrived one day late; the assumption was that the specialist had not thought ahead.

03 Useful session outcome

Identify an earlier checkpoint and a way to ask about the delay before intervening.

AFTER / LEARNING

04 Learning in my words

I can make the evidence deadline explicit without owning every draft.

05 Chosen next step

Agree a checkpoint with the specialist, then review one live recommendation after two weeks.

06 Private and shareable records

Keep personal assumptions in the private learning record; share only the agreed checkpoint and support request.

Basis: H01 / H04 / R01 | Original executive application

THE 6A WORKPLACE COACHING SYSTEM

03

Assess

Evidence improves the question

THE GATE

Is evidence sufficient and contextual?

MINIMUM OUTPUT

Goal + baseline + formulation

28 TOOLS & ACTIVITIES

Open the stage tool directory >

Assess: tools to use

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

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

BEFORE YOU MOVE ON

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

Assess: tools to use

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

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

BEFORE YOU MOVE ON

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

Evidence improves the question

Assess develops a proportionate, context-grounded understanding of the executive's goal. It combines the coachee's account with relevant work evidence and, only where useful, authorised assessment. It is not a requirement to administer a battery. The ebook keeps preference, judgement, experienced behaviour, reasoning and contextual evidence distinct. [H01, H04, H05]

Begin with episodes

Ask what happened, what the executive did, what others experienced and what the conditions allowed. Use examples and counterexamples. A lifeline, a decision reconstruction or a delegation review can reveal useful questions without creating a psychological label.

Select assessments by question

State the uncertainty an instrument might help explore. Confirm intended use, language, relevant population evidence, qualifications, accessibility and report access. A public catalogue confirms an offer, not validation. Do not recreate item banks or use coaching to train someone on protected assessment answers.

Interpret with humility

A preference is not capability. A scenario response is not a direct observation of daily work. A 360 report is a set of perspectives, with group protections and different observation opportunities. Agreement can strengthen a hypothesis; disagreement may identify context, not error.

Make the baseline usable

Define the behaviour, opportunity, observation window and evidence source. Preserve missing observations and changes in context. A count of sessions or a positive experience score is not a baseline for executive capability. Where individual goal anchors are used, define them before seeing the result.

Formulate collaboratively

Build a brief account of the pattern that may be maintaining the issue, including role, relationships and system conditions. State an alternative explanation and what would change the account. The coachee can revise or reject the formulation. Do not import clinical diagnosis into a work-development conversation.

Move from insight to a test

Choose a small practice or information-gathering step. A report is not the endpoint. Use the assessment-to-experiment bridge to specify behaviour, boundary, support and follow-up evidence. The best next step may be a management clarification rather than a more elaborate assessment.

ASSESS / OPERATING ROUTE

Choose the next useful move.

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

01

Understand the person in work

T25, T26, X15, X16, X21 / Episodes, strengths and context

02

Examine conditions

X19, X20, X25, X26, X28 / Time, relationships and constraints

03

Choose evidence carefully

T29, T30, X22, X23, X24 / Assessment selection and debrief

04

Set a meaningful goal

T31, T32, T33 / Goal, baseline and anchors

05

Build the shared hypothesis

T34, T35, T36, X30 / Formulation and next decision

GATE REVIEW

Is evidence sufficient and contextual? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

BASIS H01-H04 | Route selection is an original editorial aid

Purpose before instrument.

A review of 46 catalogue offerings, with independent coaching applications and routes into the activity library.

What this companion does

It identifies questions that an assessment may help explore and shows how a practitioner can move from an authorised report to a work experiment. The catalogue names are retained; the coaching routes and questions are original educational applications. Not every offer is appropriate for every executive.

What it does not establish

Public descriptions do not establish reliability, validity, suitable norms, language equivalence or permissions for a specific use. Obtain the current technical manual, qualifications, adjustments and authorised report. No protected item bank or scoring key is reproduced. [H01, H05, R04-R05]

Keep the evidence type visible

Preference describes a tendency; judgement concerns presented choices; a 360 concerns experienced behaviour; ability tests concern specified performance demands; simulations provide bounded evidence. They should not be added into a single psychological verdict.

Choose less when less is enough

Begin with the developmental question, existing evidence and the uncertainty that remains. A work episode, role clarification or stakeholder conversation may answer it without testing. Combined pathways need a reason for every component.

Debrief before acting

Check readiness, explain the report and invite the coachee's interpretation. Explore a strength, a discrepancy and a limitation using examples and counterexamples. Preserve rater protections and do not infer motives or clinical conditions.

Finish with work evidence

Use X24 to specify a hypothesis, practice, boundary and feedback source. A new work observation may be more useful than an immediate retest. Obtain a separate team contract before using team-level results; do not attribute aggregate findings to one leader.

BASIS H01 pp.85-88 / H05 / R04-R05 | Catalogue review, not technical validation

Find the relevant evidence: 1 of 3

Names identify catalogue offers. The suggested coaching use is this edition's interpretation, not an endorsement for a consequential decision.

Code	Catalogue name	Evidence lens	Activity route
CMA	Cultural Match Assessment	Culture-related preferences	X05, X18, X25
PSN	Personal Strengths Navigator	Relative strengths and preferences	X16, X17, X24
FCA	Full Career Assessment	Integrated career exploration	X01, X03, X07
BCA	Behavioural Competency Assessment	Competency-related assessment	X21, X24, X63
TCA	Technical Competency Assessment	Technical evidence	X01, X08, X63
LPQ	Learning Preference Questionnaire	Learning preferences	X14, X60, X66
CCA	Career Compass Assessment	Career exploration	X03, X05, X07
WSI	Work Styles Indicator	Work preferences	X17, X25, X34
CRA	Conflict Response Assessment	Conflict-response preferences	X27, X46, X48
PPP	Personality Pattern Profile	Personality-pattern self-report	X15, X24, X30
RMA	The Relate Map Assessment	Relationship preferences and needs	X25, X34, X59
PIP	Personal Insights Profile	Personal insight	X15, X24, X30
TWI	Team Workstyles Indicator	Team-level workstyle picture	X25, X56, X58
TCP	Team Contribution Profile	Team contribution lens	X25, X55, X59
TPW	Team Performance WatchPoints	Team conditions	X25, X28, X58
MMAC	Managerial Assumptions, Arguments and Conclusions	Reasoning and judgement	X21, X27, X43

BASIS H01 assessment companion / H05 catalogue | Confirm version, suitability and authorised administration

Find the relevant evidence: 2 of 3

Names identify catalogue offers. The suggested coaching use is this edition's interpretation, not an endorsement for a consequential decision.

Code	Catalogue name	Evidence lens	Activity route
MSJ	Managerial Situational Judgement Test	Scenario judgement	X21, X24, X46
5D16F	5 Dimension 16 Factor Assessment	Multidimensional management assessment	X24, X30, X63
LPP	Leadership Preference Profile	Relative leadership preference	X02, X17, X24
LSJ	Leadership Situational Judgement	Leadership scenario judgement	X21, X35, X52
LEAD360	Leadership 360 Feedback	Multi-source experienced behaviour	X22, X23, X64
CLA	Contextual Leadership Assessment	Task-specific leadership judgement	X26, X48, X55
SSA	Shadow Self Assessment	Pressure and strength-overuse patterns	X17, X39, X68
EQA	Emotional Intelligence Assessment	Work-related emotional capabilities	X39, X40, X46
NDR	Numerical and Data Reasoning Assessment	Reasoning performance	X21, X35, X65
AAR	Abstract and Adaptive Reasoning Assessment	Reasoning performance	X21, X27, X37
CPSA	Cognitive Processing and Learning Speed Assessment	Cognitive performance	X08, X24, X63
AAE	Attention, Accuracy and Error Detection Assessment	Accuracy-related performance	X19, X21, X63
EPPA	Executive Planning and Prioritisation Assessment	Planning and prioritisation judgement	X04, X20, X35
SRCPS	Systems Reasoning and Complex Problem Solving Assessment	Systems reasoning	X25, X27, X37
DSIM1	Direction Simulation	Simulation evidence	X02, X21, X37
DSIM2	Development Simulation	Simulation evidence	X24, X46, X55

BASIS H01 assessment companion / H05 catalogue | Confirm version, suitability and authorised administration

Find the relevant evidence: 3 of 3

Names identify catalogue offers. The suggested coaching use is this edition's interpretation, not an endorsement for a consequential decision.

Code	Catalogue name	Evidence lens	Activity route
DSIM3	Delivery Simulation	Simulation evidence	X04, X35, X56
AC03	Career Combination	Career exploration	X03, X05, X07
AC08	Combined Leadership Assessment	LSJ, competency-based interview and LPP	X21, X24, X30
AC06	General Leadership Development	LSJ, LPP and CLA	X17, X24, X55
AC05	General Management Development	MMAC, MSJ and 5D16F	X21, X24, X30
AC09	Graduate Potential Combination	Combined early-career evidence	X08, X24, X63
AC10	High Potential Ability Combination	Combined ability evidence	X08, X24, X37
AC07	Leadership Discovery Combination	LEAD360, EQA and SSA	X23, X24, X39
AC12	Managerial Execution Combination	Combined execution evidence	X04, X24, X56
AC11	Operational Reliability Combination	Combined operational evidence	X08, X21, X63
AC01	Personal Development Combination	Combined personal-development evidence	X15, X24, X30
AC02	Personal Discovery Combination	PSN, RMA and CRA	X17, X25, X48
AC13	Strategic Leadership Ability Combination	Combined reasoning evidence	X21, X35, X37
AC04	Team Combination	Combined team evidence	X25, X56, X58

BASIS H01 assessment companion / H05 catalogue | Confirm version, suitability and authorised administration

ASSESSMENT-TO-COACHING APPLICATION

CMA

Cultural Match Assessment

Culture-related preferences

COACHING QUESTION

Explore the relationship between personal work expectations and the culture experienced, without judging a person as a cultural misfit.

DEBRIEF PROMPTS

Does the described preference fit your actual work experience?

What in the environment helps or obstructs you?

Which expectation should be discussed rather than assumed?

ACTIVITY ROUTE

X05, X18, X25

NEXT WORK EVIDENCE

Ask for a concrete example of the desired working condition and negotiate one practical adjustment.

INTERPRETATION LIMIT

Not a licence to screen out difference or infer values from nationality.

PSN

Personal Strengths Navigator

Relative strengths and preferences

COACHING QUESTION

Explore useful contribution, energy and the dosage of a strength in a current executive challenge.

DEBRIEF PROMPTS

Where has this strength helped?

Where has it been too much or absent?

What complementary practice would the task need?

ACTIVITY ROUTE

X16, X17, X24

NEXT WORK EVIDENCE

Apply one recognised strength deliberately and seek feedback on its usefulness.

INTERPRETATION LIMIT

Relative preference does not establish superior capability or justify comparisons between people.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

FCA

Full Career Assessment

Integrated career exploration

COACHING QUESTION

Explore plausible career directions alongside aspirations, actual opportunities and role requirements.

DEBRIEF PROMPTS

What options does the report open?

What does it leave out about your circumstances?

What real evidence or conversation is needed next?

ACTIVITY ROUTE

X01, X03, X07

NEXT WORK EVIDENCE

Arrange one information interview or bounded role exploration.

INTERPRETATION LIMIT

Not a guarantee of suitability, promotion, employment or a vacancy.

BCA

Behavioural Competency Assessment

Competency-related assessment

COACHING QUESTION

Discuss development against an explicitly identified role model and appropriate level.

DEBRIEF PROMPTS

Which behaviour is being assessed?

What evidence from work supports or contradicts the pattern?

What task would let you practise it safely?

ACTIVITY ROUTE

X21, X24, X63

NEXT WORK EVIDENCE

Choose a role-relevant practice with feedback and review.

INTERPRETATION LIMIT

Retain the authorised competency taxonomy; a score is not a complete account of behaviour.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

TCA Technical Competency Assessment

Technical evidence

COACHING QUESTION

Clarify a technical development need that requires authorised specialist interpretation.

DEBRIEF PROMPTS

What is the technical requirement?

Who is qualified to interpret this result?

What instruction or supervised practice is needed?

ACTIVITY ROUTE

X01, X08, X63

NEXT WORK EVIDENCE

Refer the technical development action to a qualified owner while coaching supports planning and follow-through.

INTERPRETATION LIMIT

The coach must not confer technical competence, licence or authorisation.

LPQ Learning Preference Questionnaire

Learning preferences

COACHING QUESTION

Discuss how the coachee likes to approach learning and broaden their practice options.

DEBRIEF PROMPTS

What learning approach do you prefer?

When has a different approach worked?

Which method best fits this task?

ACTIVITY ROUTE

X14, X60, X66

NEXT WORK EVIDENCE

Test two suitable learning approaches against actual task performance.

INTERPRETATION LIMIT

Preferences do not establish fixed learning styles or unique instructional effectiveness.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

CCA

Career Compass Assessment

Career exploration

COACHING QUESTION

Examine interests, contribution and possible directions without overriding the executive's own aspirations.

DEBRIEF PROMPTS

What feels relevant and what does not?

Which aspiration is yours rather than someone else's?

What evidence would clarify an option?

ACTIVITY ROUTE

X03, X05, X07

NEXT WORK EVIDENCE

Build a small exploration plan, including real role information and constraints.

INTERPRETATION LIMIT

Do not prescribe a career path from a profile or treat specialist careers as lesser outcomes.

WSI

Work Styles Indicator

Work preferences

COACHING QUESTION

Explore communication, pace and decision habits as hypotheses to compare with actual episodes.

DEBRIEF PROMPTS

When does the description fit?

Where is your behaviour different?

What does the situation require beyond preference?

ACTIVITY ROUTE

X17, X25, X34

NEXT WORK EVIDENCE

Try one context-appropriate adjustment in a working relationship.

INTERPRETATION LIMIT

Avoid fixed types, compatibility scores or explaining every difficulty through style.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

CRA

Conflict Response Assessment

Conflict-response preferences

COACHING QUESTION

Explore a wider range of responses to a specific disagreement.

DEBRIEF PROMPTS

What is your usual response protecting?

What are the stakes and authority here?

What alternative could fit better?

ACTIVITY ROUTE

X27, X46, X48

NEXT WORK EVIDENCE

Rehearse and test a context-specific response.

INTERPRETATION LIMIT

No conflict mode is universally best; formal harm and safety issues are not style differences.

PPP

Personality Pattern Profile

Personality-pattern self-report

COACHING QUESTION

Use the report cautiously as language for reflection, with authorised interpretation and work evidence.

DEBRIEF PROMPTS

What do you recognise?

What is not captured by the profile?

What concrete work hypothesis could be tested?

ACTIVITY ROUTE

X15, X24, X30

NEXT WORK EVIDENCE

Select one behaviour, not a new identity, for practice.

INTERPRETATION LIMIT

Not clinical diagnosis, destiny or a basis for unsupported suitability decisions.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

RMA

The Relate Map Assessment

Relationship preferences and needs

COACHING QUESTION

Explore how the coachee expresses relationship needs and understands others' experience.

DEBRIEF PROMPTS

What do you need from this relationship?

How do others know that?

What should you ask rather than infer?

ACTIVITY ROUTE

X25, X34, X59

NEXT WORK EVIDENCE

Hold one explicit expectations conversation.

INTERPRETATION LIMIT

Do not infer another person's needs from the coachee's profile or create a compatibility verdict.

PIP

Personal Insights Profile

Personal insight

COACHING QUESTION

Develop a focused self-reflection question, checking report claims against lived work experience.

DEBRIEF PROMPTS

What is useful here?

What evidence would qualify the interpretation?

Which next action belongs to you?

ACTIVITY ROUTE

X15, X24, X30

NEXT WORK EVIDENCE

Translate one supported insight into a small work experiment.

INTERPRETATION LIMIT

Confirm the instrument version and technical basis; avoid treating broad descriptions as proof.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

TWI

Team Workstyles Indicator

Team-level workstyle picture

COACHING QUESTION

Explore a team-related coaching question using appropriate team consent and group interpretation.

DEBRIEF PROMPTS

What is a team pattern rather than your individual score?

Whose experience may be missing?

What team agreement could help?

ACTIVITY ROUTE

X25, X56, X58

NEXT WORK EVIDENCE

Use a separately contracted team conversation or a modest coordination experiment.

INTERPRETATION LIMIT

Aggregate team findings must not be assigned to one leader; use the published minimum and privacy rules.

TCP

Team Contribution Profile

Team contribution lens

COACHING QUESTION

Discuss complementary contributions and how the team allocates work.

DEBRIEF PROMPTS

Which contribution is visible or absent?

Is the gap capability, opportunity or allocation?

What agreement could improve it?

ACTIVITY ROUTE

X25, X55, X59

NEXT WORK EVIDENCE

Test a clearer contribution or responsibility agreement.

INTERPRETATION LIMIT

Do not assign fixed team roles or infer individual incapability from a group pattern.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

TPW Team Performance WatchPoints

Team conditions

COACHING QUESTION

Identify conditions worth investigating in a team-related development goal.

DEBRIEF PROMPTS

Which condition has evidence?

What could the team and system change?

What is outside an individual coaching contract?

ACTIVITY ROUTE

X25, X28, X58

NEXT WORK EVIDENCE

Route systemic concerns to the appropriate team or organisational owner.

INTERPRETATION LIMIT

A watchpoint is not a diagnosis or proof that the leader caused the condition.

MMAC Managerial Assumptions, Arguments and Conclusions

Reasoning and judgement

COACHING QUESTION

Practise distinguishing assumptions, evidence and argument quality in managerial decisions.

DEBRIEF PROMPTS

What is stated and what is assumed?

What would weaken the conclusion?

What evidence would change your decision?

ACTIVITY ROUTE

X21, X27, X43

NEXT WORK EVIDENCE

Use a prospective decision journal and a checking question.

INTERPRETATION LIMIT

Do not infer personality, integrity or character from a reasoning result.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

MSJ — Managerial Situational Judgement Test

Scenario judgement

COACHING QUESTION

Explore reasoning in managerial situations and rehearse comparable, new work challenges.

DEBRIEF PROMPTS

Why did the response seem effective?

What competing demand did it address?

How does the actual work context differ?

ACTIVITY ROUTE

X21, X24, X46

NEXT WORK EVIDENCE

Rehearse a new, role-relevant situation and gather workplace evidence.

INTERPRETATION LIMIT

Preserve the report's published structure; do not silently relabel its domains.

5D16F — 5 Dimension 16 Factor Assessment

Multidimensional management assessment

COACHING QUESTION

Explore a specific management-development question with the authorised manual and report.

DEBRIEF PROMPTS

What exactly does this scale claim to assess?

What evidence supports this use?

What practical learning question follows?

ACTIVITY ROUTE

X24, X30, X63

NEXT WORK EVIDENCE

Choose a bounded practice after qualified interpretation.

INTERPRETATION LIMIT

The name alone does not establish the constructs, validity or permissible decisions.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

LPP

Leadership Preference Profile

Relative leadership preference

COACHING QUESTION

Explore attention across Direction, Development and Delivery without equating preference with capability.

DEBRIEF PROMPTS

Where is attention naturally drawn?

What does the current role require?

What deliberate contribution could you practise?

ACTIVITY ROUTE

X02, X17, X24

NEXT WORK EVIDENCE

Select one less-emphasised but relevant contribution for a work experiment.

INTERPRETATION LIMIT

Do not seek numerical balance for its own sake or infer absolute competence.

LSJ

Leadership Situational Judgement

Leadership scenario judgement

COACHING QUESTION

Explore choices and trade-offs in leadership situations, then practise comparable original scenarios.

DEBRIEF PROMPTS

What made the choice attractive?

What longer-term consequence mattered?

What does real work add to the scenario?

ACTIVITY ROUTE

X21, X35, X52

NEXT WORK EVIDENCE

Rehearse a new decision and review the reasoning, not protected answers.

INTERPRETATION LIMIT

No coaching of live item answers; scenario scores do not perfectly describe workplace behaviour.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

LEAD360 Leadership 360 Feedback

Multi-source experienced behaviour

COACHING QUESTION

Examine differences between self-view and others' experience with privacy protections intact.

DEBRIEF PROMPTS

What differs across observation groups?

What episode could explain it?

What practice could colleagues observe next?

ACTIVITY ROUTE

X22, X23, X64

NEXT WORK EVIDENCE

Use one behavioural experiment and a targeted, consented follow-up.

INTERPRETATION LIMIT

Never identify raters or treat all perspectives as interchangeable; retain authorised group thresholds.

CLA Contextual Leadership Assessment

Task-specific leadership judgement

COACHING QUESTION

Explore how direction and support can be adapted to a particular person's task and circumstances.

DEBRIEF PROMPTS

What does this task require?

What capability and support are available?

What would a clearer agreement change?

ACTIVITY ROUTE

X26, X48, X55

NEXT WORK EVIDENCE

Run a bounded delegation or support experiment.

INTERPRETATION LIMIT

Do not label a colleague permanently as low readiness or infer a fixed leadership style.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

SSA Shadow Self Assessment

Pressure and strength-overuse patterns

COACHING QUESTION

Explore a possible trigger-response pattern without pathologising the executive.

DEBRIEF PROMPTS

What pressure cue do you recognise?

What does the pattern protect?

What alternative response is safe to test?

ACTIVITY ROUTE

X17, X39, X68

NEXT WORK EVIDENCE

Agree an early warning cue and a bounded response plan.

INTERPRETATION LIMIT

Non-clinical; not evidence of psychological danger, disorder or employment unfitness.

EQA Emotional Intelligence Assessment

Work-related emotional capabilities

COACHING QUESTION

Explore a specific emotional or interpersonal work behaviour, using authorised interpretation.

DEBRIEF PROMPTS

What happens in the work episode?

What is within your choice?

What support or boundary is needed?

ACTIVITY ROUTE

X39, X40, X46

NEXT WORK EVIDENCE

Rehearse a response and review the experienced impact.

INTERPRETATION LIMIT

Not a mental-health diagnosis or a substitute for qualified support.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

NDR Numerical and Data Reasoning Assessment

Reasoning performance

COACHING QUESTION

Clarify a development question about interpreting work data, where assessment is genuinely relevant.

DEBRIEF PROMPTS

What reasoning demand matters in your role?

Which errors or uncertainties need instruction?

What work task can test learning?

ACTIVITY ROUTE

X21, X35, X65

NEXT WORK EVIDENCE

Use relevant data-analysis training and a supported work example.

INTERPRETATION LIMIT

Ability evidence requires technical interpretation; do not infer motivation or personality.

AAR Abstract and Adaptive Reasoning Assessment

Reasoning performance

COACHING QUESTION

Explore a specific need to recognise patterns and adapt reasoning to new information.

DEBRIEF PROMPTS

What task does this evidence relate to?

What does it not predict?

What supported practice is relevant?

ACTIVITY ROUTE

X21, X27, X37

NEXT WORK EVIDENCE

Combine instruction or practice with a real decision review.

INTERPRETATION LIMIT

Not a global measure of executive potential or proof of everyday adaptability.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

CPSA — Cognitive Processing and Learning Speed Assessment

Cognitive performance

COACHING QUESTION

Consider a narrowly defined learning or processing question with appropriate accommodations.

DEBRIEF PROMPTS

Is speed actually required by the task?

What access conditions affect interpretation?

What support is useful?

ACTIVITY ROUTE

X08, X24, X63

NEXT WORK EVIDENCE

Arrange task-relevant learning support rather than a generic confidence exercise.

INTERPRETATION LIMIT

Do not infer intelligence or employability beyond the authorised evidence and intended use.

AAE — Attention, Accuracy and Error Detection Assessment

Accuracy-related performance

COACHING QUESTION

Explore accuracy demands in a relevant task and the work conditions supporting them.

DEBRIEF PROMPTS

What errors matter in this task?

Which system controls are needed?

What practice or checking routine would help?

ACTIVITY ROUTE

X19, X21, X63

NEXT WORK EVIDENCE

Design a supported quality check in actual work.

INTERPRETATION LIMIT

Do not treat one test as proof of reliability, medical status or safety authorisation.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

EPPA

Executive Planning and Prioritisation Assessment

Planning and prioritisation judgement

COACHING QUESTION

Explore sequencing, constraints and replanning in a complex work task.

DEBRIEF PROMPTS

What did you prioritise and why?

Which constraint changed the plan?

What would you stop or resequence?

ACTIVITY ROUTE

X04, X20, X35

NEXT WORK EVIDENCE

Use a live priority review and prospective decision record.

INTERPRETATION LIMIT

Check current pilot and technical status; do not present it as validated prediction of executive performance.

SRCPS

Systems Reasoning and Complex Problem Solving Assessment

Systems reasoning

COACHING QUESTION

Explore a bounded question about interdependencies and competing explanations.

DEBRIEF PROMPTS

Which relationship did you notice?

What alternative explanation was missed?

What evidence could test the system hypothesis?

ACTIVITY ROUTE

X25, X27, X37

NEXT WORK EVIDENCE

Map one real dependency and test a checking question.

INTERPRETATION LIMIT

A test is not a complete organisational diagnosis or licence to redesign a system alone.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

DSIM1 Direction Simulation

Simulation evidence

COACHING QUESTION

Discuss strategic framing and judgement using authorised simulation feedback.

DEBRIEF PROMPTS

What decision did the simulation require?

Which evidence changed your view?

How does the real role differ?

ACTIVITY ROUTE

X02, X21, X37

NEXT WORK EVIDENCE

Rehearse a new strategic decision and review work evidence.

INTERPRETATION LIMIT

Simulation performance is not actual business achievement or complete succession readiness.

DSIM2 Development Simulation

Simulation evidence

COACHING QUESTION

Explore people-development and stakeholder choices in a supported developmental context.

DEBRIEF PROMPTS

What did the response enable for others?

What context was missing?

What behaviour could be practised safely?

ACTIVITY ROUTE

X24, X46, X55

NEXT WORK EVIDENCE

Use a delegation or feedback experiment with consent.

INTERPRETATION LIMIT

Retain simulation scoring and privacy rules; avoid training participants on protected answers.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

DSIM3 Delivery Simulation

Simulation evidence

COACHING QUESTION

Explore execution, prioritisation and accountability in realistic work decisions.

DEBRIEF PROMPTS

What did you prioritise?

What risk or dependency mattered?

What would you change in a real work routine?

ACTIVITY ROUTE

X04, X35, X56

NEXT WORK EVIDENCE

Test an accountable decision or handover routine.

INTERPRETATION LIMIT

Do not equate successful simulation completion with operational authorisation.

AC03 Career Combination

Career exploration

COACHING QUESTION

Use only when the combined career evidence adds something to a specific aspiration or transition question.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X03, X05, X07

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

AC08 Combined Leadership Assessment

LSJ, competency-based interview and LPP

COACHING QUESTION

Clarify whether the process is developmental or consequential before combining judgement, interview and preference evidence.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X21, X24, X30

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC06 General Leadership Development

LSJ, LPP and CLA

COACHING QUESTION

Explore leadership judgement, natural emphasis and task-specific adaptation as distinct evidence.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X17, X24, X55

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

AC05 General Management Development

MMAC, MSJ and 5D16F

COACHING QUESTION

Keep reasoning, scenario judgement and the multidimensional report distinct in a management-development question.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X21, X24, X30

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC09 Graduate Potential Combination

Combined early-career evidence

COACHING QUESTION

Usually not the first choice for an established executive; require a specific role-transition rationale.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X08, X24, X63

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

AC10 High Potential Ability Combination

Combined ability evidence

COACHING QUESTION

Use only for a clearly defined cognitive-development question with qualified interpretation, not an informal potential label.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X08, X24, X37

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC07 Leadership Discovery Combination

LEAD360, EQA and SSA

COACHING QUESTION

Compare experienced behaviour, emotional capability and pressure patterns without assuming one causes another.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X23, X24, X39

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

AC12

Managerial Execution Combination

Combined execution evidence

COACHING QUESTION

Explore a specific planning or execution question rather than purchasing a battery by default.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X04, X24, X56

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC11

Operational Reliability Combination

Combined operational evidence

COACHING QUESTION

Relevant only where the executive's development question genuinely concerns the assessed work demands.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X08, X21, X63

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

ASSESSMENT-TO-COACHING APPLICATION

AC01 Personal Development Combination

Combined personal-development evidence

COACHING QUESTION

Choose a limited developmental question and explain what each component contributes.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X15, X24, X30

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC02 Personal Discovery Combination

PSN, RMA and CRA

COACHING QUESTION

Explore contribution, relationship needs and disagreement as complementary perspectives.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X17, X25, X48

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

AC13 Strategic Leadership Ability Combination

Combined reasoning evidence

COACHING QUESTION

Explore specific strategic reasoning demands, not a single verdict about leadership quality.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X21, X35, X37

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC04 Team Combination

Combined team evidence

COACHING QUESTION

Requires a separate team purpose, consent and facilitation design; not a proxy rating of the individual leader.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X25, X56, X58

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

BASIS H01 pp.85-88 / H05 / R04-R05 | Original coaching applications; use authorised reports

T25

TOOL

Readiness and expectations check

Test fit, motivation, capacity and misconceptions.

Practical guide | Working form | Worked example

EXCEL TAB T25 Readiness and expectations

TIME 25-40 minutes before goals are agreed; revisit after a major context, capacity or risk change. | OWNER Coach

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Ask why coaching is proposed now and distinguish the coachee's reasons from the sponsor's.

02 Test genuine choice, ownership and expectations, correcting misconceptions about advice, therapy or performance control.

03 Assess practical capacity: time, energy, opportunity to practise and manager or system support.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Equating manager nomination with participant ownership and readiness; Ignoring workload, energy or opportunity because coaching sessions fit the calendar; Using coaching to bypass transparency about a grievance or formal performance process.

CONTINUE THE METHOD

04 Identify active conflict, health, conduct, legal or safeguarding issues and agree any access adjustments.

05 Make and explain a proceed, adapt, defer or refer decision, including the next review point.

BOUNDARY & CAUTION

Do not use readiness language to blame, exclude or coerce someone whose real barrier is workload, access, power or an unresolved organisational process.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.127

T25

TOOL

Readiness and expectations check

Test fit, motivation, capacity and misconceptions.

Practical guide | Working form | Worked example

EXCEL TAB T25 Readiness and expectations

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

Reason now Why coaching and why now	
Ownership Whose idea and level of choice	
Expectation What coaching is expected to do	
Capacity Time, energy and opportunity	
Concern Risk, conflict or active process	
Access Adjustments or preferences	
Fit decision Proceed, adapt, defer or refer	

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

T25

TOOL

Readiness and expectations check

Test fit, motivation, capacity and misconceptions.

Practical guide | Working form | Worked example

EXCEL TAB T25 Readiness and expectations

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Reason now Why coaching and why now	Director M-07 faces two contested MetroLink East gates before year-end and wants earlier practice with challenge.
Ownership Whose idea and level of choice	The line manager suggested coaching, but the director chose to participate and selected the final development focus.
Expectation What coaching is expected to do	Use coaching to test assumptions and rehearse stakeholder conversations, not obtain technical answers or sponsor approval.
Capacity Time, energy and opportunity	Ninety minutes monthly is protected; live gate work provides experiments, though September shutdown planning may constrain energy.
Concern Risk, conflict or active process	A current commercial disagreement requires clear boundaries so coaching cannot become evidence in contract or performance decisions.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T26

TOOL

Person-role-system scan

Prevent personal development from ignoring role and system causes.

Practical guide | Working form | Worked example

EXCEL TAB T26 Personrolesystem scan

TIME 45-60 minutes early in coaching, then 15-20 minutes when progress stalls or the context shifts. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Describe the challenge first at person level: strengths, skills, beliefs, wellbeing and agency.

02 Examine role clarity, authority, workload, interfaces and the relationships shaping the pattern.

03 Map structural, cultural, incentive, resource and wider-context forces without treating assumptions as facts.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Separate what the coachee controls, can influence or can only surface to an accountable owner.

05 Choose one personal experiment and one organisational escalation or support action where indicated.

BOUNDARY & CAUTION

Do not convert systemic causes into a personal deficit or imply that coaching can fix authority, resource, workload or conduct problems it does not control.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.130

T26 Person-role-system scan

TOOL

Prevent personal development from ignoring role and system causes.

Guide **Worksheet** Example LIVE WORKSHEET

Person Strengths, skills, beliefs, wellbeing and agency

Role Clarity, authority, workload and interfaces

System Structure, incentives, culture and resources

Relationships Stakeholders, trust, conflict and support

Context Change, market, community and identity

Leverage What the coachee can influence

Escalate What requires organisational action

Basis: H01 / H04 | H04 source p.130

T26 Person-role-system scan

TOOL

Prevent personal development from ignoring role and system causes.

Guide Worksheet Example FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Person Strengths, skills, beliefs, wellbeing and agency

Director M-07 brings strong systems knowledge and calm analysis, but hesitates to challenge senior commercial assumptions early.

Role Clarity, authority, workload and interfaces

Accountable for delivery integration, yet approval authority for contingency transfers remains ambiguous above GBP5 million.

System Structure, incentives, culture and resources

Gate templates reward certainty, decision rights overlap and schedule pressure discourages surfacing incomplete evidence.

Relationships Stakeholders, trust, conflict and support

Engineering trust is high; dialogue with Commercial is guarded, while the line manager supports experimentation.

Context Change, market, community and identity

MetroLink East faces public scrutiny, supplier renegotiation and a fixed possession window before winter.

Leverage What the coachee can influence

Not populated in the original worked extract.

Escalate What requires organisational action

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.130

T27

TOOL

Strengths evidence map

Ground strengths in situations, outcomes and feedback.

Practical guide | Working form | Worked example

EXCEL TAB T27 Strengths evidence map

TIME 30-45 minutes in discovery, with a 10-minute update after significant application or feedback. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Name one specific strength rather than a broad personality label.

02 Capture a situation-behaviour-result example and corroborating feedback or work evidence.

03 Note whether using the strength creates energy, meaning or depletion for the coachee.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Naming a flattering trait without a specific situation, behaviour and result; Ignoring how a valued strength becomes limiting when overused or mistimed; Prescribing the same strength in every context instead of testing fit.

CONTINUE THE METHOD

04 Identify contexts where the strength is valued, constrained or risky when overused.

05 Design a goal-relevant application and define what effective, not excessive, use will look like.

BOUNDARY & CAUTION

Do not use uncorroborated labels or strengths positivity to bypass capability gaps, overuse risks, harm or difficult contextual evidence.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.133

T27

TOOL

Strengths evidence map

Ground strengths in situations, outcomes and feedback.

Practical guide | Working form | Worked example

EXCEL TAB T27 Strengths evidence map

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

Strength Specific capability or quality	
Evidence Situation, behaviour and result	
Energy Effect on energy and meaning	
Overuse Risk when overapplied	
Context Where it is valued or constrained	
Application How it supports the goal	

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

T27

TOOL

Strengths evidence map

Ground strengths in situations, outcomes and feedback.

Practical guide | Working form | Worked example

EXCEL TAB T27 Strengths evidence map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Strength Specific capability or quality	Translates complex engineering dependencies into concise sequences that non-technical stakeholders can understand and interrogate.
Evidence Situation, behaviour and result	At the utilities review, M-07 visualised three dependencies, enabling agreement on a resequenced works package.
Energy Effect on energy and meaning	Complex integration work is absorbing and meaningful; repetitive sponsor reassurance drains attention before key decisions.
Overuse Risk when overapplied	Detailed analysis can delay an early directional conversation and leave commercial colleagues feeling presented with conclusions.
Context Where it is valued or constrained	Most valuable before design freezes; constrained when executives need a timely recommendation under incomplete information.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T28

TOOL

Critical moments analysis

Identify the situations in which behaviour matters most.

Practical guide | Working form | Worked example

EXCEL TAB T28 Critical moments analysis

TIME 35-50 minutes per priority moment; review after the next two or three real occurrences. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Select a recurring meeting, decision, conflict or transition where the target behaviour matters.

02 Reconstruct its trigger, observable current response and consequences for self, others and work.

03 Specify the desired response in language that an observer could recognise.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Analysing a general story rather than one observable, consequential work moment; Writing the desired response as communicate better or show more confidence; Ignoring how the current response affects other people and delivery outcomes.

CONTINUE THE METHOD

04 Diagnose whether the main constraint is skill, belief, emotion, power or the surrounding system.

05 Plan the next in-context test and the evidence to collect immediately afterwards.

BOUNDARY & CAUTION

Do not generalise from a single reconstructed incident when memory, role power or missing stakeholder evidence could materially change the pattern.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.136

T28

TOOL

Critical moments analysis

Identify the situations in which behaviour matters most.

Practical guide | Working form | Worked example

EXCEL TAB T28 Critical moments analysis

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

Moment Meeting, decision, conflict or transition	
Trigger What starts the pattern	
Current response Observable behaviour	
Consequence For self, others and work	
Desired response Specific alternative	
Constraint Skill, belief, emotion, power or system	
Evidence What success would look like	

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

T28

TOOL

Critical moments analysis

Identify the situations in which behaviour matters most.

Practical guide | Working form | Worked example

EXCEL TAB T28 Critical moments analysis

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Moment Meeting, decision, conflict or transition	Monthly capital-gate meeting when Commercial challenges the proposed contingency before the investment recommendation is finalised.
Trigger What starts the pattern	A senior sponsor asks for immediate cost certainty despite unresolved ground-condition evidence.
Current response Observable behaviour	M-07 adds technical detail, answers every objection and postpones naming the underlying decision-right conflict.
Consequence For self, others and work	The room debates estimates, dissent goes underground and the recommendation returns for costly rework.
Desired response Specific alternative	State uncertainty, compare two options, invite the commercial concern and agree owner, threshold and decision date.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T29

TOOL

Stakeholder perspective plan

Gather useful stakeholder evidence without turning coaching into surveillance.

Practical guide | Working form | Worked example

EXCEL TAB T29 Stakeholder perspective pla

TIME 30-45 minutes to plan, 15-30 minutes per stakeholder, and 30 minutes to interpret the combined evidence. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Choose only stakeholders whose perspective is relevant to the agreed behavioural question.

02 Write one narrow, neutral inquiry and select interview, pulse, observation or feedback as the method.

03 Agree who knows the purpose, what will be attributable and how consent can be withdrawn.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Collect responses consistently, noting role, power, opportunity to observe and other bias sources.

05 Triangulate themes with context and convert insight into a coachee-owned experiment, not a verdict.

BOUNDARY & CAUTION

Do not gather stakeholder views secretly, solicit broad character judgements or repurpose coaching feedback for appraisal or surveillance.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.139

T29

TOOL

Stakeholder perspective plan

Gather useful stakeholder evidence without turning coaching into surveillance.

Practical guide | Working form | Worked example

EXCEL TAB T29 Stakeholder perspective pla

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

Stakeholder Whose perspective matters	
Question Narrow behavioural inquiry	
Method Interview, pulse, observation or feedback	
Consent Who knows what	
Interpretation Bias and context	
Use How insight will inform action	

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

T29

TOOL

Stakeholder perspective plan

Gather useful stakeholder evidence without turning coaching into surveillance.

Practical guide | Working form | Worked example

EXCEL TAB T29 Stakeholder perspective pla

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Stakeholder Whose perspective matters	Commercial Director, whose support is essential for contingency recommendations and timely supplier negotiations.
Question Narrow behavioural inquiry	When I frame a contested gate decision, which observable behaviour helps or hinders your constructive challenge?
Method Interview, pulse, observation or feedback	Fifteen-minute structured interview conducted by the evaluator before coaching and repeated at ninety-day follow-up.
Consent Who knows what	M-07 approves the stakeholder and question; the respondent knows themes inform coaching but comments are not verbatim reports.
Interpretation Bias and context	One influential view is a hypothesis shaped by commercial incentives, recent conflict and recall, not objective truth.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T30

TOOL

Psychometric use check

Use assessments responsibly within their evidence and purpose limits.

Practical guide | Working form | Worked example

EXCEL TAB T30 Psychometric use check

TIME 45-75 minutes for selection review, plus standard administration and a 60-90 minute qualified feedback session. | OWNER Qualified practitioner

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Define the decision need and confirm that an assessment would add information unavailable by simpler means.

02 Match the intended construct to evidence on reliability, validity, norms, language and target population.

03 Confirm qualified administration, standard conditions and reasonable access adjustments.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Agree consent, data access, retention and the explicit boundary against unsupported selection or diagnosis.

05 Interpret scores with uncertainty and alternative hypotheses, then debrief them alongside contextual evidence.

BOUNDARY & CAUTION

Do not use an instrument outside its validated purpose, population, qualified-use conditions or authority for selection, diagnosis or high-stakes decisions.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.142

T30

TOOL

Psychometric use check

Use assessments responsibly within their evidence and purpose limits.

Practical guide | Working form | Worked example

EXCEL TAB T30 Psychometric use check

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

Due-diligence criterion	Evidence / source	Pass / adapt / fail	Decision / control
Decision need is legitimate			
Construct matches need			
Reliability evidence			
Validity for intended use			
Norm/population relevance			
Language and accessibility			
Qualified administration			
Interpretation and uncertainty			
Data/consent/retention			
Employment-use boundary			

T30

TOOL

Psychometric use check

Use assessments responsibly within their evidence and purpose limits.

Practical guide | Working form | Worked example

EXCEL TAB T30 Psychometric use check

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision need Why an assessment is considered	Explore pressure-related decision habits only if an assessment adds insight beyond behavioural evidence already available.
Construct What is measured	The proposed vendor profile claims to measure decisiveness, challenge orientation and tolerance of ambiguity.
Evidence Reliability, validity and norms for intended use	The vendor supplied testimonials but no adequate reliability, predictive-validity or adverse-impact evidence for this decision.
Population Language and relevance	No relevant norms exist for UK infrastructure project directors or the programme's multilingual participant group.
Administration Standardisation and access	Do not administer; use consented behavioural interviews and critical-moment analysis, then revisit if qualified evidence emerges.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T31

TOOL

Goal architecture canvas

Create a goal that connects meaning, behaviour, evidence and context.

Practical guide | Working form | Worked example

EXCEL TAB T31 Goal architecture canvas

TIME 45-60 minutes after discovery, with 15-minute reviews at agreed milestones. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 State the desired change in the coachee's own words and explore its personal meaning.

02 Connect it to legitimate work priorities without substituting the sponsor's agenda.

03 Translate the outcome into observable target behaviour in named critical situations.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Writing only a business outcome without a behaviour the coachee can practise; Allowing sponsor wording to replace the coachee's meaning and ownership; Omitting the situations, evidence and constraints that make the goal testable.

CONTINUE THE METHOD

04 Choose proportionate self, stakeholder and work evidence, plus the support needed to practise.

05 Set the review date, ownership and rule for adapting the goal when evidence or context changes.

BOUNDARY & CAUTION

Do not finalise an elegant individual goal when the required opportunity, authority, support or organisational ownership is absent.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.145

T31

TOOL

Goal architecture canvas

Create a goal that connects meaning, behaviour, evidence and context.

Practical guide | Working form | Worked example

EXCEL TAB T31 Goal architecture canvas

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

Desired change Outcome in the coachee's words	
Meaning Why it matters	
Strategic relevance Connection to work	
Target behaviour What will be done differently	
Situations Where behaviour must occur	
Evidence Self, stakeholder and work indicators	
Support Opportunity and resources	
Review Date and adaptation rule	

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

T31

TOOL

Goal architecture canvas

Create a goal that connects meaning, behaviour, evidence and context.

Practical guide | Working form | Worked example

EXCEL TAB T31 Goal architecture canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Desired change Outcome in the coachee's words	I make contested capital-gate recommendations clearer, earlier and easier for others to challenge constructively.
Meaning Why it matters	This protects delivery credibility, reduces avoidable rework and lets me lead uncertainty without pretending certainty.
Strategic relevance Connection to work	The goal supports Meridian's handover reliability priority and the pilot's defined decision-quality mechanism.
Target behaviour What will be done differently	State criteria, distinguish evidence from assumption, surface two options, invite dissent and confirm accountable ownership.
Situations Where behaviour must occur	MetroLink East investment gates, weekly commercial reviews and any escalation exceeding the agreed contingency threshold.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T32

TOOL

Baseline evidence record

Create a proportionate starting point for later comparison.

Practical guide | Working form | Worked example

EXCEL TAB T32 Baseline evidence record

TIME 30-60 minutes before intervention; data-quality review before comparison and whenever the measure changes. | OWNER Coach/evaluation lead

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Define the outcome and choose the least intrusive source and method capable of indicating it.

02 Record the baseline value, collection date, unit, population and any missingness or uncertainty.

03 Document concurrent events and conditions that could distort later comparison.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Constructing a retrospective baseline after participants already changed their behaviour; Changing the measure or scoring rule midway without documenting the effect; Presenting a small pre-post movement as proof that coaching caused it.

CONTINUE THE METHOD

04 Set a direction or threshold without implying that coaching alone will cause the change.

05 Restrict access, schedule the comparison and preserve the same measure unless a change is documented.

BOUNDARY & CAUTION

Do not present a weak, shifting or inaccessible baseline as proof that coaching caused a later organisational outcome.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.148

T32

TOOL

Baseline evidence record

Create a proportionate starting point for later comparison.

Practical guide | Working form | Worked example

EXCEL TAB T32 Baseline evidence record

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

Outcome Defined indicator	
Measure Source and method	
Value Baseline and date	
Quality Completeness and limitations	
Context Concurrent events	
Target Direction or threshold	
Access Who may see the data	

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

T32

TOOL

Baseline evidence record

Create a proportionate starting point for later comparison.

Practical guide | Working form | Worked example

EXCEL TAB T32 Baseline evidence record

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Outcome Defined indicator	Percentage of sampled capital-gate recommendations requiring avoidable reframing before a decision can be recorded.
Measure Source and method	Independent reviewer applies the agreed five-item quality rubric to consecutive eligible gate papers and minutes.
Value Baseline and date	Baseline is 58 percent, seven of twelve sampled recommendations, measured on 31 August 2026.
Quality Completeness and limitations	Small sample and moderate reviewer judgement limit precision; two reviewers calibrated on four papers.
Context Concurrent events	A new gate template and parallel authority redesign begin during the pilot, preventing simple attribution to coaching.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T33

TOOL

Goal attainment scale

Define meaningful levels of progress before action.

Practical guide | Working form | Worked example

EXCEL TAB T33 Goal attainment scale

TIME 30-45 minutes to anchor one goal, then 15-20 minutes at the stated review date. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Write one bounded goal and describe the observable expected outcome at level 0.

02 Anchor -1 and -2 as progressively less progress using the same evidence dimension.

03 Anchor +1 and +2 as credible additional progress, not unrelated stretch outcomes.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using vague anchors that different reviewers cannot recognise consistently; Setting the expected outcome so low that ordinary activity counts as success; Rewriting anchors after results are known to create a favourable score.

CONTINUE THE METHOD

04 Test that all five levels are distinct, ordered and recognisable by the agreed evidence source.

05 Set the review date and rate against evidence before discussing why the result occurred.

BOUNDARY & CAUTION

Do not use Goal Attainment Scaling with vague, overlapping anchors or change the scale after seeing the result to manufacture progress.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.151

T33

TOOL

Goal attainment scale

Define meaningful levels of progress before action.

Practical guide | Working form | Worked example

EXCEL TAB T33 Goal attainment scale

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

Level	Behaviourally specific outcome	Evidence source
+2 Much more than expected		
+1 Somewhat more than expected		
0 Expected outcome		
-1 Somewhat less than expected		
-2 Much less than expected		

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

T33

TOOL

Goal attainment scale

Define meaningful levels of progress before action.

Practical guide | Working form | Worked example

EXCEL TAB T33 Goal attainment scale

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal Single defined goal	Frame and secure constructive decisions at M-07's two scheduled MetroLink East capital gates.
-2 Much less than expected	Neither gate reaches decision; criteria remain implicit and both recommendations return for major reframing.
-1 Somewhat less than expected	One gate reaches decision, but dissent is invited late or ownership and escalation thresholds remain unclear.
0 Expected outcome	Both gates record criteria, alternatives, invited challenge, an accountable owner and agreed escalation threshold.
+1 Somewhat more than expected	Expected standard is met, and stakeholders independently cite earlier issue surfacing with no avoidable reframing.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T34

TOOL

Barrier and leverage map

Choose the highest-leverage constraints to address.

Practical guide | Working form | Worked example

EXCEL TAB T34 Barrier and leverage map

TIME 35-50 minutes, followed by a 15-minute evidence review after the first leverage experiment. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 List forces maintaining the current pattern and place each at person, relationship, role, system or context level.

02 Classify each barrier as within control, influence or concern and name the accountable owner.

03 Test the claimed barrier against examples, counterexamples and available organisational evidence.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Select the smallest ethical action likely to shift the barrier or reveal useful information.

05 Run the leverage experiment, review its evidence and escalate structural constraints to the right owner.

BOUNDARY & CAUTION

Do not ask the coachee to experiment around a barrier that requires formal authority, safeguarding, health, legal or organisational action.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.154

T34

TOOL

Barrier and leverage map

Choose the highest-leverage constraints to address.

Practical guide | Working form | Worked example

EXCEL TAB T34 Barrier and leverage map

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

Barrier Specific force maintaining the current pattern	
Level Person, relationship, role, system or context	
Control Control, influence or concern	
Evidence How we know	
Leverage Small action with useful information	
Owner Coachee, manager, sponsor or organisation	

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

T34

TOOL

Barrier and leverage map

Choose the highest-leverage constraints to address.

Practical guide | Working form | Worked example

EXCEL TAB T34 Barrier and leverage map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Barrier Specific force maintaining the current pattern	M-07 expects early challenge to be read as insufficient control, so waits for near-complete evidence.
Level Person, relationship, role, system or context	Person belief interacts with sponsor expectations and an organisational template that rewards confident single recommendations.
Control Control, influence or concern	M-07 controls framing, can influence sponsor dialogue, but cannot alone change formal investment authority.
Evidence How we know	Three gate records show late alternatives; stakeholder interviews describe strong analysis but delayed surfacing of uncertainty.
Leverage Small action with useful information	Open the next commercial review with decision criteria and two unresolved assumptions, then ask what needs early escalation.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T35

TOOL

Learning preference and access profile

Adapt coaching without stereotyping or unnecessary diagnosis.

Practical guide | Working form | Worked example

EXCEL TAB T35 Learning preference and acc

TIME 25-40 minutes during early contracting; check effectiveness after two sessions and whenever needs or delivery mode change. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Ask how verbal, visual, written, movement or blended formats support the individual's processing.

02 Agree pace, reflection time, question load, language, directness and feedback preferences.

03 Identify sensory, privacy, technology, scheduling, energy and caring constraints.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Treating a preferred format as a fixed and scientifically proven learning style; Collecting diagnosis or identity details when functional access needs are enough; Sharing the access profile beyond those arranging the agreed adjustments.

CONTINUE THE METHOD

04 Convert stated needs into specific delivery adjustments without requesting unnecessary diagnosis.

05 Try the adjustments, ask what actually helped and revise the profile from experience.

BOUNDARY & CAUTION

Do not label people with fixed 'learning styles', demand diagnostic disclosure or assume a stated preference is automatically an effective adjustment.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.157

T35

TOOL

Learning preference and access profile

Adapt coaching without stereotyping or unnecessary diagnosis.

Practical guide | Working form | Worked example

EXCEL TAB T35 Learning preference and acc

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

Format Verbal, visual, written, movement or blend	
Processing Reflection time, pace and question load	
Communication Language, directness and feedback	
Environment Sensory, privacy and technology needs	
Schedule Time zone, energy and caring/work constraints	
Adjustment Agreed practical changes	
Review What works and what to change	

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

T35

TOOL

Learning preference and access profile

Adapt coaching without stereotyping or unnecessary diagnosis.

Practical guide | Working form | Worked example

EXCEL TAB T35 Learning preference and acc

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Format Verbal, visual, written, movement or blend	Blend spoken exploration with a one-page visual decision map that M-07 can annotate during reflection.
Processing Reflection time, pace and question load	Send no surprise pre-work; allow ten silent seconds after complex questions and summarise choices before action planning.
Communication Language, directness and feedback	Use direct, concrete language; distinguish observation from inference and avoid unexplained coaching or psychometric terminology.
Environment Sensory, privacy and technology needs	Captioned video, private room, noise-cancelling headset and keyboard-accessible documents are required for reliable participation.
Schedule Time zone, energy and caring/work constraints	Early-morning sessions suit site energy patterns; avoid possession-planning weeks and provide forty-eight-hour rescheduling flexibility.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

T36

TOOL

Coaching formulation

Create a tentative, testable explanation of the development challenge.

Practical guide | Working form | Worked example

EXCEL TAB T36 Coaching formulation

TIME 45-60 minutes after discovery, plus 20-30 minutes in supervision when evidence, risk or the working hypothesis changes. | OWNER Coach

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

01 Restate the agreed goal and describe the recurring trigger-behaviour-consequence pattern with evidence.

02 Map strengths, support and other resources that could interrupt or replace the pattern.

03 Generate multiple person, relationship, role and system hypotheses about what maintains it.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

CONTINUE THE METHOD

04 Link each plausible hypothesis to a coaching experiment and note boundary or referral risks.

05 Define confirming and disconfirming evidence, then revise the formulation in supervision as learning emerges.

BOUNDARY & CAUTION

Do not treat a coaching formulation as a diagnosis or settled truth; it remains a provisional explanation to test and revise.

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.160

T36

TOOL

Coaching formulation

Create a tentative, testable explanation of the development challenge.

Practical guide | Working form | Worked example

EXCEL TAB T36 Coaching formulation

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

Goal What change is sought	
Pattern Trigger-behaviour-consequence cycle	
Resources Strengths and support	
Maintainers Beliefs, habits, relationships and systems	
Hypotheses Multiple possible explanations	
Intervention Coaching moves and experiments	
Risk Boundary/referral considerations	
Test What evidence would confirm or disconfirm	

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

T36

TOOL

Coaching formulation

Create a tentative, testable explanation of the development challenge.

Practical guide | Working form | Worked example

EXCEL TAB T36 Coaching formulation

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal What change is sought	Frame contested gate decisions early enough for genuine challenge while preserving delivery ownership and credibility.
Pattern Trigger-behaviour-consequence cycle	Sponsor requests certainty; M-07 adds detail, withholds alternatives, receives late objections and must rework the recommendation.
Resources Strengths and support	Systems expertise, calm presence, trusted engineering relationships, supportive manager and two imminent gates for practice.
Maintainers Beliefs, habits, relationships and systems	Fear of appearing unprepared, guarded commercial trust, ambiguous contingency authority and templates favouring one recommendation.
Hypotheses Multiple possible explanations	The pattern may reflect confidence, learned sponsor expectations, role ambiguity or insufficient rehearsal; evidence will test each.

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

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

X15

ACTIVITY

Leadership lifeline

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Practical guide | Working form | Worked example

EXCEL TAB X15 Leadership lifeline

TIME 60 minutes

BRING Blank timeline | Five to eight work events chosen by the coachee | Permission to omit personal or distressing experiences

RUN THE ACTIVITY

01 Invite the coachee to choose a bounded work period and mark events that changed how they lead. Events may be positive, ordinary or difficult; disclosure is optional.

02 For each event, ask what happened, what action they took, who helped and what they learned. Keep the event separate from the lesson subsequently attached to it.

03 Look for recurring patterns in decisions, relationships and responses to uncertainty. Ask for a counterexample before naming any pattern as established.

QUESTIONS TO OPEN THINKING

Which work experience still influences how you lead?

Where has that lesson helped, and where has it become too broad?

What would you need to see to revise it?

CONTINUE THE METHOD

04 Explore whether an old lesson remains useful in the current role. A rule that once protected quality may now encourage unnecessary control.

05 Choose one lesson to retain and one assumption to test. Agree a low-risk, work-based experiment rather than seeking a dramatic reinterpretation of the person's life.

06 Close by checking how the activity has affected the coachee and whether any material should not be retained. Summarise a practical implication, not a personality story.

BOUNDARY & CAUTION

This is not trauma processing. Stop or change the activity if it moves beyond the coaching remit, and use appropriate qualified support when needed.

BETWEEN SESSIONS / HAND-OFF

Notice when the old lesson appears in a current decision. Record a supporting and a contrary example before the next session.

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

BASIS H01 / H04 | Original executive application

X15 Leadership lifeline

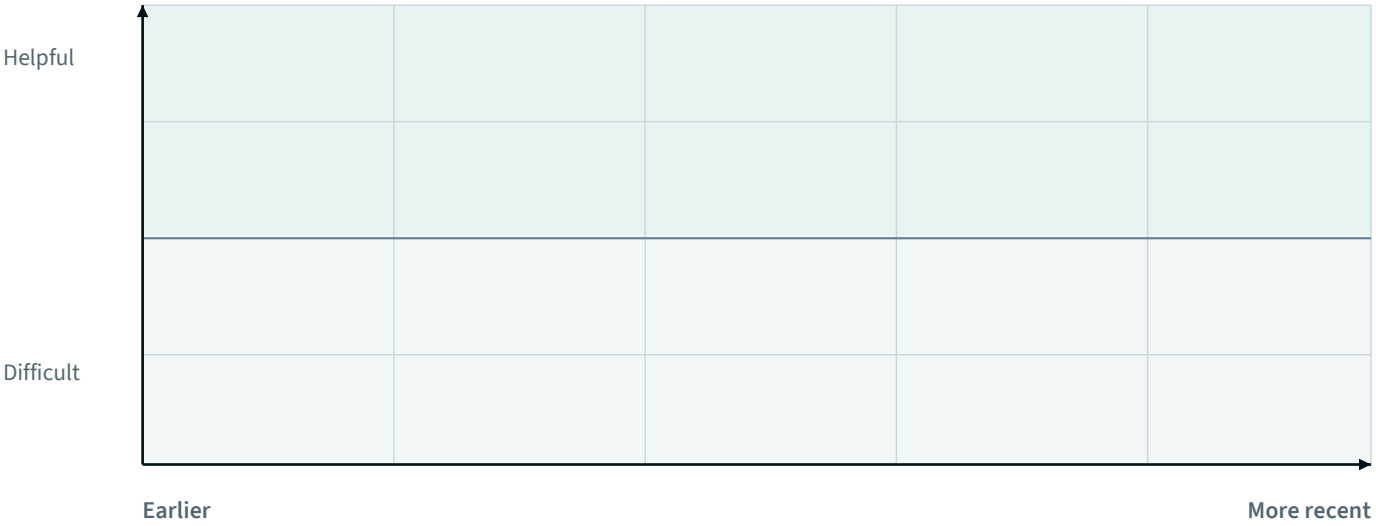
ACTIVITY

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Guide **Worksheet** Example LIVE WORKSHEET

LEADERSHIP LIFELINE PLOT

Work events that shaped my leadership



Mark selected events, connect them and label what you learned. You may omit any event.

01 Events selected

02 Action in the difficult event

03 Lesson formed

04 Counterexample

05 Revised hypothesis

06 Workplace test

Basis: H01 / H04 | Original executive application

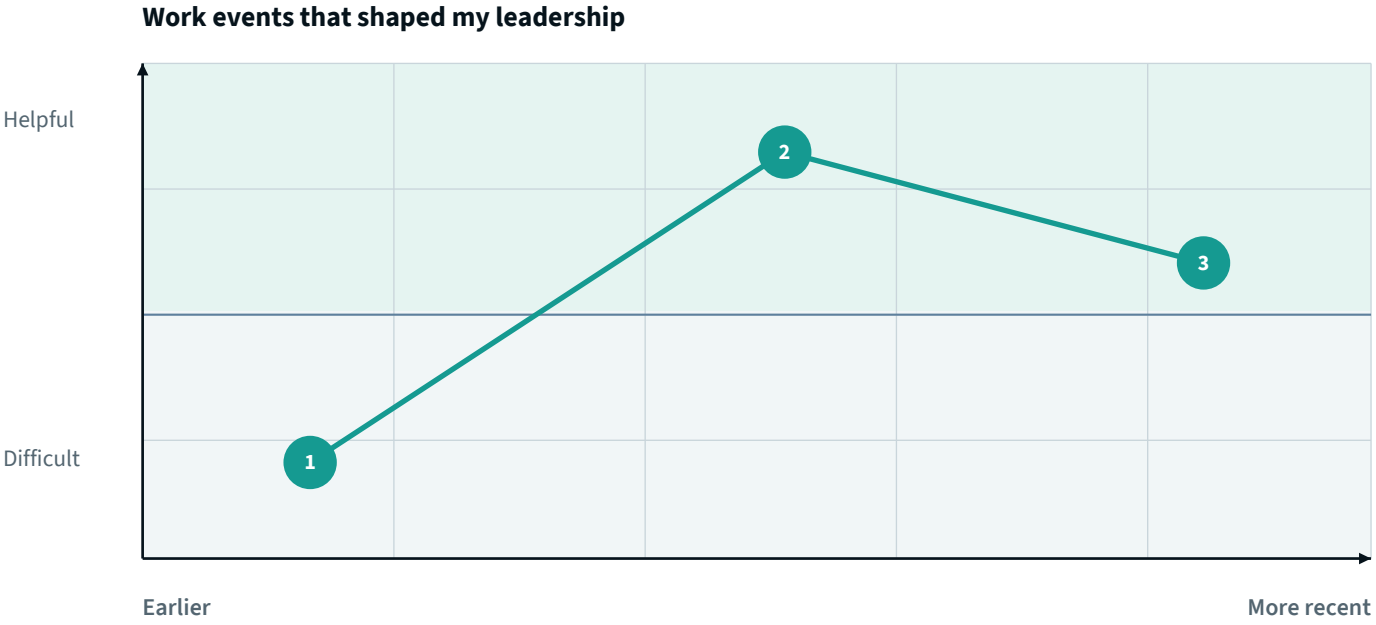
X15 Leadership lifeline

ACTIVITY

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

LEADERSHIP LIFELINE PLOT



1 Unclear handover **2 Successful joint review** **3 Move to director**

Event sequence from the source example; plotted heights are illustrative, not ratings.

01 Events selected

A failed handover, a successful joint review and the move from specialist to project director.

02 Action in the difficult event

M-07 took over a draft to prevent a missed gate after an unclear handover.

03 Lesson formed

If I do not inspect every detail, important gaps will be missed.

04 Counterexample

A later review succeeded when ownership and evidence checkpoints were agreed in advance.

05 Revised hypothesis

Clearer agreements may protect quality without requiring M-07 to inspect every detail.

06 Workplace test

Delegate one recommendation with a visible evidence checklist and review only at the agreed checkpoint.

Basis: H01 / H04 | Original executive application

X16

ACTIVITY

Best-work episode review

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

Practical guide | Working form | Worked example

EXCEL TAB X16 Bestwork episode review

TIME 45 minutes

BRING Two coachee-selected successful work episodes | Optional consented feedback from one colleague | Evidence of action and outcome

RUN THE ACTIVITY

01 Ask for a specific episode in which the coachee contributed well, not an adjective such as resilient. Establish the situation, challenge and actual action.

02 Explore what the person did, how others contributed and which conditions made it possible. Avoid crediting the executive for the entire team outcome.

03 Repeat with a second episode. Look for a recurring capability while preserving differences in context and evidence.

CONTINUE THE METHOD

04 Ask where the same capability may be underused or overused. A strength is not universally helpful at maximum intensity.

05 Choose a current task where a deliberate application could help. Define a behaviour, necessary support and one risk to monitor.

06 Capture a short strengths hypothesis and an experiment. Identify what further feedback would confirm, refine or contradict it.

QUESTIONS TO OPEN THINKING

What did you actually do that made a difference?

What did the context and other people contribute?

Where could the same strength be too much?

BOUNDARY & CAUTION

This is an original episode-review exercise. It is not the licensed Reflected Best Self Exercise and does not reproduce its materials or scoring.

BETWEEN SESSIONS / HAND-OFF

Ask one colleague for a concrete example of your useful contribution, with permission to discuss it in coaching.

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

BASIS H01 / R22 | Original executive application

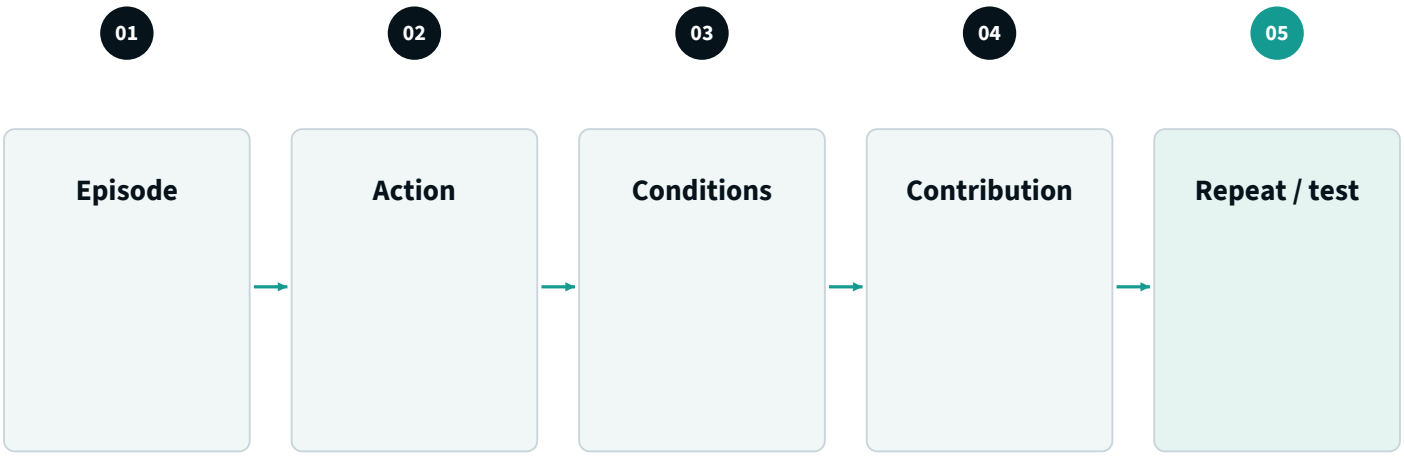
X16 Best-work episode review

ACTIVITY

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

Guide **Worksheet** Example LIVE WORKSHEET

BEST-WORK RECONSTRUCTION



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

01 Episode one

02 Episode two

03 Strength hypothesis

04 Enabling conditions

05 Overuse risk

06 Application

Basis: H01 / R22 | Original executive application

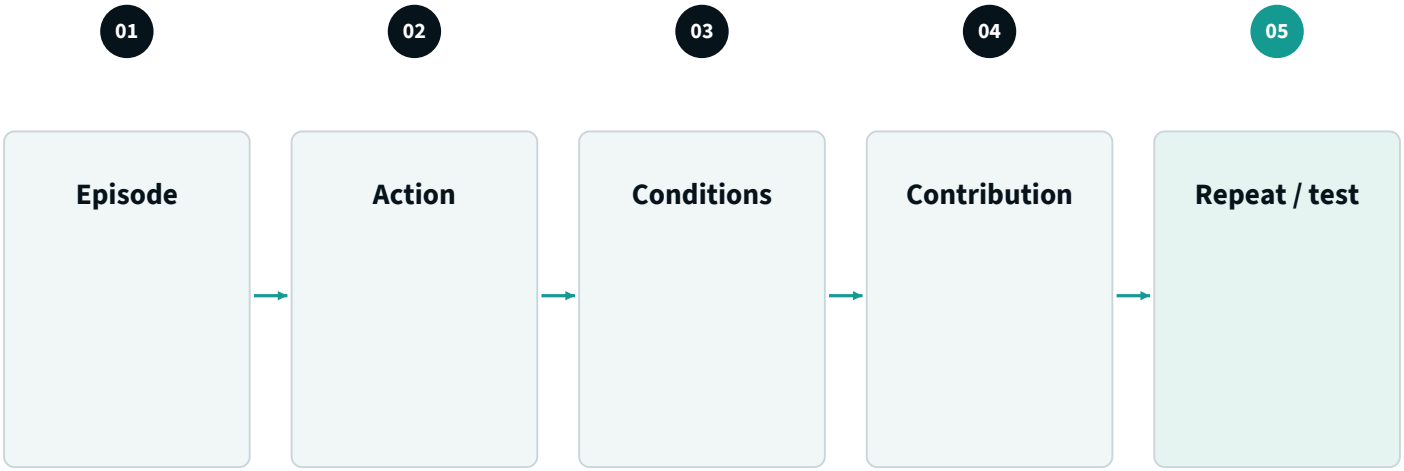
X16 Best-work episode review

ACTIVITY

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

Guide | Worksheet | **Example** | FICTIONAL WORKED EXAMPLE

BEST-WORK RECONSTRUCTION



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

01 Episode one

M-07 reframed a gate dispute as two decisions with different evidence needs.

02 Episode two

A cross-functional handover improved after M-07 asked each owner to name the condition for acceptance.

03 Strength hypothesis

Making complex decisions explicit and connecting perspectives.

04 Enabling conditions

Prepared evidence, time for challenge and specialists with clear authority.

05 Overuse risk

Over-structuring a simple decision can slow the team and crowd out its own problem-solving.

06 Application

Use a concise decision frame at the next complex gate, but let the team handle a routine handover with its existing process.

Basis: H01 / R22 | Original executive application

X17

ACTIVITY

Strengths dosage: underuse and overuse

Explore how the same strength can help or hinder depending on intensity, timing and context.

Practical guide | Working form | Worked example

EXCEL TAB X17 Strengths dosage underuse a

TIME 40 minutes

BRING An authorised strengths report if relevant, or episode-based strengths hypotheses | Two contrasting examples | A current task

RUN THE ACTIVITY

01 Select one strength the coachee recognises and define it behaviourally. A report label can start the discussion but cannot establish how others experience it.

02 Place three descriptions on a line: too little for this situation, useful range, and too much. Write observable signs rather than numerical personality ratings.

03 Reconstruct an episode at each end of the line. Ask what the person intended, what others experienced and what else may explain the result.

CONTINUE THE METHOD

04 Identify the cue that signals a need to change dosage, such as uncertainty, time pressure, task novelty or a colleague's request.

05 Choose a complementary behaviour rather than suppressing the strength. For analytical rigour, this might be asking what evidence is sufficient for the decision.

06 Plan one application and one feedback question. Review whether the adjustment helped the task and the relationship, not whether the profile became balanced.

QUESTIONS TO OPEN THINKING

When is this strength exactly what the work needs?

What would a colleague notice when it becomes too much?

What cue could help you adjust earlier?

BOUNDARY & CAUTION

Do not infer capability, character or risk from a relative preference score. Retain authorised assessment interpretation and avoid forced numerical balance.

BETWEEN SESSIONS / HAND-OFF

Record three uses of the strength this week and what the context required in each.

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

BASIS H01 / H05 / R04 | Original executive application

X17 Strengths dosage: underuse and overuse

ACTIVITY

Explore how the same strength can help or hinder depending on intensity, timing and context.

Guide **Worksheet** Example LIVE WORKSHEET

01 Strength

02 Underuse

03 Useful range

04 Overuse

Amount used in this situation

05 Adjustment cue

06 Experiment and feedback

Basis: H01 / H05 / R04 | Original executive application

X17 Strengths dosage: underuse and overuse

ACTIVITY

Explore how the same strength can help or hinder depending on intensity, timing and context.

01 Strength

Analytical rigour, treated as a hypothesis from episodes and the coachee's report.

02 Underuse

Accepting a recommendation without asking about a material evidence gap.

03 Useful range

Clarifying the decision, testing the critical assumptions and identifying sufficient evidence.

04 Overuse

Reopening settled minor details after the accountable specialist has addressed the main risk.

Amount used in this situation

05 Adjustment cue

Ask whether the remaining uncertainty could change the decision or breach a required standard.

06 Experiment and feedback

At one gate, limit challenge to decision-relevant gaps; ask the engineering lead whether rigour remained useful and proportionate.

Basis: H01 / H05 / R04 | Original executive application

X18

ACTIVITY

Values trade-off cards

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Practical guide | Working form | Worked example

EXCEL TAB X18 Values tradeoff cards

TIME 45 minutes

BRING A genuine, bounded work dilemma | Six blank cards | Known legal, ethical and operational constraints

RUN THE ACTIVITY

01 Ask the coachee to write their own value words on cards, using recent work examples to explain each. Suggested words are invitations, not a prescribed set.

02 Select two or three values that pull in different directions in the current dilemma. Describe the competing claims without assuming one is more mature.

03 For each option, ask whose interests it protects, whose burden it increases and what constraint cannot be traded away.

QUESTIONS TO OPEN THINKING

What does each value protect here?

Whose cost is least visible?

What must not be traded away?

CONTINUE THE METHOD

04 Generate a third option that preserves more of both values, where feasible. Do not use creative compromise to bypass a mandatory safety or ethical requirement.

05 Choose an option or identify the further evidence and authority needed. Record the trade-off honestly, including what the decision does not resolve.

06 Rehearse how the coachee will explain the reasoning to affected people and invite challenge. Set a date to review consequences.

BOUNDARY & CAUTION

This is a reflective conversation, not a standardised values assessment. Do not rank people or infer their beliefs from group identity.

BETWEEN SESSIONS / HAND-OFF

Explain the trade-off to one relevant colleague and record what their perspective adds.

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

BASIS H01 / R21 | Original executive application

X18 Values trade-off cards

ACTIVITY

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Guide **Worksheet** Example LIVE WORKSHEET

VALUES TRADE-OFF CARDS

01

Value / meaning

02

Behaviour it asks for

03

What it protects

04

What it can cost

05

Another value in tension

06

Choice under pressure

Cut or copy the cards; name values in the coachee's words and explore the real trade-off.

01 Dilemma

02 Values in tension

03 Non-negotiable boundary

04 Options considered

05 Choice and reason

06 Review

Basis: H01 / R21 | Original executive application

X18 Values trade-off cards

ACTIVITY

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

VALUES TRADE-OFF CARDS

01	02	03
Value / meaning Stewardship	**Behaviour it asks for**	**What it protects**
04	**05**	**06**
What it can cost	**Another value in tension** Transparency	**Choice under pressure**

Cut or copy the cards; name values in the coachee's words and explore the real trade-off.

01 Dilemma

Whether to move ahead with a gate when one non-critical evidence item is incomplete.

02 Values in tension

Stewardship of delivery time and transparency about uncertainty.

03 Non-negotiable boundary

Mandatory technical assurance must be complete; no value card can override it.

04 Options considered

Delay everything; approve without comment; approve a bounded step with a named condition.

05 Choice and reason

Recommend the bounded step only after the technical authority confirms it is permissible, with the missing item and due date recorded.

06 Review

Check whether the condition was closed and whether the team understood the limit of the decision.

Basis: H01 / R21 | Original executive application

X19

ACTIVITY

Energy and attention diary

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Practical guide | Working form | Worked example

EXCEL TAB X19 Energy and attention diary

TIME 20 minutes setup; five days of brief entries; 30-minute review

BRING A normal working week | Three optional daily check-in points | A private record without unnecessary personal details

RUN THE ACTIVITY

01 Agree the observation window and define what attention and energy mean to the coachee. Use simple personal labels such as low, workable and high, not clinical cut-offs.

02 Record the activity, context, interruptions and an optional energy description at a few planned times. Avoid constant monitoring or a burdensome minute-by-minute log.

03 At review, look for repeated associations between tasks, timing, environment and attention. Do not assume that a coincident pattern proves a cause.

QUESTIONS TO OPEN THINKING

When is your attention most usable for important work?

What is the work system asking of you at those times?

What small change can be tested without moving the burden to someone else?

CONTINUE THE METHOD

04 Separate avoidable work design problems from personal habits. Discuss meeting load, decision demands, travel, access needs and available recovery time.

05 Choose one modest change, such as protecting a planning interval or combining low-value administrative work. Obtain permission where changes affect others.

06 Compare the next week using the same simple observations and decide what to retain. Significant or persistent health concerns belong with qualified support.

BOUNDARY & CAUTION

No burnout, medical or mental-health score is produced. Participation in energy reflection is optional; persistent symptoms or significant distress require appropriate support.

BETWEEN SESSIONS / HAND-OFF

Keep the agreed brief diary, then identify one change in work design rather than a long list of self-improvement tasks.

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

BASIS H01 | Original executive application

X19 Energy and attention diary

ACTIVITY

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Guide **Worksheet** Example LIVE WORKSHEET

FIVE-DAY ATTENTION GRID

FIVE-DAY OBSERVATION GRID

	Day 1	Day 2	Day 3	Day 4	Day 5
First entry					
Middle entry					
Last entry					

L low W workable H high N/O not observed

Personal descriptions, not health thresholds. The source example supplies no daily ratings.

01 Observation window

02 Pattern noticed

03 Context

04 Alternative explanations

05 Experiment

06 Review evidence

Basis: H01 | Original executive application

X19 Energy and attention diary

ACTIVITY

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

FIVE-DAY ATTENTION GRID

FIVE-DAY OBSERVATION GRID

	Day 1	Day 2	Day 3	Day 4	Day 5
First entry					
Middle entry					
Last entry					

L low W workable H high N/O not observed

Personal descriptions, not health thresholds. The source example supplies no daily ratings.

01 Observation window

Five normal working days, three brief entries per day.

02 Pattern noticed

M-07's planning work repeatedly moved to the end of days containing six consecutive meetings.

03 Context

Unplanned updates arrived during the only intended preparation interval.

04 Alternative explanations

Travel and a particularly demanding project week may also explain the pattern.

05 Experiment

Protect two 30-minute preparation blocks and agree a separate urgent-update route.

06 Review evidence

Compare whether the briefs were prepared earlier and whether the arrangement created delays for colleagues.

Basis: H01 | Original executive application

X20

ACTIVITY

Calendar versus contribution audit

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

Practical guide | Working form | Worked example

EXCEL TAB X20 Calendar versus contributio

TIME 45 minutes review plus 20 minutes preparation

BRING A recent calendar with sensitive details removed | Role mandate | An agreed set of work categories

RUN THE ACTIVITY

01 Agree a representative period and mark atypical events. Use only the detail required to understand work allocation, not private appointment content.

02 Create four to six role-relevant categories, such as strategic decisions, people development, stakeholder coordination and administration. Categories must be mutually clear enough for a useful discussion.

03 Estimate time in each category and identify unrecorded work. State whether figures are calendar bookings, actual time or estimates; do not present them as interchangeable.

QUESTIONS TO OPEN THINKING

What important contribution keeps being displaced?

Which meeting needs your authority, and which only needs a clear answer?

Who would carry the cost of your proposed change?

CONTINUE THE METHOD

04 Compare the pattern with the role mandate and current phase of work. There is no universal ideal percentage for executive time.

05 Select one activity to stop, delegate, shorten or redesign, and one contribution to protect. Explore who would inherit any displaced work and what support they need.

06 Agree a two-week trial and review both contribution and unintended burden. Use the diary as evidence for a conversation, not as a surveillance tool.

BOUNDARY & CAUTION

Do not impose a supposedly optimal time allocation or use private calendar data beyond the agreed purpose.

BETWEEN SESSIONS / HAND-OFF

Run the agreed calendar experiment and bring one example of a protected contribution and one unintended consequence.

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

BASIS H01 / H04 | Original executive application

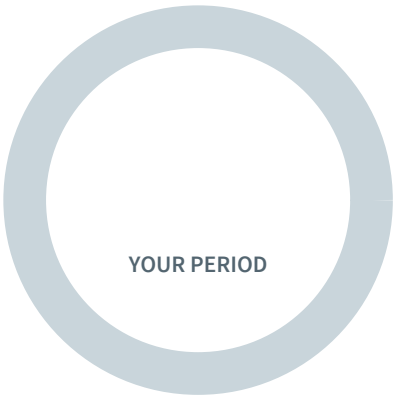
X20 Calendar versus contribution audit

ACTIVITY

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

Guide Worksheet Example LIVE WORKSHEET

BOOKED / ACTUAL BARS AND RING



BOOKED VS USED

Record hours on the same basis; plot against a common scale.

Booked hours

Used as intended

Complete the paired bars or ring only when both quantities and the denominator are known.

01 Period and basis

02 Categories

03 Finding

04 Context

05 Adjustment

06 Review

Basis: H01 / H04 | Original executive application

X20 Calendar versus contribution audit

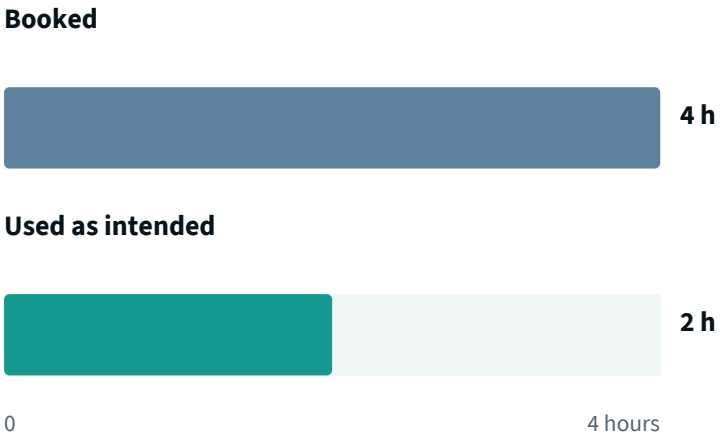
ACTIVITY

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

BOOKED / ACTUAL BARS AND RING



PREPARATION HOURS / TWO WEEKS



Retained fictional example: 2 of 4 booked preparation hours used as intended. Not a productivity norm.

01 Period and basis

Two weeks of booked calendar time, checked against M-07's recollection of unplanned work.

02 Categories

Decision preparation, meetings, people development, stakeholder work and administration.

03 Finding

Preparation was booked for four hours but only two hours were used as intended.

04 Context

Late evidence and unclear update channels caused repeated interruptions.

05 Adjustment

Delegate routine status collection and protect two preparation blocks with an urgent-exception route.

06 Review

Check actual preparation time, brief quality and the coordinator's workload after two weeks.

Basis: H01 / H04 | Original executive application

X21

ACTIVITY

Critical decision reconstruction

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

Practical guide | Working form | Worked example

EXCEL TAB X21 Critical decision reconstru

TIME 55 minutes

BRING One completed decision suitable for confidential discussion | Authorised decision records | A timeline rather than hindsight alone

RUN THE ACTIVITY

01 Choose a decision with a clear beginning and end. Establish what was known at the time, not only what became obvious afterwards.

02 Reconstruct the sequence: trigger, information available, alternatives, stakeholders consulted and decision authority. Mark gaps in memory or records.

03 Ask where an assumption entered the reasoning and what competing explanation was considered. Avoid equating an unfavourable outcome with a bad process.

CONTINUE THE METHOD

04 Explore pressure, incentives and relationships that shaped the choice. Identify what the executive could influence and what required wider action.

05 Identify one process strength and one change that would improve the next comparable decision. Keep the improvement proportionate to risk and time.

06 Create a prospective decision prompt and a review plan. Do not rehearse an actual protected assessment item or retroactively rewrite the original record.

QUESTIONS TO OPEN THINKING

What did you know then, rather than now?

Which alternative did you dismiss, and on what evidence?

What would you repeat even though the outcome was disappointing?

BOUNDARY & CAUTION

Do not infer stable judgement ability from one episode. Respect legal privilege, investigations and restrictions on confidential business information.

BETWEEN SESSIONS / HAND-OFF

Use the prospective prompt on a new decision and retain the prediction before the outcome is known.

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

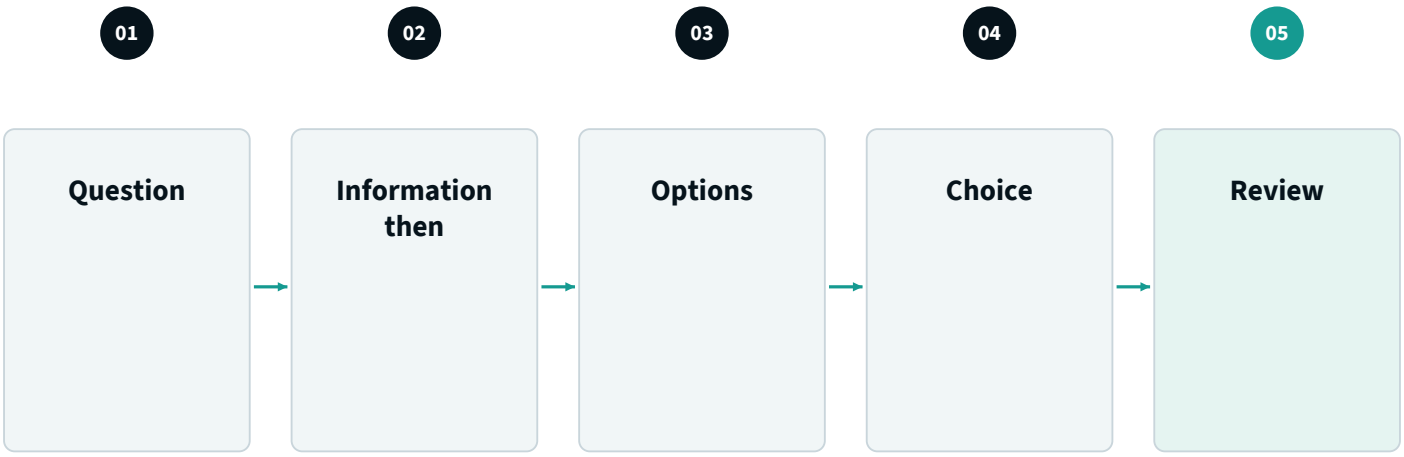
BASIS H01 / H04 | Original executive application

X21 Critical decision reconstruction

ACTIVITY

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

DECISION RECONSTRUCTION TIMELINE



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

01 Decision

02 Known information

03 Assumption

04 Pressure and context

05 Learning

06 Next-decision prompt

Basis: H01 / H04 | Original executive application

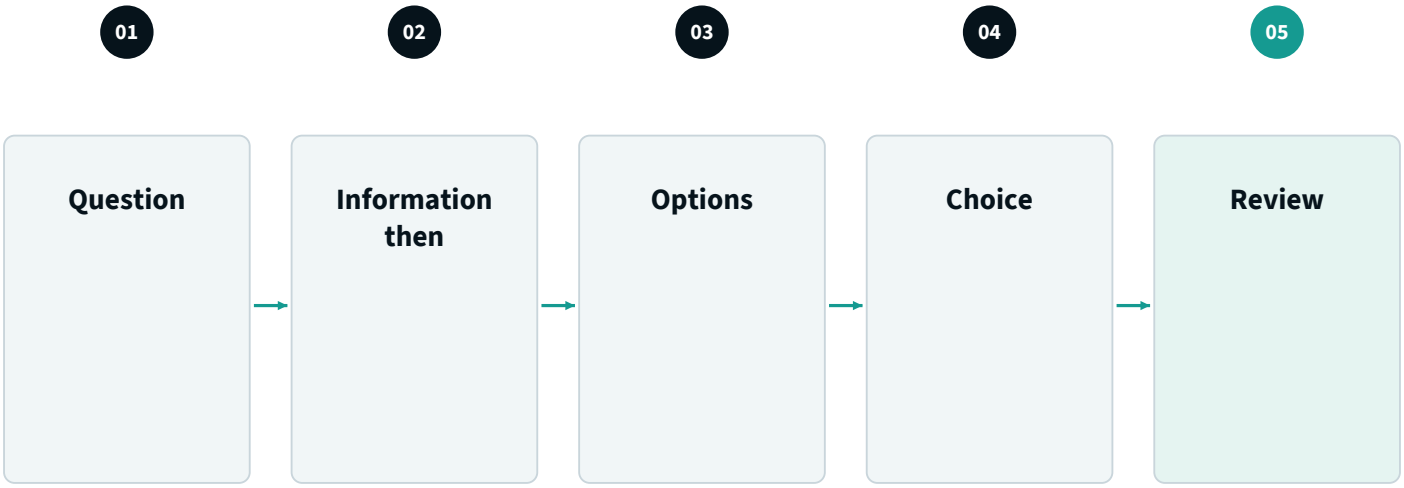
X21 Critical decision reconstruction

ACTIVITY

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

DECISION RECONSTRUCTION TIMELINE



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

01 Decision

M-07 recommended a conditional gate approval with incomplete supplier evidence.

02 Known information

Technical assurance was complete; supplier confirmation was expected but not yet received.

03 Assumption

The supplier would respond within the agreed week, based on one verbal indication.

04 Pressure and context

A delivery milestone was approaching and the escalation owner was unclear.

05 Learning

The conditional decision was legitimate, but the supplier assumption needed an explicit owner and contingency.

06 Next-decision prompt

What critical assumption remains, who owns its test, and what changes if it is wrong?

Basis: H01 / H04 | Original executive application

X22

ACTIVITY

Stakeholder perception interviews

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

Practical guide | Working form | Worked example

EXCEL TAB X22 Stakeholder perception inte

TIME 60 minutes setup/debrief; 15 minutes per interview

BRING Agreed focus and consent wording | Balanced contributor selection | A clear reporting rule and secure note process

RUN THE ACTIVITY

01 Agree one behavioural question and the audience for the findings. Decide whether feedback is named or genuinely group-protected; do not promise anonymity that cannot be delivered.

02 Invite contributors without pressure. State the purpose, optional participation, how notes will be used and the route for concerns outside coaching.

03 Use the script: when have you seen the behaviour; what exactly happened; what impact followed; what would a useful alternative look like; what context should we understand?

CONTINUE THE METHOD

04 Ask for examples that support and contradict the initial concern. Do not solicit speculation about motives or collect allegations for informal handling.

05 Summarise each interview back, confirm permitted use and remove unnecessary identifying detail. Keep roles separate where their observation opportunities differ.

06 Debrief with the coachee using themes, exceptions and uncertainty. Choose a small practice and an appropriate follow-up question, not a verdict about the person.

QUESTIONS TO OPEN THINKING

What did you directly observe?

When has the opposite happened?

What would you like to experience differently in that same situation?

BOUNDARY & CAUTION

A coaching interview is not an investigation or a validated 360 instrument. Use formal routes for misconduct and qualified administration for standardised tests.

BETWEEN SESSIONS / HAND-OFF

Review the permitted summary, mark what fits and what needs context, then choose one observable practice to test.

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

BASIS H01 / H05 / R04 | Original executive application

X22 Stakeholder perception interviews

ACTIVITY

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

Guide **Worksheet** Example LIVE WORKSHEET

PERCEPTION EVIDENCE INTERVIEW

01 **Ask for observations**

02 **Retain different views**

03 **Check a hypothesis**

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 **Focus**

02 **Contributor plan**

03 **Questions**

04 **Evidence**

05 **Context**

06 **Action and follow-up**

Basis: H01 / H05 / R04 | Original executive application

X22 Stakeholder perception interviews

ACTIVITY

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

PERCEPTION EVIDENCE INTERVIEW

01 **Ask for observations**

02 **Retain different views**

03 **Check a hypothesis**

What mattered? → What happened? → What else explains it?

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 Focus

Does M-07 leave enough space for challenge before stating a recommendation?

02 Contributor plan

Three peers and a manager, with explicit named-summary consent; no false anonymity promise.

03 Questions

Ask for one recent episode, its impact, a counterexample and a useful alternative.

04 Evidence

Two peers describe early closure; one recalls a meeting where challenge was actively invited.

05 Context

The successful meeting had a clear question and evidence circulated in advance.

06 Action and follow-up

Trial a concerns-first opening and ask whether it changed the opportunity to contribute, without demanding favourable feedback.

Basis: H01 / H05 / R04 | Original executive application

X23

ACTIVITY

Leadership 360 debrief

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

Practical guide | Working form | Worked example

EXCEL TAB X23 Leadership 360 debrief

TIME 75 minutes; optional second session

BRING Authorised report and practitioner manual | Confirmed rater-group privacy rules | Coachee's consent, current goal and readiness to discuss feedback

RUN THE ACTIVITY

01 Explain the report's purpose, scales, comparison groups and limitations before examining results. Confirm that no one will try to identify anonymous respondents and that self and manager perspectives remain distinct.

02 Ask the coachee what they notice first and how they want to work with it. Allow a pause; do not insist on immediate acceptance or explain emotion through a personality label.

03 Identify a supported strength, a difference between perspectives and an area with limited evidence. Read group sizes, missing data and observation opportunities before interpreting score gaps.

QUESTIONS TO OPEN THINKING

What is recognisable, surprising or unclear?

What might these groups see that others do not?

What one change would colleagues be able to notice?

CONTINUE THE METHOD

04 Explore concrete episodes that could explain the pattern, including counterexamples and system constraints. Distinguish intention, preference and experienced impact rather than declaring one view the truth.

05 Select one behaviour relevant to the agreed goal. Rehearse it and agree a real opportunity, an ethical feedback request and a reasonable review interval.

06 Summarise what the report supports and does not establish. Agree which action, if any, the coachee will share with stakeholders; retain raw results only within the authorised protocol.

BOUNDARY & CAUTION

Do not reverse-engineer raters, average unlike scales, treat a small group as representative or repeat the full instrument simply to manufacture improvement.

BETWEEN SESSIONS / HAND-OFF

Write a short, non-defensive statement of the practice you will try and the specific feedback you will request.

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

BASIS H01 / H05 / R04 / R05 | Original executive application

X23 Leadership 360 debrief

ACTIVITY

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

Guide **Worksheet** Example LIVE WORKSHEET

01 Report boundary

02 Initial response

03 Evidence pattern

04 Context and counterexample

05 Experiment

06 Follow-up and sharing

Basis: H01 / H05 / R04 / R05 | Original executive application

X23 Leadership 360 debrief

ACTIVITY

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

01 Report boundary

Authorised Leadership 360 Feedback; self and manager separate, peer and direct-report groups protected according to the manual.

02 Initial response

M-07 recognises strong decision ownership but is surprised by comments about limited challenge.

03 Evidence pattern

Some colleagues experience the recommendation as settled before discussion; observation opportunities differ.

04 Context and counterexample

A recent concerns-first meeting was experienced differently, suggesting the sequence may matter.

05 Experiment

At two reviews, ask for risks and alternatives before stating a preference, then summarise what changed in the recommendation.

06 Follow-up and sharing

M-07 shares the practice, not rater identities or raw group data, and requests specific feedback after two meetings.

Basis: H01 / H05 / R04 / R05 | Original executive application

X24

ACTIVITY

Assessment-to-experiment bridge

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

Practical guide | Working form | Worked example

EXCEL TAB X24 Assessmenttoexperiment brid

TIME 50 minutes

BRING An authorised assessment report | A clear coaching question | One comparable work episode

RUN THE ACTIVITY

01 State the question the assessment was selected to explore. Ask whether the report actually addresses that question and whether its language, population and purpose are appropriate.

02 Identify the evidence type: preference, judgement, reasoning, observed behaviour or simulation performance. Keep the type visible in the working record.

03 Choose one finding and ask the coachee for an example, a counterexample and any contextual explanation. A low relative preference is not a lack of ability.

QUESTIONS TO OPEN THINKING

What kind of evidence is this result?

Where does it fit your experience, and where does it not?

What would a useful experiment tell us that the report cannot?

CONTINUE THE METHOD

04 Write a conditional hypothesis: in this situation, this practice may help because of this reasoning. Do not infer hidden traits or future performance beyond the evidence.

05 Design a small workplace experiment with a clear behaviour, boundary, support and feedback source. Avoid practising live protected assessment items.

06 Review the report-to-action chain and agree when to revisit it. The next evidence should usually come from work, not automatically from another test.

BOUNDARY & CAUTION

Use qualified interpretation and authorised reports. No new score, benchmark or test item is created by this bridge.

BETWEEN SESSIONS / HAND-OFF

Complete one assessment-to-action record and check it with your practitioner before making a consequential inference.

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

BASIS H01 / H05 / R04 / R05 | Original executive application

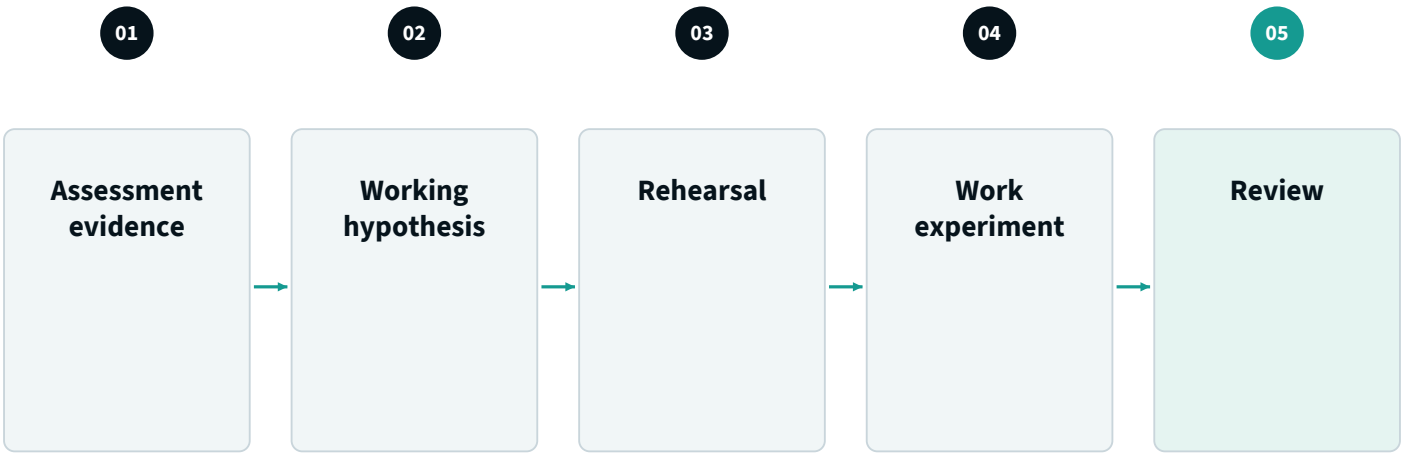
X24 Assessment-to-experiment bridge

ACTIVITY

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

Guide **Worksheet** Example LIVE WORKSHEET

EVIDENCE-TO-EXPERIMENT BRIDGE



A report becomes useful when it changes the next question or the next workplace experiment.

01 Question and tool

02 Evidence type

03 Finding and qualification

04 Work hypothesis

05 Experiment

06 Review evidence

Basis: H01 / H05 / R04 / R05 | Original executive application

X24 Assessment-to-experiment bridge

ACTIVITY

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

EVIDENCE-TO-EXPERIMENT BRIDGE



A report becomes useful when it changes the next question or the next workplace experiment.

01 Question and tool

Use Leadership Preference Profile to explore where M-07 naturally directs attention.

02 Evidence type

Relative leadership preference across the published contribution landscape, not absolute competence.

03 Finding and qualification

Development receives less emphasis than Direction; this does not prove poor people leadership.

04 Work hypothesis

A deliberate delegation checkpoint may increase attention to developing another person's judgement.

05 Experiment

Ask the specialist to explain options and rationale before M-07 offers a solution.

06 Review evidence

Observe whether the specialist retained ownership and whether the decision met the required standard; do not seek an artificially balanced profile.

Basis: H01 / H05 / R04 / R05 | Original executive application

X25

ACTIVITY

Relationship system map

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

Practical guide | Working form | Worked example

EXCEL TAB X25 Relationship system map

TIME 50 minutes

BRING One leadership challenge | A blank map | Roles instead of personal names where possible

RUN THE ACTIVITY

01 Place the coachee's role in the centre and add the roles that affect the chosen work. Map actual relationships, not everyone in the organisation chart.

02 Draw the important flows: information, decisions, resources, challenge and support. Use different line labels, not colour alone, to distinguish them.

03 For each critical connection, ask what is expected, what is currently exchanged and where the evidence is uncertain. Do not infer motives from a missing response.

QUESTIONS TO OPEN THINKING

Where does the work get stuck between roles?

How might your response reinforce the pattern?

What could you and the other role test together?

CONTINUE THE METHOD

04 Identify reciprocal patterns, such as late evidence leading to takeover, which reduces ownership and creates more late evidence. Mark this as a hypothesis to test.

05 Choose the smallest relationship or process change that could interrupt the pattern. Agree how the other person will be involved rather than treating them as an object of intervention.

06 Plan a conversation, observation or experiment and define what would change your interpretation. Review the whole system before assigning a personal deficit.

BOUNDARY & CAUTION

Maps are hypotheses, not proof of influence or hidden motives. Avoid intrusive personal-network data or politically manipulative use.

BETWEEN SESSIONS / HAND-OFF

Discuss one mapped dependency with the relevant colleague and invite them to correct the map.

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

BASIS H01 / H04 | Original executive application

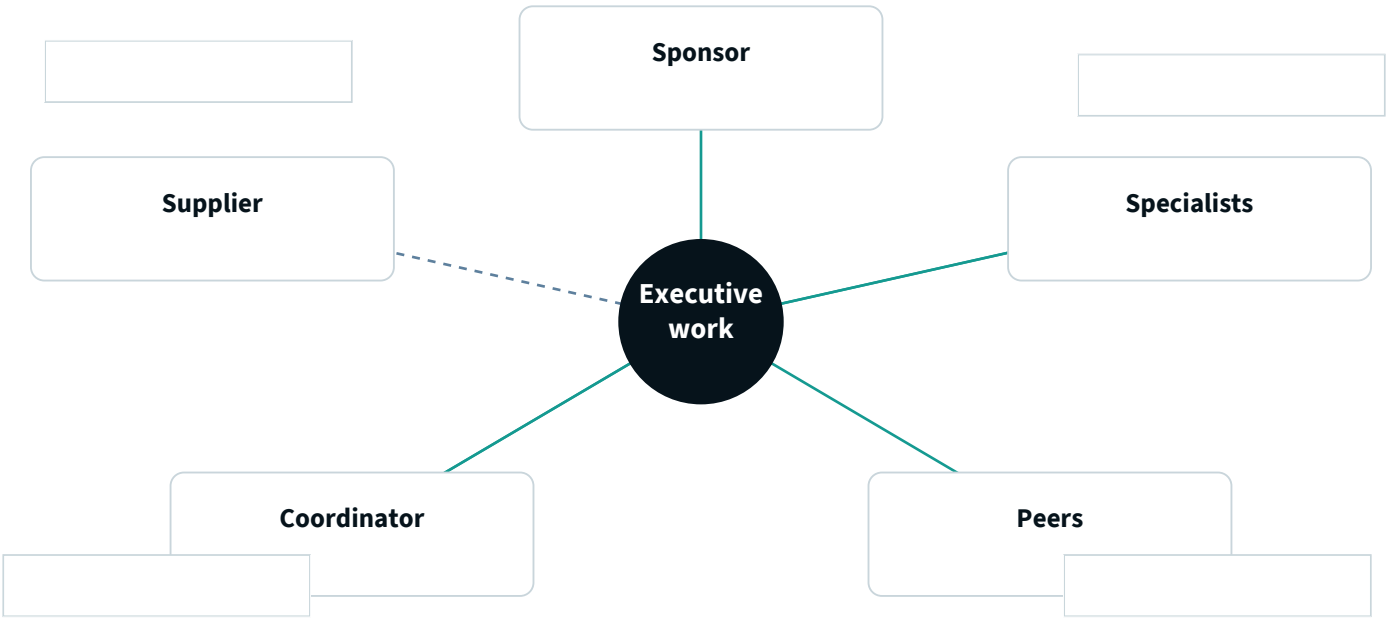
X25 Relationship system map

ACTIVITY

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

Guide **Worksheet** Example LIVE WORKSHEET

RELATIONSHIP-SYSTEM MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Challenge

02 Roles and flows

03 Observed pattern

04 Uncertainty

05 Small system change

06 Learning question

Basis: H01 / H04 | Original executive application

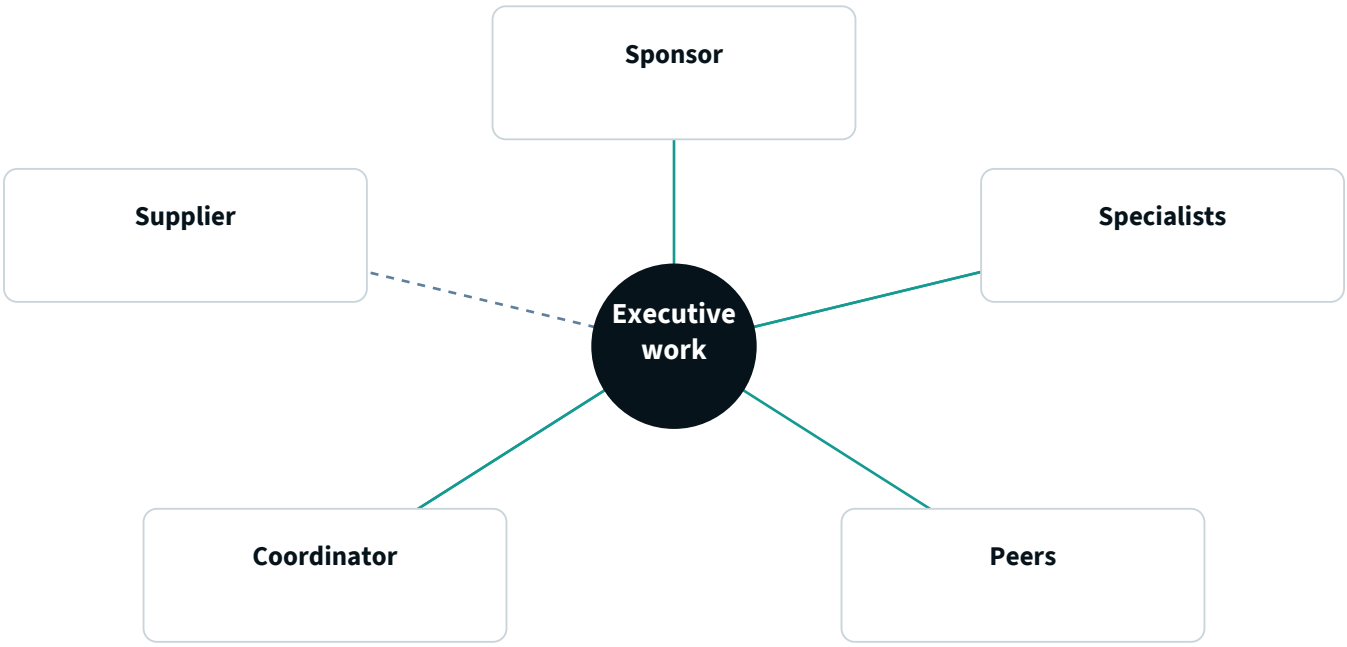
X25 Relationship system map

ACTIVITY

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

RELATIONSHIP-SYSTEM MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Challenge

Repeated late changes to gate recommendations.

02 Roles and flows

Engineering provides assurance; commercial supplies cost options; M-07 integrates; sponsor approves material trade-offs.

03 Observed pattern

Late evidence prompts M-07 to rewrite; specialists then wait for M-07's preferred version.

04 Uncertainty

It is unclear whether delays reflect missing data, unclear ownership or the expectation of takeover.

05 Small system change

Agree evidence checkpoints and let the specialist state the recommendation before integration.

06 Learning question

Does clearer ownership reduce waiting, or does a supplier dependency still require separate action?

Basis: H01 / H04 | Original executive application

X26

ACTIVITY

Delegation bottleneck review

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

Practical guide | Working form | Worked example

EXCEL TAB X26 Delegation bottleneck revie

TIME 45 minutes

BRING Two tasks the executive recently took back | Delegation agreements if available | Operational safety and approval boundaries

RUN THE ACTIVITY

01 Choose a specific task, not a general complaint that the team lacks ownership. Record the intended outcome and why it was delegated.

02 Reconstruct the agreement: authority, quality criteria, resources, information, deadline, checkpoint and escalation. Mark what was never explicitly agreed.

03 Ask what happened before the executive intervened. Separate evidence of risk from assumptions about competence or commitment.

QUESTIONS TO OPEN THINKING

What did the colleague actually have authority to decide?

What was missing from the agreement?

When would taking back the task be justified?

CONTINUE THE METHOD

04 Explore task-specific capability and available capacity with respect. The appropriate response may include instruction, resources or a management decision rather than more coaching.

05 Design a better agreement for a comparable task and define when intervention is necessary. Delegation never removes the executive's formal accountability.

06 Choose a bounded trial and a feedback conversation with the colleague. Review ownership, quality and burden rather than merely counting tasks delegated.

BOUNDARY & CAUTION

Do not use delegation experiments for work requiring unprovided qualifications, unsafe independence or authority the colleague does not have.

BETWEEN SESSIONS / HAND-OFF

Ask the colleague what would make the next delegation clearer, then agree the trial jointly.

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

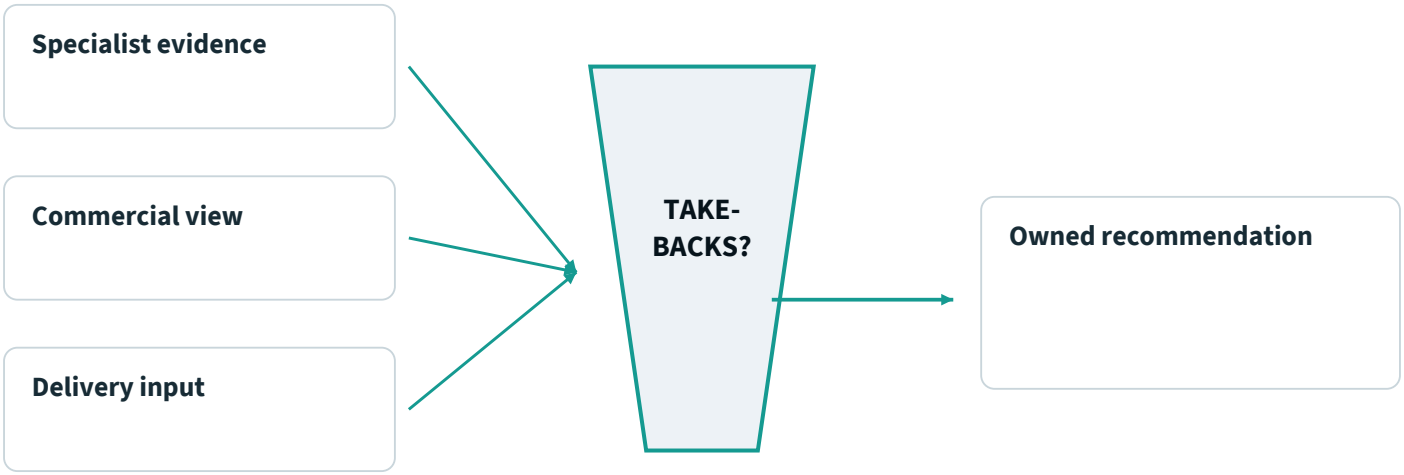
BASIS H01 / H05 | Original executive application

X26 Delegation bottleneck review

ACTIVITY

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

DELEGATION BOTTLENECK FLOW



Clarify authority, evidence standard, checkpoint and escalation.

Map the actual task and handovers. A bottleneck is a question about the work, not a personality label.

01 Task

02 Original gap

03 Take-back trigger

04 Diagnosis hypothesis

05 Revised agreement

06 Trial evidence

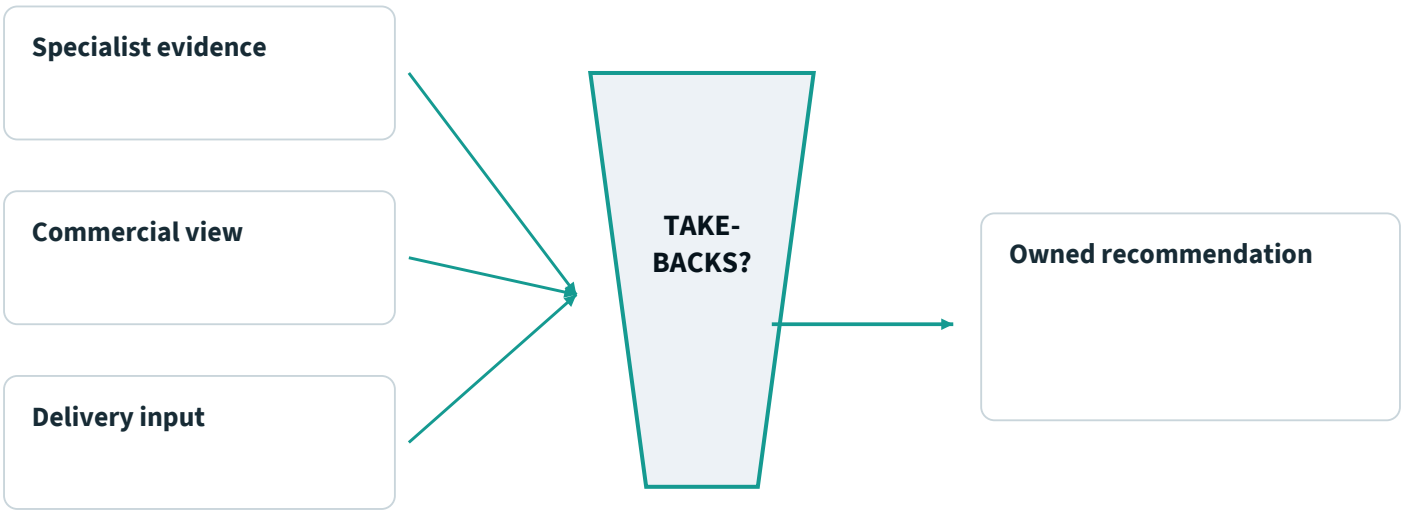
Basis: H01 / H05 | Original executive application

X26 Delegation bottleneck review

ACTIVITY

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

DELEGATION BOTTLENECK FLOW



Clarify authority, evidence standard, checkpoint and escalation.

Map the actual task and handovers. A bottleneck is a question about the work, not a personality label.

01 Task

Prepare the integrated evidence summary for a gate review.

02 Original gap

The specialist owned the draft but the acceptable evidence threshold and escalation time were unclear.

03 Take-back trigger

A late supplier update caused M-07 to assume the recommendation was unreliable.

04 Diagnosis hypothesis

An unclear checkpoint and information dependency may explain the issue more than a capability deficit.

05 Revised agreement

Specialist owns options and recommendation; M-07 reviews decision-relevant gaps at the agreed checkpoint; technical sign-off stays with engineering.

06 Trial evidence

Compare one delegated draft with the agreement and ask the specialist whether authority and support were clear.

Basis: H01 / H05 | Original executive application

X27

ACTIVITY

Assumptions and contrary evidence

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

Practical guide | Working form | Worked example

EXCEL TAB X27 Assumptions and contrary ev

TIME 45 minutes

BRING One recent work episode | Available records | A willingness to test the coachee's and coach's interpretations

RUN THE ACTIVITY

01 Ask the coachee to describe what a camera or work record could show. Separate those observations from inferred motives, predictions and personal judgements.

02 Write the interpretation that is driving action. Ask how certain the coachee feels, while making clear that confidence is not evidence.

03 Collect supporting evidence and deliberately seek an exception or contrary example. Do not turn the exercise into a debate in which the coach must prove the coachee wrong.

QUESTIONS TO OPEN THINKING

What did you observe, and what did you infer?

What would be hard to explain if your interpretation were fully correct?

How could you ask without accusing?

CONTINUE THE METHOD

04 Generate at least two plausible alternative explanations, including a system condition. Identify what evidence would distinguish them.

05 Choose an ethical information-gathering action, such as a neutral question or a review of timing, rather than covertly testing a colleague.

06 Revise the interpretation provisionally and decide the next action. Retain uncertainty where evidence remains insufficient.

BOUNDARY & CAUTION

Do not use this to invalidate reports of discrimination, bullying or safety concerns. Appropriate formal routes remain available.

BETWEEN SESSIONS / HAND-OFF

Capture one interpretation during the week and one piece of evidence that could change it.

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

BASIS H01 / H04 | Original executive application

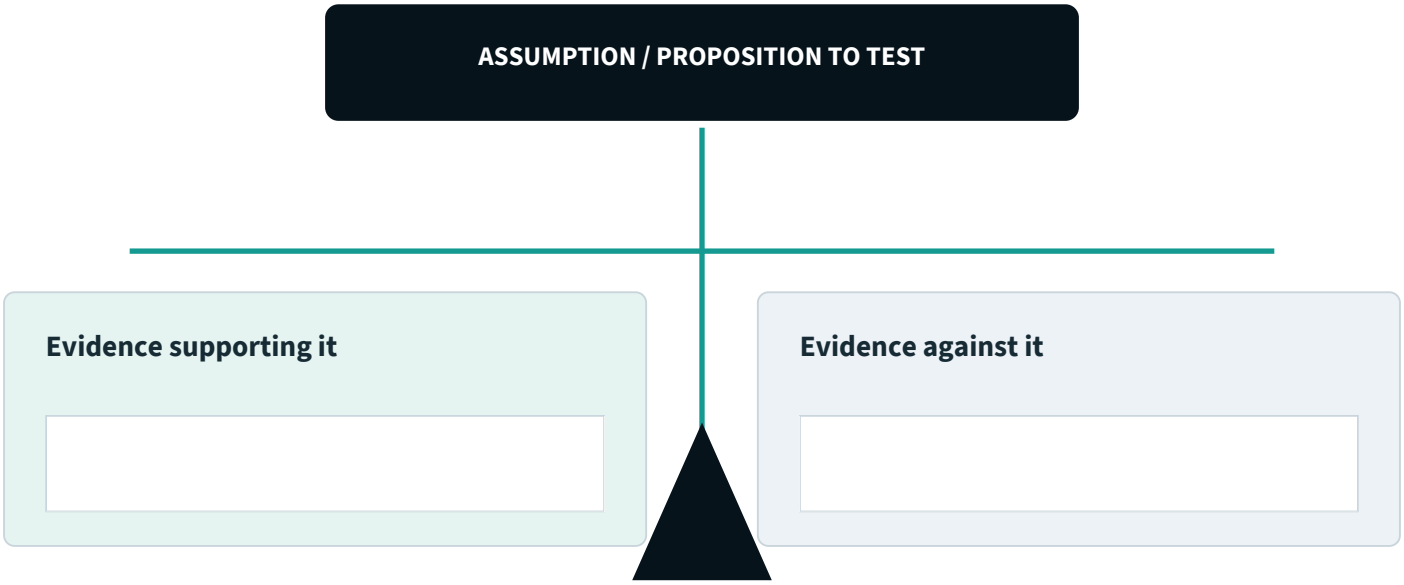
X27 Assumptions and contrary evidence

ACTIVITY

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

Guide Worksheet Example LIVE WORKSHEET

ASSUMPTION EVIDENCE BALANCE



A contrary example may change the explanation. Evidence is not weighed by how persuasive it sounds.

01 Observed event

02 Initial interpretation

03 Supporting and contrary evidence

04 Alternatives

05 Information action

06 Provisional conclusion

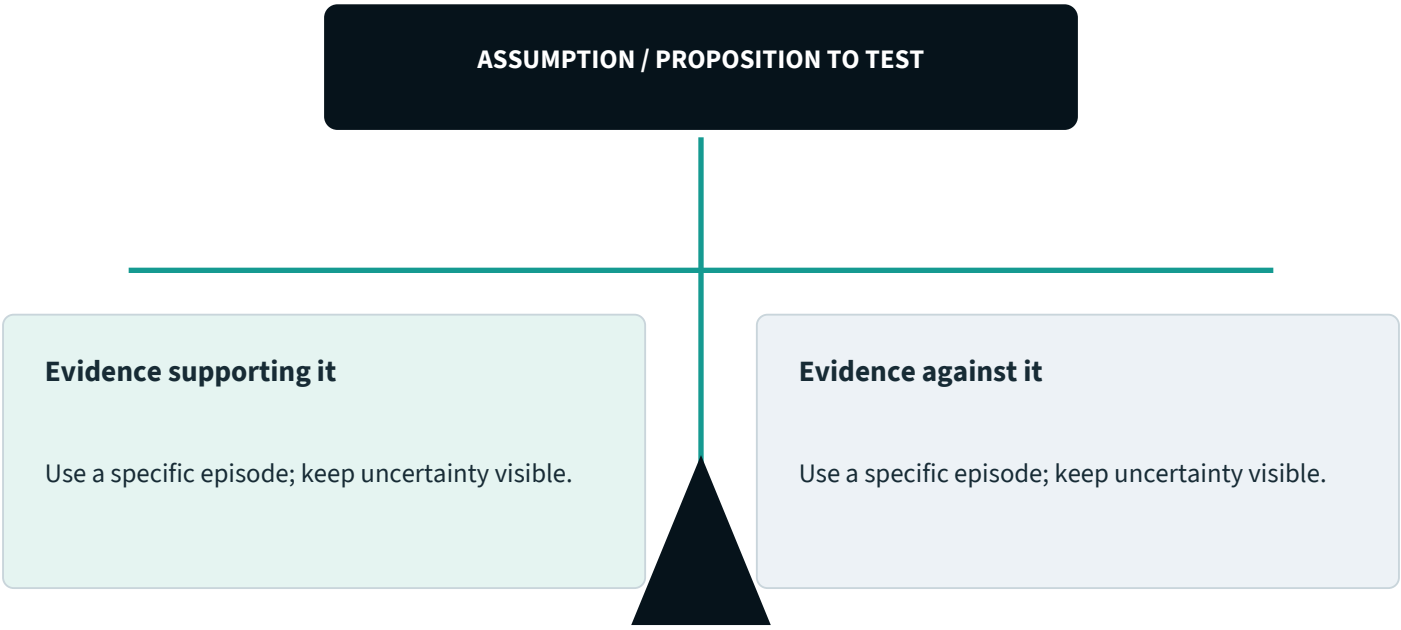
Basis: H01 / H04 | Original executive application

X27 Assumptions and contrary evidence

ACTIVITY

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

ASSUMPTION EVIDENCE BALANCE



A contrary example may change the explanation. Evidence is not weighed by how persuasive it sounds.

01 Observed event

A peer did not comment during the meeting and raised a concern the following day.

02 Initial interpretation

The peer was undermining M-07's decision.

03 Supporting and contrary evidence

The late concern was real; in another meeting the same peer raised a risk early when invited before the recommendation.

04 Alternatives

The peer needed more evidence, felt the decision was settled or was avoiding public disagreement.

05 Information action

Ask when the concern became clear and what would help surface it earlier.

06 Provisional conclusion

Change the meeting sequence and evidence timing before assuming hostile intent.

Basis: H01 / H04 | Original executive application

X28

ACTIVITY

Control, influence and system action

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

Practical guide | Working form | Worked example

EXCEL TAB X28 Control influence and syste

TIME 40 minutes

BRING One current challenge | Known decision rights | A blank three-column worksheet

RUN THE ACTIVITY

01 Describe the challenge in a single concrete sentence and identify the desired work outcome. Avoid beginning with a list of people to change.

02 Place possible actions in three areas: within the coachee's authority, requiring agreement or influence, and outside current authority requiring escalation or acceptance.

03 Test each placement. A leader may have more influence than they assume, but cannot claim control over another person's choices or bypass governance.

QUESTIONS TO OPEN THINKING

What can you decide, rather than merely hope for?

Whose agreement is needed?

What should be escalated rather than carried privately?

CONTINUE THE METHOD

04 Identify one immediate action and one collaborative conversation. For a system issue, name the appropriate owner and the information needed for a decision.

05 Explore the cost of repeatedly acting outside authority or waiting for certainty. Choose a feasible step without implying that structural constraints are merely a mindset problem.

06 Record the boundary and review trigger. Revisit the map when authority or circumstances change.

BOUNDARY & CAUTION

Do not suggest that injustice, unsafe conditions or systemic barriers can be solved solely by changing the coachee's attitude.

BETWEEN SESSIONS / HAND-OFF

Take one action in your authority and one request to the correct owner. Bring the response, including refusal or uncertainty.

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

BASIS H01 | Original executive application

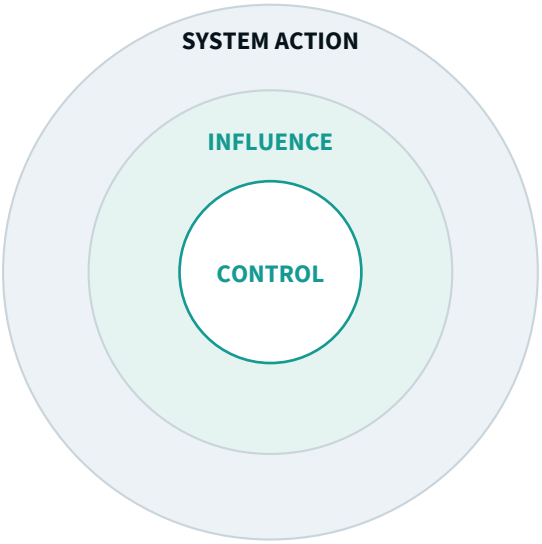
X28 Control, influence and system action

ACTIVITY

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

Guide **Worksheet** Example LIVE WORKSHEET

CONTROL / INFLUENCE / SYSTEM CIRCLES



My action

A conversation or request

An owner beyond coaching

Separate what you can do, what you can influence and what requires accountable system action.

01 Challenge

02 Within authority

03 Requires agreement

04 System action

05 Immediate step

06 Review trigger

Basis: H01 | Original executive application

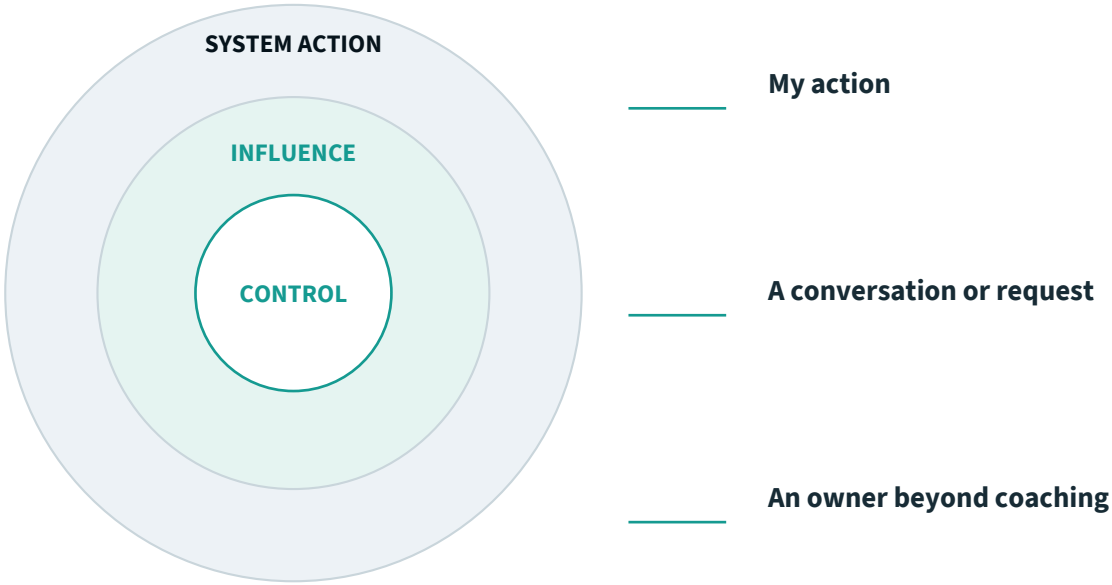
X28 Control, influence and system action

ACTIVITY

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

CONTROL / INFLUENCE / SYSTEM CIRCLES



Separate what you can do, what you can influence and what requires accountable system action.

01 Challenge

Evidence arrives too late for a useful gate discussion.

02 Within authority

M-07 can circulate the decision question earlier and clarify the minimum brief.

03 Requires agreement

Specialists and commercial colleagues must agree evidence deadlines and exception handling.

04 System action

Supplier-contract response requirements need the procurement owner's decision.

05 Immediate step

Agree the next gate's evidence checkpoint with the relevant leads.

06 Review trigger

If the supplier dependency still prevents preparation, escalate the documented pattern rather than repeatedly rescuing the brief.

Basis: H01 | Original executive application

X29

ACTIVITY

Leadership context wheel

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

Practical guide | Working form | Worked example

EXCEL TAB X29 Leadership context wheel

TIME 45 minutes

BRING Six headings: mandate, relationships, resources, capability, feedback and opportunity | Current goal | Optional personal ratings with locally defined anchors

RUN THE ACTIVITY

01 Draw six spokes and explain that the wheel is an original reflection aid. The coachee can rename a heading to fit the actual role.

02 Describe each condition using a recent example. If ratings help discussion, define the endpoints together and record them; no number has a normative meaning.

03 Ask where conditions interact. Strong capability cannot compensate indefinitely for unclear authority or absent resources.

QUESTIONS TO OPEN THINKING

What does a workable condition look like for this role?

Which two conditions reinforce each other?

What would change in work if this spoke improved?

CONTINUE THE METHOD

04 Select one condition whose improvement would make the coaching goal more feasible. Look for an organisational action as well as a personal action.

05 Define an observable signal and a responsible owner. Do not average the spokes or infer overall readiness from a rounded shape.

06 Retain the first version and review the evidence later. Changes in understanding may explain a different rating as much as changes in the condition itself.

BOUNDARY & CAUTION

The wheel is not a validated readiness, wellbeing or leadership assessment. Avoid fixed cut-offs, colour-only judgements or comparisons between people.

BETWEEN SESSIONS / HAND-OFF

Revisit one condition after a real work event and record what changed in evidence, not just the rating.

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

BASIS H01 / H02 | Original executive application

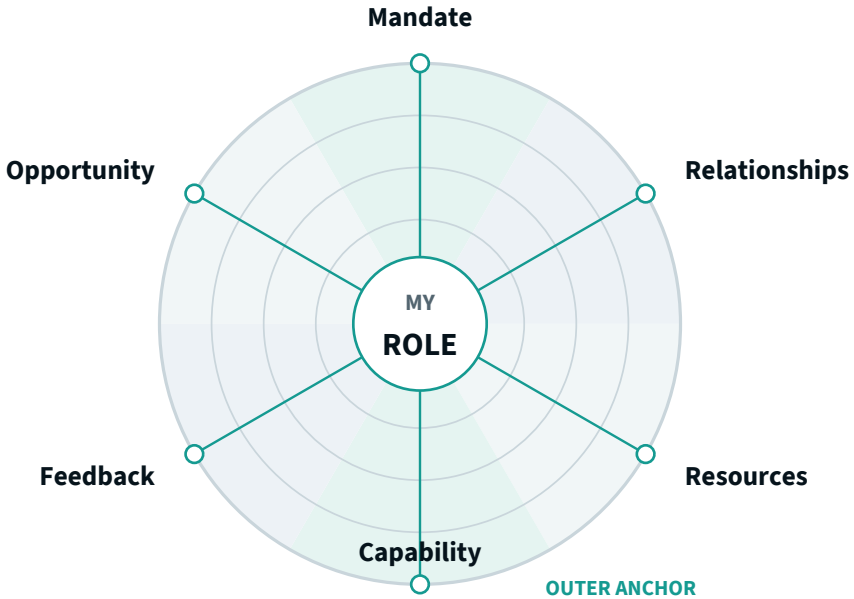
X29 Leadership context wheel

ACTIVITY

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

Guide **Worksheet** Example LIVE WORKSHEET

SIX-SPOKE LEADERSHIP CONTEXT WHEEL



INNER ANCHOR

OUTER ANCHOR

Words or optional locally anchored positions; no total, comparison norm or ideal wheel.

01 Mandate

02 Relationships

03 Resources

04 Capability and feedback

05 Priority condition

06 Review evidence

Basis: H01 / H02 | Original executive application

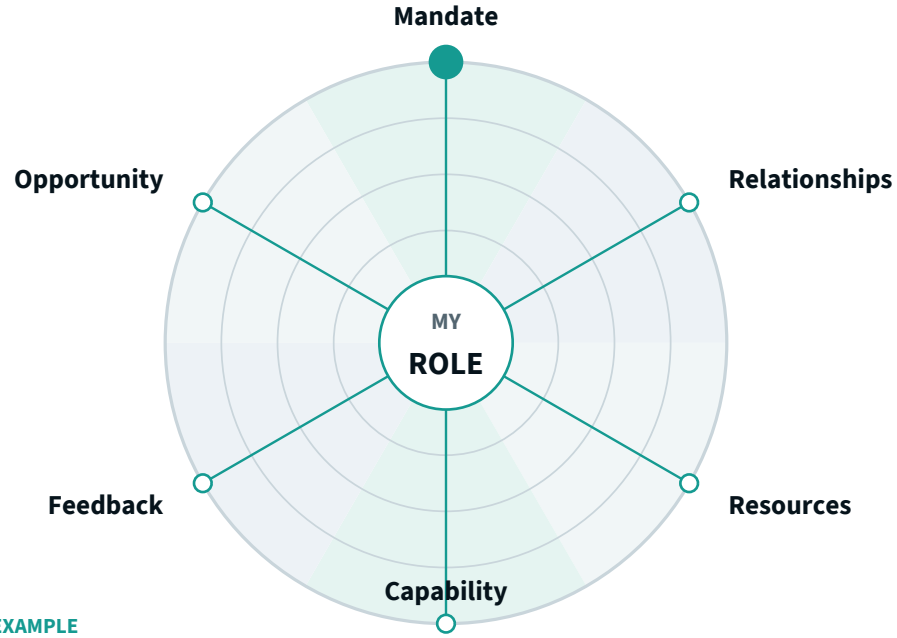
X29 Leadership context wheel

ACTIVITY

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

SIX-SPOKE LEADERSHIP CONTEXT WHEEL



PRIORITY IN THE SOURCE EXAMPLE

Mandate: clarify the decision boundary before the next gate.

Words or optional locally anchored positions; no total, comparison norm or ideal wheel.

01 Mandate

Integrated recommendation owned by M-07; material scope authority still needs clarification.

02 Relationships

Specialists are willing to contribute but evidence expectations vary.

03 Resources

Preparation time exists on paper but is repeatedly interrupted.

04 Capability and feedback

M-07 can frame options; feedback on inviting challenge is mixed.

05 Priority condition

Clarify the decision boundary and protect one evidence checkpoint.

06 Review evidence

Use the next two gate records and colleague accounts; no total score or ideal wheel is calculated.

Basis: H01 / H02 | Original executive application

X30

ACTIVITY

Integrated coaching formulation

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

Practical guide | Working form | Worked example

EXCEL TAB X30 Integrated coaching formula

TIME 60 minutes

BRING Contracted goal | Work episodes and proportionate assessment evidence | Known constraints and counterexamples

RUN THE ACTIVITY

01 Ask the coachee to restate the goal and why it matters now. Confirm that the original contract still fits before synthesising evidence.

02 Organise the evidence into situation, behaviour, consequences, strengths and conditions. Label report findings by evidence type and separate assumptions from observations.

03 Explore one plausible maintaining pattern and at least one alternative explanation. Include relationships, authority and work design rather than locating every issue inside the person.

QUESTIONS TO OPEN THINKING

What account fits the evidence without explaining too much?

What else could be happening?

What would make us change our minds?

CONTINUE THE METHOD

04 Identify the leverage points: a conversation, a rehearsal, a workplace experiment or a system request. Choose the smallest useful combination, not a large treatment plan.

05 Agree how the hypothesis could be tested and what would make you revise it. The coachee may reject the coach's formulation or prefer a simpler description.

06 Write a brief shared formulation and an action sequence. Record what is excluded, who owns system actions and what may be shared with the sponsor.

BOUNDARY & CAUTION

A coaching formulation is a shared work hypothesis, not a clinical diagnosis, hidden personality analysis or automatic employment decision.

BETWEEN SESSIONS / HAND-OFF

Read the formulation privately, edit anything that does not fit, then choose the first experiment you genuinely own.

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

BASIS H01 / H04 / R04 | Original executive application

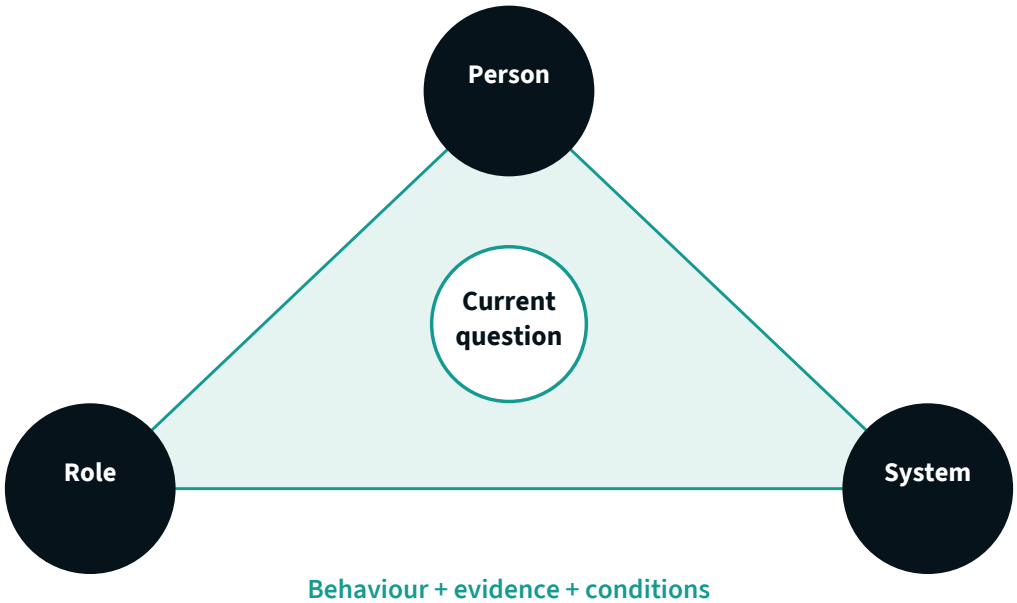
X30 Integrated coaching formulation

ACTIVITY

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

Guide **Worksheet** Example LIVE WORKSHEET

PERSON-ROLE-SYSTEM FORMULATION



Behaviour + evidence + conditions

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

01 Goal

02 Evidence

03 Working pattern

04 Alternative explanation

05 Leverage points

06 Test and review

Basis: H01 / H04 / R04 | Original executive application

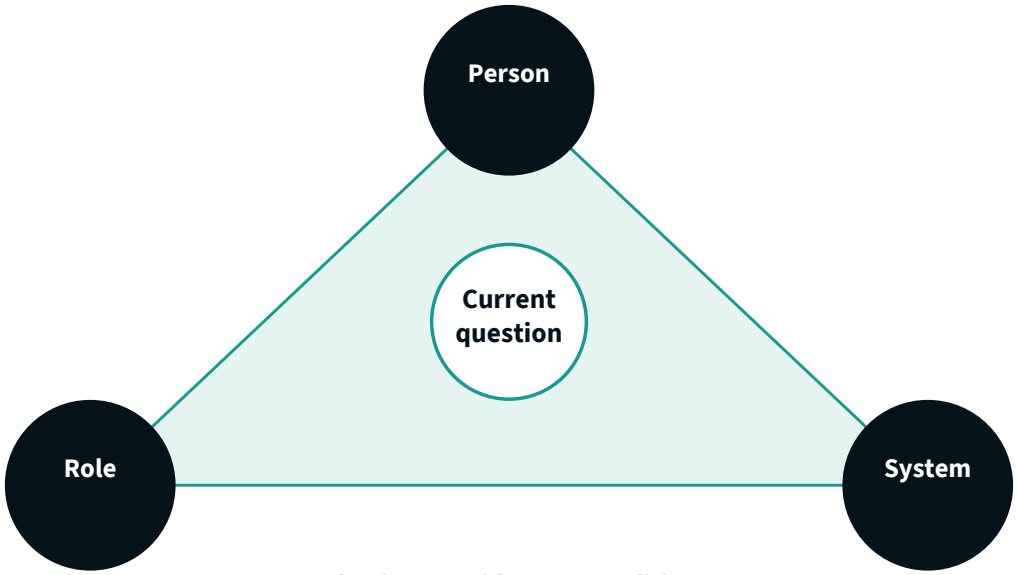
X30 Integrated coaching formulation

ACTIVITY

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

PERSON-ROLE-SYSTEM FORMULATION



Behaviour + evidence + conditions

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

01 Goal

Lead gate decisions with clearer ownership and more useful challenge.

02 Evidence

Two late-evidence episodes, an authorised preference report and consented stakeholder accounts; none alone establishes a cause.

03 Working pattern

Unclear checkpoints increase uncertainty; M-07 responds by taking over, which may reduce others' ownership.

04 Alternative explanation

Supplier dependencies could continue to cause delay even with better leadership practice.

05 Leverage points

Agree checkpoints, rehearse concerns-first questions and request clarification of scope authority.

06 Test and review

Review two gate cycles; revise the formulation if ownership improves but delay remains, and address the system dependency separately.

Basis: H01 / H04 / R04 | Original executive application

THE 6A WORKPLACE COACHING SYSTEM

04

Activate

Dialogue should expand choice

THE GATE

Does dialogue expand agency?

MINIMUM OUTPUT

Insight + options + commitment

38 TOOLS & ACTIVITIES

Open the stage tool directory >

Activate: tools to use

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

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

BEFORE YOU MOVE ON

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

Activate: tools to use

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

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

BEFORE YOU MOVE ON

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

Activate: tools to use

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

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

BEFORE YOU MOVE ON

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

Dialogue should expand choice

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

Contract the session afresh

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

Listen before structuring

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

Choose the right depth

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

Generate options before closing

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

Practise the difficult moment

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

End with owned action or deliberate reflection

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

ACTIVATE / OPERATING ROUTE

Choose the next useful move.

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

01

Open a useful session

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

02

Find possibilities

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

03

Examine interpretations

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

04

Make a choice

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

05

Rehearse the interaction

X45-X51 / Challenge, feedback, conflict and boundaries

GATE REVIEW

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

BASIS H01-H04 | Route selection is an original editorial aid

T37

TOOL

Session planning canvas

Prepare without scripting or controlling the coachee's agenda.

Practical guide | Working form | Worked example

EXCEL TAB T37 Session planning canvas

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

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

RUN THE ACTIVITY

01 Re-read the engagement purpose, prior commitments and any known change in context.

02 Hold a tentative possible focus while leaving the coachee free to set today's useful agenda.

03 Check the coach's emotion, assumptions, bias and readiness to be present.

QUESTIONS TO OPEN THINKING

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

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

What will this completed record change in practice?

COMMON ERRORS TO AVOID

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

CONTINUE THE METHOD

04 Prepare a small choice of questions, reflection methods or experiments and test any boundary concern.

05 Reserve time and secure handling for post-session notes, follow-up and supervision needs.

BOUNDARY & CAUTION

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

BETWEEN SESSIONS / HAND-OFF

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

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

BASIS H01 / H04 | H04 source p.164

T37

TOOL

Session planning canvas

Prepare without scripting or controlling the coachee's agenda.

Practical guide | Working form | Worked example

EXCEL TAB T37 Session planning canvas

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

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

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

T37

TOOL

Session planning canvas

Prepare without scripting or controlling the coachee's agenda.

Practical guide | Working form | Worked example

EXCEL TAB T37 Session planning canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

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

WHAT THE COACH SHOULD NOTICE

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

TRANSFER / NEXT DECISION

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

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T38

TOOL

GROW conversation guide

Structure a focused coaching conversation around goal, reality, options and way forward.

Practical guide | Working form | Worked example

EXCEL TAB T38 GROW conversation guide

TIME 20-45 minutes for a focused GROW conversation, with a brief check-in on the agreed follow-up date. | OWNER Coach/manager

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Goal: agree what would make the conversation useful and check that the goal is genuinely the coachee's.

02 Reality: explore what is happening now, using evidence, context and the coachee's meaning.

03 Options: generate alternatives, consequences and resources before evaluating or narrowing them.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Marching through GROW questions mechanically when emotion or contracting needs attention; Supplying the options and leaving the coachee to select the coach's answer; Ending with intention but no owner, timing, context or learning check.

CONTINUE THE METHOD

04 Way forward: choose the action, timing, support and learning evidence with clear ownership.

05 Follow-up: agree when progress will be reviewed and what may trigger adaptation.

BOUNDARY & CAUTION

Do not use GROW when a directive, formal performance, investigation, crisis or specialist-support conversation is actually required.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.167

T38 GROW conversation guide

TOOL

Structure a focused coaching conversation around goal, reality, options and way forward.

Guide **Worksheet** Example LIVE WORKSHEET

G

Goal What would make this useful?

R

Reality What is happening; what evidence and meaning?

O

Options What else; consequences; resources?

W

Way forward What will you do, when, and how will you learn?

Contract check Whose goal is this?

Follow-up When and how progress is reviewed

Basis: H01 / H04 | H04 source p.167

T38 GROW conversation guide

TOOL

Structure a focused coaching conversation around goal, reality, options and way forward.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

G

Goal What would make this useful?

Leave with an opening for Thursday's commercial review that enables a decision without overstating certainty.

R

Reality What is happening; what evidence and meaning?

Ground data remain incomplete; Commercial fears cost drift, while M-07 fears early disclosure will undermine confidence.

O

Options What else; consequences; resources?

Delay, present one estimate, compare bounded scenarios, request staged authority or escalate the unresolved threshold.

W

Way forward What will you do, when, and how will you learn?

Draft a criteria-first slide today, rehearse with the engineering lead Wednesday and ask Commercial to test both scenarios Thursday.

Contract check Whose goal is this?

M-07 selects the experiment; it serves their stated goal, not the coach's preferred communication style.

Follow-up When and how progress is reviewed

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.167

T39

TOOL

CLEAR conversation guide

Use Contract-Listen-Explore-Action-Review for relational or complex work.

Practical guide | Working form | Worked example

EXCEL TAB T39 CLEAR conversation guide

TIME 45-75 minutes for a full CLEAR cycle; relationship and action review at the next session. | OWNER Coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Contract: agree the purpose, roles, boundaries and way of working for this dialogue.

02 Listen: attend to story, emotion, system and silence without rushing to a solution.

03 Explore: surface patterns, assumptions, relationships and credible alternative meanings.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Compressing contracting and listening to reach action as quickly as possible; Exploring only the individual's thinking while ignoring relationship and system dynamics; Reviewing task progress but not the usefulness, challenge or quality of the relationship.

CONTINUE THE METHOD

04 Action: let the coachee choose a bounded experiment or decision and required support.

05 Review: examine learning about both the topic and the coaching relationship, then re-contract if needed.

BOUNDARY & CAUTION

Do not use CLEAR as a linear script or continue relational exploration beyond coaching competence when clinical or safeguarding support is indicated.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.170

T39 CLEAR conversation guide

TOOL

Use Contract-Listen-Explore-Action-Review for relational or complex work.

Guide **Worksheet** Example LIVE WORKSHEET

C

Contract Purpose and way of working

L

Listen Story, emotion, system and silence

E

Explore Patterns, assumptions and alternatives

A

Action Chosen experiment or decision

R

Review Learning about topic and relationship

Basis: H01 / H04 | H04 source p.170

T39 CLEAR conversation guide

TOOL

Use Contract-Listen-Explore-Action-Review for relational or complex work.

Retained fictional source extract; unpopulated fields are identified.

C

Contract Purpose and way of working

Explore why challenge with Commercial stalls and agree a useful experiment for the next gate conversation.

L

Listen Story, emotion, system and silence

M-07 describes frustration, careful preparation and a repeated sense that dissent threatens project credibility.

E

Explore Patterns, assumptions and alternatives

Test authority, identity, incentives and relationship history; distinguish evidence from assumptions about the Commercial Director's response.

A

Action Chosen experiment or decision

Open with shared criteria, name two uncertainties and invite Commercial to identify the strongest contrary evidence.

R

Review Learning about topic and relationship

M-07 reports useful challenge and sufficient safety; both agree the coach should interrupt lengthy technical defence sooner.

Basis: H01 / H04 | H04 source p.170

T40

TOOL

OSKAR solution-focused guide

Build on desired outcome, existing resources and small steps.

Practical guide | Working form | Worked example

EXCEL TAB T40 OSKAR solutionfocused guide

TIME 20-40 minutes, with a 10-15 minute scaling and progress review after the next action opportunity. | OWNER Coach/manager

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Outcome: describe what the coachee wants instead in concrete, useful terms.

02 Scaling: establish the present 0-10 position and what makes it that number rather than lower.

03 Know-how: identify exceptions, existing resources and occasions when part of the outcome already occurs.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using the scale as a performance rating reported to the sponsor; Forcing optimism and affirmations that the participant does not experience as credible; Using solution focus to avoid material harm, conflict or organisational constraints.

CONTINUE THE METHOD

04 Affirm/action: acknowledge evidenced capability and choose the smallest step toward the next scale point.

05 Review: rescale after action, identify what improved and decide how to repeat or adapt it.

BOUNDARY & CAUTION

Do not use solution focus to bypass harm, grief, discrimination, conflict facts or root causes that first require acknowledgement and action.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.173

T40 OSKAR solution-focused guide

TOOL

Build on desired outcome, existing resources and small steps.

O

Outcome What do you want instead?

S

Scaling Where are you now, 0-10?

K

Know-how What is already working?

A

Affirm/action Which resource and next step?

R

Review What improved and how?

Basis: H01 / H04 | H04 source p.173

T40 OSKAR solution-focused guide

TOOL

Build on desired outcome, existing resources and small steps.

Retained fictional source extract; unpopulated fields are identified.

O

Outcome What do you want instead?

A gate conversation where uncertainty is visible, challenge improves the recommendation and ownership remains clear.

S

Scaling Where are you now, 0-10?

M-07 rates current practice 5 of 10: criteria are clearer, but dissent is still invited late.

K

Know-how What is already working?

At the utilities review, opening with dependencies and asking Engineering first produced constructive alternatives.

A

Affirm/action Which resource and next step?

Reuse the concise visual map and invite the most affected function before stating M-07's preferred option.

R

Review What improved and how?

After the next review, compare the scale, decision record and stakeholder observation to identify what shifted.

Basis: H01 / H04 | H04 source p.173

T41

TOOL

Powerful question planner

Create concise inquiry without interrogation or hidden advice.

Practical guide | Working form | Worked example

EXCEL TAB T41 Powerful question planner

TIME 15-25 minutes to plan and rehearse, then 10 minutes to review selected questions after use. | OWNER Coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Name the awareness or decision the question is intended to serve.

02 Draft one short, open question with no embedded advice or multiple clauses.

03 Expose presuppositions, judgement, preferred answers and power effects hidden in the wording.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Stacking several questions or embedding the coach's preferred explanation; Prioritising a clever formulation over plain language the coachee can process; Failing to inspect cultural, cognitive or power assumptions carried by the question.

CONTINUE THE METHOD

04 Create a simpler, more neutral and accessible alternative for the same purpose.

05 Use one question, allow silence and review what the coachee actually did with it.

BOUNDARY & CAUTION

Do not mistake provocative wording for a powerful question; hidden advice, stacked questions and unnecessary cognitive load reduce agency.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.176

T41

TOOL

Powerful question planner

Create concise inquiry without interrogation or hidden advice.

Practical guide | Working form | Worked example

EXCEL TAB T41 Powerful question planner

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Purpose What the question serves	
Question Open, short and one at a time	
Assumption What it may smuggle in	
Access Language and cognitive load	
Alternative Simpler or more neutral version	
Response What the coachee did with it	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T41

TOOL

Powerful question planner

Create concise inquiry without interrogation or hidden advice.

Practical guide | Working form | Worked example

EXCEL TAB T41 Powerful question planner

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose What the question serves	Help M-07 examine an assumption about executive confidence without implying that the assumption is false.
Question Open, short and one at a time	What tells you that naming uncertainty early would reduce the sponsor's confidence in your leadership?
Assumption What it may smuggle in	The wording may privilege observable evidence and underweight tacit knowledge, identity or prior consequences.
Access Language and cognitive load	Ask one clause at a time, allow reflection and clarify whether 'confidence' means trust, certainty or approval.
Alternative Simpler or more neutral version	What might happen if you named one important uncertainty earlier than usual?

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T42

TOOL

Listening observation sheet

Develop listening beyond facts and chronology.

Practical guide | Working form | Worked example

EXCEL TAB T42 Listening observation sheet

TIME 30-60 minutes of observed practice and 30-45 minutes for evidence-based feedback and development planning. | OWNER Coach/supervisor

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Agree the observed segment, consent, evidence focus and how notes or recordings will be handled.

02 Record separately the facts/story, expressed or implied emotion, and values at stake.

03 Mark repeated patterns, contradictions, avoidance and the role of power or system context.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Recording inferred emotion or intention as if the coachee stated it; Listening only for narrative content while missing values, power and repeated patterns; Repurposing a coaching observation sheet as evidence for employment assessment.

CONTINUE THE METHOD

04 Observe how silence and each coach response affected depth, agency or direction.

05 Debrief with behavioural evidence and select one listening practice to test and re-observe.

BOUNDARY & CAUTION

Do not observe or record without explicit consent, trained interpretation and proportionate controls for confidential material.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.179

T42

TOOL

Listening observation sheet

Develop listening beyond facts and chronology.

Practical guide | Working form | Worked example

EXCEL TAB T42 Listening observation sheet

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Content Facts, sequence and stated meaning	
Emotion Named and implied affect	
Values What matters	
Pattern Repetition, contradiction or avoidance	
System Power, roles and context	
Silence What space enabled	
Coach response Impact of reflection or question	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T42

TOOL

Listening observation sheet

Develop listening beyond facts and chronology.

Practical guide | Working form | Worked example

EXCEL TAB T42 Listening observation sheet

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Content Facts, sequence and stated meaning	M-07 reports a revised estimate, a Friday deadline and disagreement over who can authorise contingency movement.
Emotion Named and implied affect	Frustration is named; longer pauses and faster speech suggest concern when executive credibility is discussed.
Values What matters	Professional reliability, candour, collective responsibility and protecting the team from avoidable last-minute change.
Pattern Repetition, contradiction or avoidance	Detailed explanation expands whenever authority is uncertain; alternatives and personal impact appear only after prompting.
System Power, roles and context	Commercial-delivery power is uneven, the sponsor rewards concise certainty and the gate template hides unresolved assumptions.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T43

TOOL

Challenge with permission

Offer observations that increase awareness without imposing a verdict.

Practical guide | Working form | Worked example

EXCEL TAB T43 Challenge with permission

TIME 10-20 minutes within a session, including consent and repair; revisit impact before or at the next session. | OWNER Coach/manager

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Clarify how naming the discrepancy or avoidance could serve the coachee's agreed goal.

02 Ask permission to offer a potentially challenging observation and accept a no.

03 State the specific behaviour tentatively, separating observation from interpretation and possible impact.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Delivering challenge as a verdict rather than a tentative behavioural observation; Seeking permission ceremonially and continuing after the coachee declines or pauses; Exaggerating possible impact without asking what the coachee makes of it.

CONTINUE THE METHOD

04 Invite the coachee's meaning, attend to emotion and avoid defending the challenge.

05 Repair or re-contract if it lands poorly, then agree any coachee-owned learning or action.

BOUNDARY & CAUTION

Do not challenge to display insight, force disclosure or win an interpretation, especially where power makes refusal or disagreement unsafe.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.182

T43 Challenge with permission

TOOL

Offer observations that increase awareness without imposing a verdict.

Guide **Worksheet** Example LIVE WORKSHEET

Purpose Why challenge may serve the goal

Permission How consent is sought

Observation Specific, behavioural and tentative

Impact Possible consequence

Inquiry What does the coachee make of it?

Response Emotion and meaning

Repair What is needed if challenge lands poorly

Basis: H01 / H04 | H04 source p.182

T43 Challenge with permission

TOOL

Offer observations that increase awareness without imposing a verdict.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Purpose Why challenge may serve the goal

Test whether additional technical detail is protecting credibility while inadvertently delaying the decision M-07 wants.

Permission How consent is sought

May I offer a specific pattern I noticed and hear what fits or does not?

Observation Specific, behavioural and tentative

When we reached authority uncertainty, your explanation lengthened and the two available choices disappeared from view.

Impact Possible consequence

A stakeholder may debate detail instead of engaging the ownership and risk decision requiring resolution.

Inquiry What does the coachee make of it?

What do you notice, and what function might the extra detail be serving in that moment?

Response Emotion and meaning

Not populated in the original worked extract.

Repair What is needed if challenge lands poorly

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.182

T44

TOOL

Values-to-choice map

Clarify competing values and make deliberate trade-offs.

Practical guide | Working form | Worked example

EXCEL TAB T44 Valuestochoice map

TIME 30-45 minutes for one dilemma, with a 15-minute review after the decision has been tested in practice. | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 State the decision or dilemma without prematurely reducing it to two choices.

02 Name the legitimate value each option protects and the evidence that it matters here.

03 Surface the practical, relational and identity cost attached to protecting each value.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using values language to rationalise a choice already preferred by the coach; Creating a false binary and overlooking options that honour both competing goods; Ignoring safety, legal, ethical or organisational constraints on the available choices.

CONTINUE THE METHOD

04 Choose the trade-off and boundary that best reflects who the coachee intends to be.

05 Act, review consequences and learning, and revise the choice if the evidence warrants it.

BOUNDARY & CAUTION

Do not frame a decision as a values conflict when legal duties, safety requirements or organisational authority remove one of the apparent options.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.185

T44

TOOL

Values-to-choice map

Clarify competing values and make deliberate trade-offs.

Practical guide | Working form | Worked example

EXCEL TAB T44 Valuestochoice map

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Choice Decision or dilemma	
Value A What would be protected	
Value B Competing good	
Cost What each choice asks	
Identity Who the coachee wants to be	
Action Choice and boundary	
Review Evidence and learning	

T44

TOOL

Values-to-choice map

Clarify competing values and make deliberate trade-offs.

Practical guide | Working form | Worked example

EXCEL TAB T44 Valuestochoice map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Choice Decision or dilemma	Escalate the contingency-authority ambiguity now or continue negotiating informally until evidence is more complete.
Value A What would be protected	Early escalation protects candour, timely governance and the team's ability to plan within explicit boundaries.
Value B Competing good	Continued dialogue protects working relationships, local ownership and the possibility of resolving disagreement without hierarchy.
Cost What each choice asks	Escalation may feel adversarial; delay risks rework, compressed scrutiny and accountability without sufficient authority.
Identity Who the coachee wants to be	M-07 wants to be a candid, collaborative director who names material uncertainty before it becomes crisis.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T45

TOOL

Assumption testing canvas

Turn a limiting certainty into a safe test.

Practical guide | Working form | Worked example

EXCEL TAB T45 Assumption testing canvas

TIME 35-45 minutes; 10-minute review after the test | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 State one consequential assumption as a claim that evidence could disconfirm.

02 List observations supporting it, separating direct evidence from interpretation.

03 Seek exceptions and missing evidence rather than defending the claim.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Writing an assumption as a fact that cannot be disproved; Searching only for observations that support the preferred explanation; Designing a test too broad or risky to interpret safely.

CONTINUE THE METHOD

04 Generate at least two plausible explanations for the same observations.

05 Run the smallest safe test, compare predictions and update the assumption.

BOUNDARY & CAUTION

Do not use assumption testing to dismiss a verified constraint or expose anyone to a high-stakes test.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.188

T45 Assumption testing canvas

TOOL

Turn a limiting certainty into a safe test.

Guide **Worksheet** Example LIVE WORKSHEET

Assumption Belief stated clearly

Evidence for Observations supporting it

Evidence against Exceptions or missing data

Alternative Other plausible explanation

Safe test Small action

Prediction Expected result

Learning What happened and what changed

Basis: H01 / H04 | H04 source p.188

T45 Assumption testing canvas

TOOL

Turn a limiting certainty into a safe test.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Assumption Belief stated clearly

Commercial leads resist early challenge because they believe it slows investment approvals.

Evidence for Observations supporting it

Three recent gate meetings ended discussion when commercial risks were raised late.

Evidence against Exceptions or missing data

Two commercial leads requested earlier options workshops on comparably complex projects.

Alternative Other plausible explanation

Decision papers may arrive too late for useful challenge, irrespective of relationships.

Safe test Small action

Circulate criteria and options 48 hours early, then compare challenge quality at one gate.

Prediction Expected result

Not populated in the original worked extract.

Learning What happened and what changed

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.188

T46

TOOL

Immunity-to-change map

Explore hidden commitments that compete with a desired change.

Practical guide | Working form | Worked example

EXCEL TAB T46 Immunitytochange map

TIME 60-90 minutes; revisit only after a safe test | OWNER Experienced coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Define an improvement goal the coachee genuinely wants and can influence.

02 List what the coachee does and avoids that sustains the gap.

03 Ask what worrying consequence might follow if each behaviour changed.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Treating protective behaviour as resistance or lack of commitment; Stopping at the stated goal without surfacing the competing commitment; Testing the big assumption first in a high-stakes sponsor interaction.

CONTINUE THE METHOD

04 Translate recurring worries into a competing commitment and big assumption.

05 Design a low-risk assumption test, then review evidence without forcing change.

BOUNDARY & CAUTION

Do not treat the map as diagnosis or explore trauma-related protection without consent, competence and an appropriate route.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.191

T46 Immunity-to-change map

TOOL

Explore hidden commitments that compete with a desired change.

Guide **Worksheet** Example LIVE WORKSHEET

Improvement goal Meaningful desired change

Doing/not doing Behaviours maintaining status quo

Worry What might happen if behaviour changed

Competing commitment Protection implied by worry

Big assumption Belief making protection necessary

Test Safe evidence-gathering experiment

Basis: H01 / H04 | H04 source p.191

T46 Immunity-to-change map

TOOL

Explore hidden commitments that compete with a desired change.

Retained fictional source extract; unpopulated fields are identified.

Improvement goal Meaningful desired change

Challenge the sponsor's preferred option respectfully before three consecutive investment decisions.

→

Doing/not doing Behaviours maintaining status quo

I soften questions, wait for others and omit dissenting evidence from summaries.

→

Worry What might happen if behaviour changed

Direct challenge could mark me as obstructive and weaken sponsor confidence.

→

Competing commitment Protection implied by worry

Preserve approval pace and remain viewed as a dependable delivery leader.

Big assumption Belief making protection necessary

If I question a preferred option publicly, the sponsor will stop trusting me.

Test Safe evidence-gathering experiment

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.191

T47

TOOL

Decision quality canvas

Improve strategic decisions without supplying the answer.

Practical guide | Working form | Worked example

EXCEL TAB T47 Decision quality canvas

TIME 45-60 minutes; up to 90 for material decisions | OWNER Executive coach

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 State the decision, deadline, owner and any non-negotiable authority boundary.

02 Set and, where useful, weight decision criteria before comparing options.

03 Map known, uncertain and missing evidence against each criterion.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Choosing criteria after attachment to an option has formed; Presenting uncertain or missing evidence as a complete business case; Excluding delay, no action and conditional approval from the option set.

CONTINUE THE METHOD

04 Generate credible options, including conditions, delay and no action.

05 Name likely biases, seek disconfirming challenge and record the decision rationale.

BOUNDARY & CAUTION

This canvas supports judgment; it does not replace engineering, commercial, legal, safety or delegated-authority due diligence.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.194

T47

TOOL

Decision quality canvas

Improve strategic decisions without supplying the answer.

Practical guide | Working form | Worked example

EXCEL TAB T47 Decision quality canvas

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Decision What must be decided and by when	
Criteria What good must satisfy	
Evidence Known, uncertain and missing	
Options Including delay/no action	
Bias Attachment, pressure and framing	
Stakeholders Impact and voice	
Choice Decision and review trigger	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T47

TOOL

Decision quality canvas

Improve strategic decisions without supplying the answer.

Practical guide | Working form | Worked example

EXCEL TAB T47 Decision quality canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision What must be decided and by when	Decide by 15 December whether to extend coaching beyond the twelve-person pilot.
Criteria What good must satisfy	Ethical quality, equitable access, applied behaviour, useful outcomes and affordable capacity must meet thresholds.
Evidence Known, uncertain and missing	Ten participants applied the routine; alliance is strong, but transfer data cover only eight.
Options Including delay/no action	Extend unchanged, expand with conditions, hold for evidence, redesign the pathway or stop.
Bias Attachment, pressure and framing	The sponsor publicly endorsed coaching, creating pressure to interpret mixed evidence positively.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T48

TOOL

Difficult conversation rehearsal

Prepare a high-stakes conversation through practice and feedback.

Practical guide | Working form | Worked example

EXCEL TAB T48 Difficult conversation rehe

TIME 30-45 minutes; repeat briefly before the conversation | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Define the useful outcome and any safety or formal-process boundary.

02 Separate observable facts from assumptions about the counterpart's motives.

03 Draft a concise message linking facts, impact, need and invitation.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Mixing interpretation and motive into the statement of facts; Memorising a speech without preparing to listen and adapt; Rehearsing how to win instead of how to reach a workable outcome.

CONTINUE THE METHOD

04 Explore the counterpart's plausible perspective without inventing certainty.

05 Rehearse opening, difficult responses, listening and a specific workable close.

BOUNDARY & CAUTION

Do not rehearse an informal conversation where safety, harassment, grievance or another protected formal process requires specialist handling.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.197

T48 Difficult conversation rehearsal

TOOL

Prepare a high-stakes conversation through practice and feedback.

Guide Worksheet Example LIVE WORKSHEET

Outcome What the conversation must achieve

Facts Observable evidence

Message Clear and respectful core

Perspective Other party's likely concerns

Rehearsal Opening and pivotal moments

Feedback Impact of words, tone and pace

Contingency Response to resistance or emotion

Basis: H01 / H04 | H04 source p.197

T48 Difficult conversation rehearsal

TOOL

Prepare a high-stakes conversation through practice and feedback.

Retained fictional source extract; unpopulated fields are identified.

Outcome What the conversation must achieve

Agree earlier commercial involvement without blaming the procurement lead for previous delays.

Facts Observable evidence

Commercial review began five days before gate; two pricing assumptions then required rework.

Message Clear and respectful core

I need commercial review at options stage so we can resolve assumptions before gate papers freeze.

Perspective Other party's likely concerns

Procurement faces competing deadlines and may hear this request as criticism of its service.

Rehearsal Opening and pivotal moments

Practise opening, pause for response, acknowledge workload and propose one trial workflow.

Feedback Impact of words, tone and pace

Not populated in the original worked extract.

Contingency Response to resistance or emotion

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.197

T49

TOOL

Feedback and feedforward planner

Seek behavioural evidence and turn it into future action.

Practical guide | Working form | Worked example

EXCEL TAB T49 Feedback and feedforward pl

TIME 30-45 minutes plus a 15-minute pattern review | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Select one observable behaviour connected to the coaching goal.

02 Agree appropriate sources and ask one behaviour-level feedback question.

03 Gather concrete examples, including helpful, difficult and contradictory evidence.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Requesting personality judgments rather than observable behaviour examples; Cherry-picking comfortable comments and dismissing a recurring difficult pattern; Turning contextual feedback into a fixed conclusion about identity or capability.

CONTINUE THE METHOD

04 Identify patterns by context, impact and source rather than counting opinions.

05 Form a provisional meaning and choose one feedforward experiment to test it.

BOUNDARY & CAUTION

Do not gather covert feedback or repurpose developmental observations for an undisclosed employment decision.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.200

T49

TOOL

Feedback and feedforward planner

Seek behavioural evidence and turn it into future action.

Practical guide | Working form | Worked example

EXCEL TAB T49 Feedback and feedforward pl

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Behaviour Specific area	
Sources Relevant observers	
Question Neutral and actionable	
Pattern Themes and exceptions	
Meaning Coachee interpretation	
Feedforward Future behaviour request	
Test Next work moment	

T49

TOOL

Feedback and feedforward planner

Seek behavioural evidence and turn it into future action.

Practical guide | Working form | Worked example

EXCEL TAB T49 Feedback and feedforward pl

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Behaviour Specific area	I close discussion after the first viable option instead of inviting structured dissent.
Sources Relevant observers	Two peers, the sponsor and three self-reviewed gate recordings supplied behaviour-level observations.
Question Neutral and actionable	When did my facilitation make it easier or harder to challenge the leading option?
Pattern Themes and exceptions	Questions broaden early, then narrow immediately after the sponsor signals a preference.
Meaning Coachee interpretation	My pace protects certainty but may suppress evidence needed for a robust decision.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T50

TOOL

Session close and commitment

Consolidate learning and create accountable next action.

Practical guide | Working form | Worked example

EXCEL TAB T50 Session close and commitmen

TIME 10-15 minutes at every session close | OWNER Coach + coachee

BRING Current goal/formulation and session contract | Coachee preference and readiness | Relevant real-work situations

RUN THE ACTIVITY

01 Invite the coachee to name the most useful learning in their words.

02 Clarify the choice they are making, including any choice to pause.

03 Convert intention into one specific action with a cue or date.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Ending with several intentions and no clear priority; Recording an action without a date, cue or review point; Naming support that breaches confidentiality or removes coachee ownership.

CONTINUE THE METHOD

04 Check feasibility, risk, support and what remains deliberately unshared.

05 Confirm how evidence will be noticed and when commitment will be reviewed.

BOUNDARY & CAUTION

Do not force a commitment when reflection, consent, competence or operational safety requires pause or referral.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.203

T50

TOOL

Session close and commitment

Consolidate learning and create accountable next action.

Practical guide | Working form | Worked example

EXCEL TAB T50 Session close and commitmen

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Learning What is clearer or different	
Choice What the coachee has decided	
Action Specific next step	
When Date/situation	
Support Resource or person	
Evidence What will show progress	
Confidence 0-10 and what would raise it	
Carry-forward Next session possibility	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T50

TOOL

Session close and commitment

Consolidate learning and create accountable next action.

Practical guide | Working form | Worked example

EXCEL TAB T50 Session close and commitmen

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Learning What is clearer or different	I confuse a fast decision with a well-tested decision when sponsor pressure rises.
Choice What the coachee has decided	I will pause after criteria are stated and explicitly request one contrary view.
Action Specific next step	Send the decision-framing agenda to Thursday's package-board members before noon Wednesday.
When Date/situation	At Thursday's 09:00 package board, before the preferred contractor is discussed.
Support Resource or person	A peer will observe only the agreed behaviours and provide private feedback afterwards.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

X31

ACTIVITY

Describe the preferred future

Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.

Practical guide | Working form | Worked example

EXCEL TAB X31 Describe the preferred futu

TIME 40 minutes

BRING An agreed work question | A near-term situation | Permission to use future-focused questions

RUN THE ACTIVITY

01 Ask what the coachee would like to be different in a specific situation. Acknowledge the current difficulty without requiring a complete causal explanation first.

02 Invite a description of what they would do and what others could observe if the situation were more useful. Replace broad adjectives with actions, words and decisions.

03 Ask what would be different first, before the whole problem is solved. Keep the future within operational and ethical constraints.

QUESTIONS TO OPEN THINKING

What would you notice first?

What would a colleague hear you say differently?

Where is a small part of that already happening?

CONTINUE THE METHOD

04 Explore whether any part of that future already occurs. Identify existing resources and conditions rather than constructing an entirely new personality.

05 Choose a small action that the coachee is willing to try and specify the opportunity. Check that it does not depend on controlling someone else's response.

06 Ask what evidence would indicate progress, no change or an unintended effect. Agree a review rather than promising that future-focused thinking itself will produce the outcome.

BOUNDARY & CAUTION

Future-focused questions must not minimise harm, unresolved grievances or conditions needing formal action. Use another approach when the person needs those issues acknowledged first.

BETWEEN SESSIONS / HAND-OFF

Write three observable signs of a better meeting and notice one at the next opportunity.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R10 | Original executive application

X31 Describe the preferred future

ACTIVITY

Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.

Guide **Worksheet** Example LIVE WORKSHEET

PREFERRED-FUTURE BACKCAST

01

Preferred future

02

A credible signal

03

First useful move

NOW NEXT USEFUL SIGNAL FUTURE

Make the story observable and workable, not an idealised promise.

01 Current question

02 Preferred scene

03 First observable difference

04 Existing exception

05 Action

06 Evidence

Basis: H01 / H04 / R10 | Original executive application

X31 Describe the preferred future

ACTIVITY

Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

PREFERRED-FUTURE BACKCAST

01	02	03
Preferred future	**A credible signal**	**First useful move**
Observable work	Real constraints	A bounded experiment

NOW → NEXT USEFUL SIGNAL → FUTURE

Make the story observable and workable, not an idealised promise.

01 Current question

How can M-07 invite challenge without losing direction in gate meetings?

02 Preferred scene

The decision question is clear, concerns are heard and the recommendation is adjusted where evidence warrants it.

03 First observable difference

M-07 asks for missing evidence before presenting the preferred option.

04 Existing exception

A recent handover used this sequence and surfaced one important dependency early.

05 Action

Use the sequence at the next gate and retain the formal decision boundary.

06 Evidence

Record whether a concern changed the recommendation and ask participants whether the opportunity to contribute was clear.

Basis: H01 / H04 / R10 | Original executive application

X32

ACTIVITY

Find the useful exception

Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.

Practical guide | Working form | Worked example

EXCEL TAB X32 Find the useful exception

TIME 35 minutes

BRING A recurring, bounded work difficulty | At least one recent exception | A record of relevant contextual differences

RUN THE ACTIVITY

01 Ask for a time when the difficulty was less intense, shorter or absent. Do not insist there must be a success story if the coachee cannot identify one.

02 Reconstruct the exception: what was different before, during and after the event, including others' actions and environmental conditions.

03 Ask what the coachee contributed, while avoiding the assumption that they caused the entire difference.

CONTINUE THE METHOD

04 Compare the exception with the usual pattern. Identify one repeatable element and one condition that may not be transferable.

05 Choose a modest repeat of the useful element and check its fit with the next situation. A tactic that helped once may not help everywhere.

06 Define a learning question and review the result. If no exception exists, use a small exploratory experiment rather than inventing one.

QUESTIONS TO OPEN THINKING

When was this even slightly easier?

What did you or others do differently before the difficulty began?

Which part can you repeat, and which was specific to that situation?

BOUNDARY & CAUTION

Do not use exceptions to dismiss a person's account of persistent barriers or to suggest that serious harm is solved by positive thinking.

BETWEEN SESSIONS / HAND-OFF

Notice and record one small exception without forcing it to become a success narrative.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R10 | Original executive application

X32 Find the useful exception

ACTIVITY

Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.

Guide **Worksheet** Example LIVE WORKSHEET

01 Usual pattern

02 Exception

03 Different conditions

04 Repeatable element

05 Non-transferable condition

06 Next test

Basis: H01 / R10 | Original executive application

X32 Find the useful exception

ACTIVITY

Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.

01 Usual pattern

M-07 answers a specialist's question immediately and ends up owning the solution.

02 Exception

At a prepared review, M-07 asked for the specialist's options first and ownership remained with them.

03 Different conditions

The evidence was available early and the decision boundary was explicit.

04 Repeatable element

Ask for options and reasoning before offering an answer.

05 Non-transferable condition

An urgent safety issue may require immediate instruction rather than exploratory questioning.

06 Next test

Use the question at one routine recommendation review, then ask whether it helped ownership and clarity.

Basis: H01 / R10 | Original executive application

X33

ACTIVITY

Scaling and one step better

Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.

Practical guide | Working form | Worked example

EXCEL TAB X33 Scaling and one step better

TIME 30 minutes

BRING One specific goal | A personally meaningful scale | A current work opportunity

RUN THE ACTIVITY

01 Agree the exact question being scaled, such as confidence to lead a particular conversation. Define zero and ten in the coachee's own observable terms.

02 Ask where the person places themselves today and what evidence supports that position. Treat the number as a conversation aid, not a precise measurement.

03 Explore why the position is not lower, identifying resources and existing practices. Avoid pressuring the person to give a more positive rating.

QUESTIONS TO OPEN THINKING

What tells you that you are at this point?

What is already helping?

What would one step better look like in the next conversation?

CONTINUE THE METHOD

04 Ask what one step higher would look like in behaviour or preparation. Do not assume that ten is necessary or desirable for the task.

05 Choose an action that could support that small movement and check practical conditions. A task may be worth doing with uncertainty still present.

06 Agree to review both the action and its consequence. Retain the original anchors so a later rating is not interpreted without context.

BOUNDARY & CAUTION

No normative comparison or psychometric interpretation is justified. Keep confidence, readiness, importance and performance as different questions.

BETWEEN SESSIONS / HAND-OFF

Take the one-step action and return with a work example, whether or not the number changes.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R10 | Original executive application

X33 Scaling and one step better

ACTIVITY

Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.

ANCHORED ONE-STEP SCALE

DEFINE THE QUESTION AND BOTH ENDPOINTS FIRST



My 0

My 10

A personal discussion scale, not a norm. Retain the original anchors when reviewing change.

01 Scale question

02 Anchors

03 Current position

04 Existing resource

05 One-step action

06 Review

Basis: H01 / H04 / R10 | Original executive application

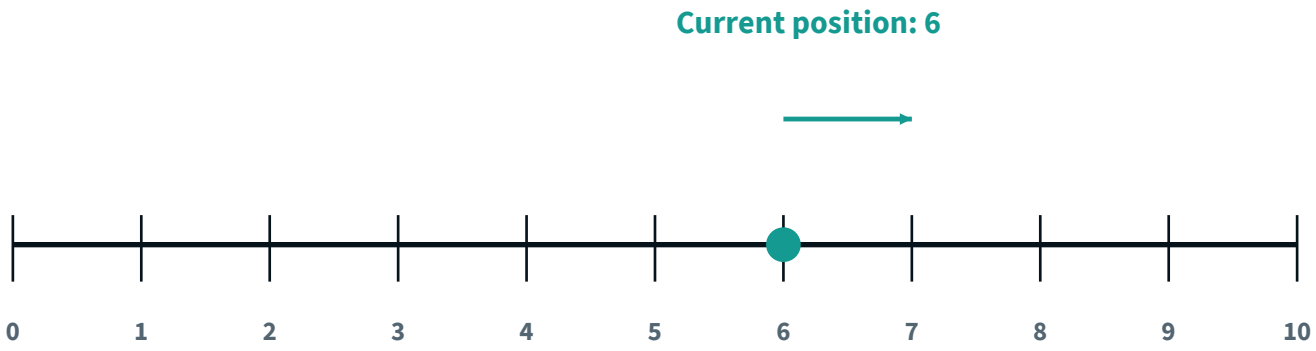
X33 Scaling and one step better

ACTIVITY

Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.

ANCHORED ONE-STEP SCALE

DEFINE THE QUESTION AND BOTH ENDPOINTS FIRST



Rehearse one challenging objection; the next rating is not assumed.

A personal discussion scale, not a norm. Retain the original anchors when reviewing change.

01 Scale question

Readiness to ask for challenge before stating a gate recommendation.

02 Anchors

Zero: no usable opening or boundary; ten: prepared opening, clear authority and a tested response to disagreement.

03 Current position

M-07 chooses six because the brief is clear but the response to a strong objection is unpractised.

04 Existing resource

A previous handover used a useful concerns-first sequence.

05 One-step action

Rehearse a challenging objection and practise summarising it before deciding.

06 Review

After the meeting, compare what happened with the anchors; the rating is not a competence percentage.

Basis: H01 / H04 / R10 | Original executive application

X34

ACTIVITY

Perspective positions

Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.

Practical guide | Working form | Worked example

EXCEL TAB X34 Perspective positions

TIME 45 minutes

BRING One work interaction | Three labelled spaces: own view, other view, observer | An option to remain seated and use written columns

RUN THE ACTIVITY

01 Describe the interaction from the coachee's own position: what they observed, intended, needed and assumed. Keep the discussion within the agreed work remit.

02 Invite an imagined view from the other role, explicitly labelling it a hypothesis. Ask what that person might be protecting or needing, without claiming to know their thoughts.

03 Move to an observer perspective and describe the sequence between people rather than assigning blame. Use accessible written or verbal alternatives to physical movement.

QUESTIONS TO OPEN THINKING

What might this look like from their role?

What are we imagining rather than knowing?

What could you ask to check your interpretation?

CONTINUE THE METHOD

04 Compare the three accounts and identify assumptions that need checking. Notice where the coachee's behaviour could be interpreted differently from their intention.

05 Choose a neutral question to ask the other person and a behaviour to adjust. Avoid constructing a persuasive tactic around an unverified psychological story.

06 Rehearse the conversation and decide how to review it. Update the map using the person's actual response.

BOUNDARY & CAUTION

This is perspective-taking, not mind-reading or a diagnostic technique. Do not infer hidden motives, trauma or identity from imagined roles.

BETWEEN SESSIONS / HAND-OFF

Ask one checking question in the real relationship and revise the imagined perspective accordingly.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

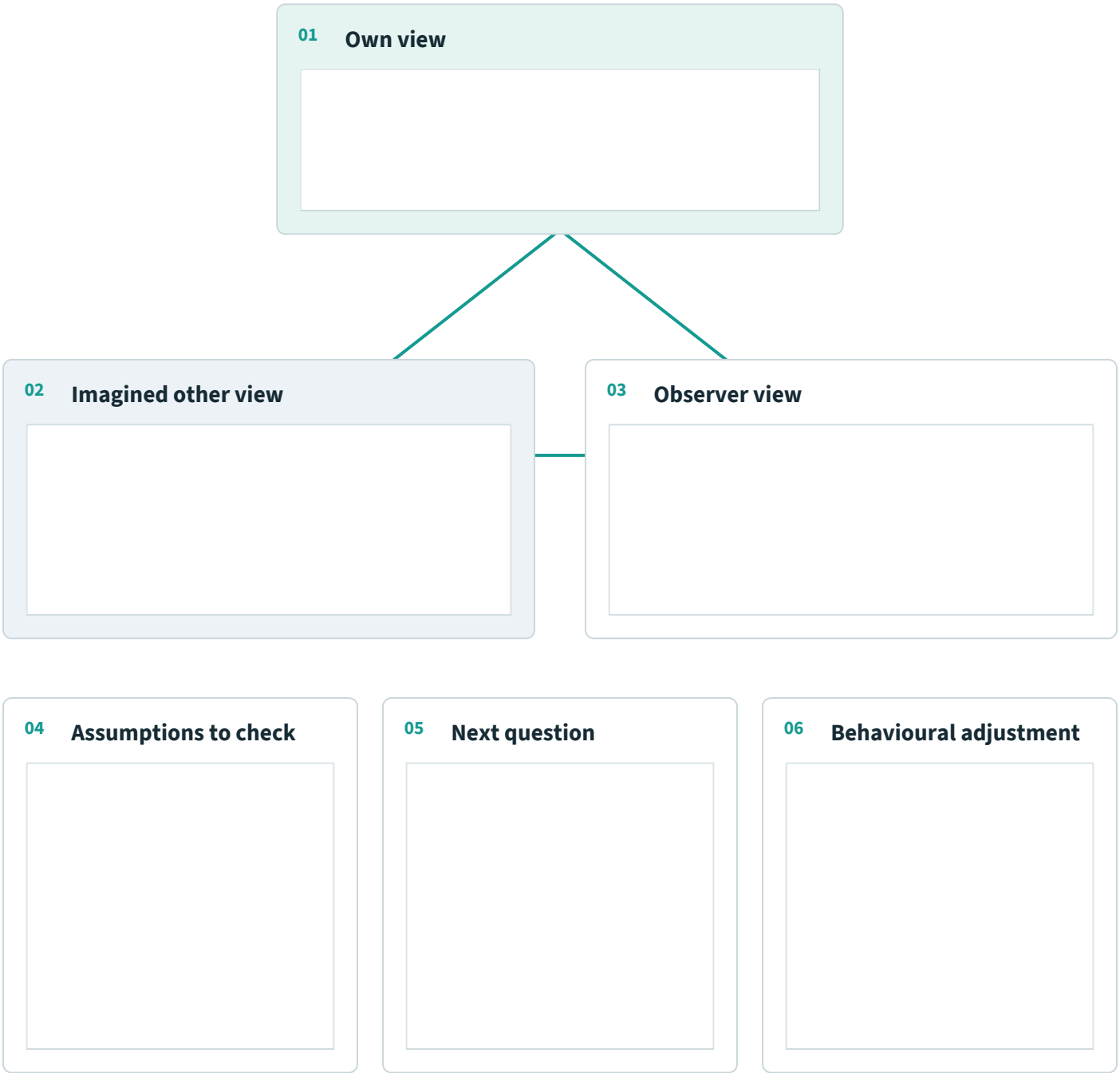
BASIS H01 / H04 | Original executive application

X34 Perspective positions

ACTIVITY

Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.

Guide **Worksheet** Example LIVE WORKSHEET



Basis: H01 / H04 | Original executive application

X34 Perspective positions

ACTIVITY

Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

01 Own view

M-07 experienced a late objection as a challenge to their authority.

02 Imagined other view

The engineering lead may have thought the decision was already settled or needed further evidence.

03 Observer view

M-07 stated a preference early; the lead spoke briefly; the concern appeared after the meeting.

04 Assumptions to check

Whether the concern existed during the meeting and whether the lead felt able to raise it.

05 Next question

When did this concern become clear, and what would help us surface it at the right point?

06 Behavioural adjustment

Invite concerns before stating the recommendation, then check whether the sequence helped.

Basis: H01 / H04 | Original executive application

X35

ACTIVITY

Weighted decision comparison

Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.

Practical guide | Working form | Worked example

EXCEL TAB X35 Weighted decision compariso

TIME 60 minutes

BRING Two to four feasible options | Evidence for decision criteria | Clear decision authority

RUN THE ACTIVITY

01 Define the decision, its owner and the date by which it must be made. Separate mandatory constraints from preferences before considering scores.

02 Agree no more than five criteria and what a score of zero to four means for each. Choose weights that sum to one hundred and explain their relative importance.

03 Score options using evidence, marking missing information instead of substituting optimistic numbers. Do not score an option through a mandatory failure.

QUESTIONS TO OPEN THINKING

What must be true before an option is even eligible?

Which weight could change the ranking?

What matters that the table does not capture?

CONTINUE THE METHOD

04 Calculate weighted totals as an aid to comparison. Examine how the result changes when a disputed weight or score is varied; a narrow margin is not certainty.

05 Discuss qualitative consequences, reversibility and who bears the risk. The highest total may still be inappropriate if an unscored concern is material.

06 Record the decision, reasons, assumptions and review trigger. Keep the original scores so later learning does not rewrite the reasoning.

BOUNDARY & CAUTION

Scores are local judgements, not probabilities or validated scales. Do not use the matrix to conceal mandatory legal, safety or ethical constraints.

BETWEEN SESSIONS / HAND-OFF

Obtain one missing piece of evidence and rerun only the relevant comparison; document any change in reasoning.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X35 Weighted decision comparison

ACTIVITY

Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.

Guide **Worksheet** Example LIVE WORKSHEET

WEIGHTED DECISION MATRIX

Criteria	Weight	Option A	Option B	Option C

Check mandatory conditions before comparing weighted totals.

Use locally agreed 0-4 anchors. Weights sum to 100; mandatory conditions remain separate.

01 **Decision**

02 **Options and constraints**

03 **Criteria and weights**

04 **Evidence and scores**

05 **Uncertainty**

06 **Decision and review**

Basis: H01 / H04 | Original executive application

X35 Weighted decision comparison

ACTIVITY

Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

WEIGHTED DECISION MATRIX

Criteria	Weight	Option A	Option B	Option C
Decision clarity	35		4	
Participation	25		3	
Preparation burden	20		3	
Timeliness	20		4	

Check mandatory conditions before comparing weighted totals.

B = concerns-first brief: 3.55 / 4. Other options are unscored in the source extract.

01 Decision

Select a format for the next cross-functional gate review.

02 Options and constraints

Keep the current format, use a shorter concerns-first brief, or add a separate preparation meeting; all must preserve technical assurance.

03 Criteria and weights

Decision clarity 35, participation 25, preparation burden 20, timeliness 20; scores zero to four with agreed anchors.

04 Evidence and scores

The concerns-first brief scores 4,3,3,4; the weighted total is 3.55 out of 4.

05 Uncertainty

Preparation burden is an estimate; increasing its weight may reduce the advantage.

06 Decision and review

Pilot the concerns-first brief once, then review actual burden, clarity and any missed assurance.

Basis: H01 / H04 | Original executive application

X36

ACTIVITY

Premortem for a leadership experiment

Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.

Practical guide | Working form | Worked example

EXCEL TAB X36 Premortem for a leadership

TIME 40 minutes

BRING A proposed work experiment | Its intended outcome and constraints | Permission to challenge the plan

RUN THE ACTIVITY

01 Describe the experiment and the result it is intended to support. Ask the coachee to imagine that it was unhelpful, without implying that failure is inevitable.

02 Generate several plausible explanations independently before discussing them. Include execution, assumptions, stakeholder effects and system dependencies.

03 Distinguish preventable issues from uncertainties that require monitoring. Avoid listing dramatic risks with no connection to the actual work.

CONTINUE THE METHOD

04 For the most material concerns, identify an early signal and a practical prevention or recovery action. Give each action an owner.

05 Check that mitigation does not defeat the learning purpose or transfer unreasonable burden to others. Define a stop condition where the experiment should not continue.

06 Revise the plan and return to its positive purpose. Review the assumptions after the test rather than using the premortem to justify inaction.

QUESTIONS TO OPEN THINKING

Suppose this was unhelpful: what plausibly happened?

What would we notice early?

Which safeguard is proportionate rather than excessive?

BOUNDARY & CAUTION

This is an original risk-rehearsal activity, not a prediction model. Do not allow imagined failure to become evidence against a person.

BETWEEN SESSIONS / HAND-OFF

Add the two most useful safeguards to the experiment plan and test whether they helped.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

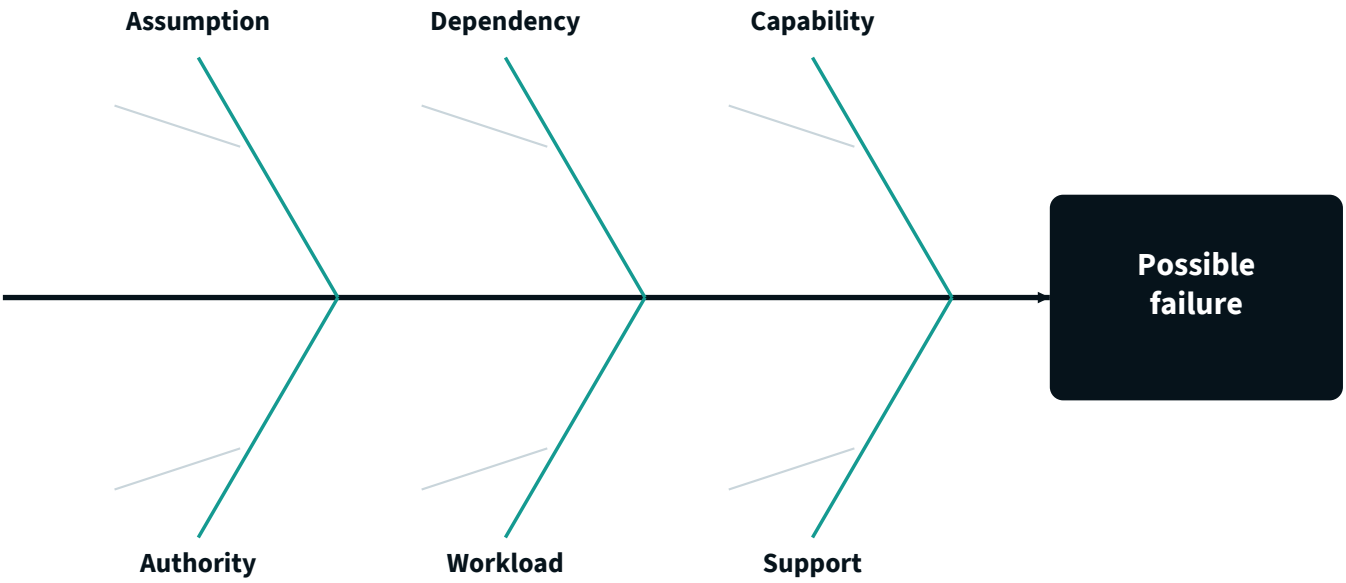
X36 Premortem for a leadership experiment

ACTIVITY

Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.

Guide **Worksheet** Example LIVE WORKSHEET

PREMORTEM CAUSE MAP



Premortem: suppose the experiment failed. Explore plausible reasons; do not treat them as facts.

01 Experiment

02 Possible failure

03 Early signal

04 Prevention

05 Stop or recovery

06 Revised plan

Basis: H01 / H04 | Original executive application

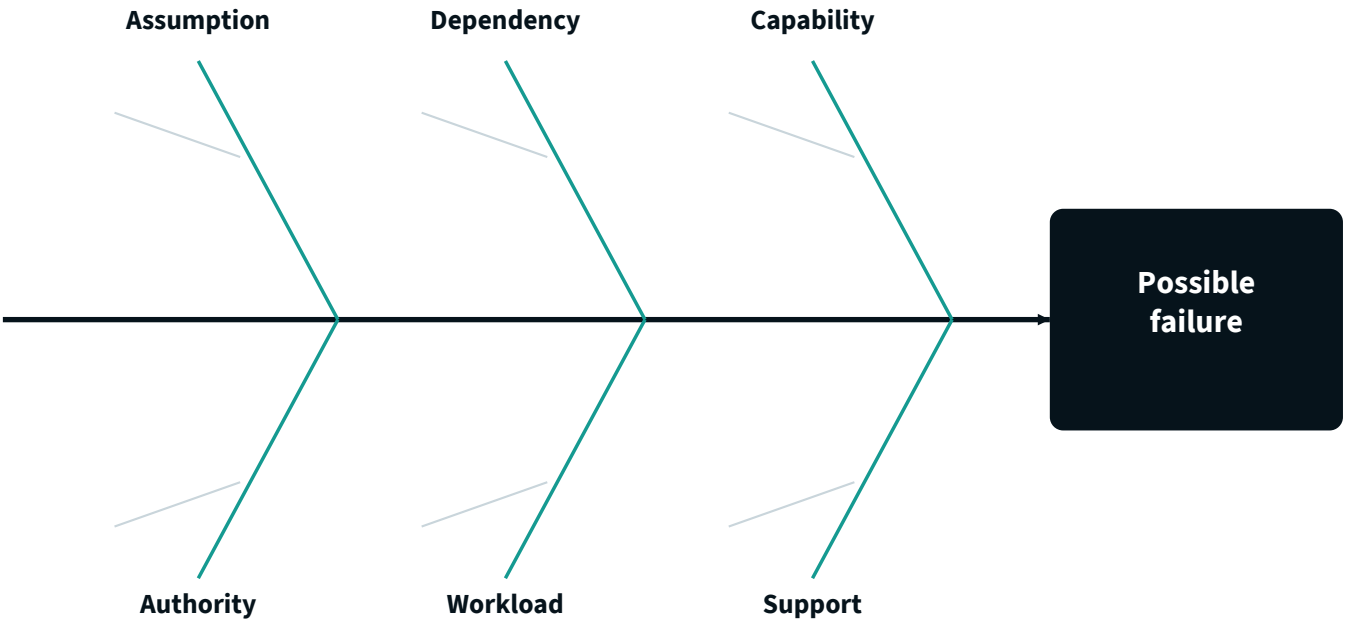
X36 Premortem for a leadership experiment

ACTIVITY

Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.

Guide Worksheet Example FICTIONAL WORKED EXAMPLE

PREMORTEM CAUSE MAP



Premortem: suppose the experiment failed. Explore plausible reasons; do not treat them as facts.

01 Experiment

M-07 will invite challenge before stating a recommendation.

02 Possible failure

The meeting becomes unfocused because the decision question is unclear.

03 Early signal

Participants discuss unrelated issues and cannot name the decision required.

04 Prevention

Circulate the decision question and criteria in advance, with a route for out-of-scope concerns.

05 Stop or recovery

Pause if a mandatory assurance is missing; return to the accountable technical owner rather than forcing a decision.

06 Revised plan

Use a bounded challenge round, summarise the evidence and make the decision within the agreed authority.

Basis: H01 / H04 | Original executive application

X37

ACTIVITY

Strategic zoom

Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.

Practical guide | Working form | Worked example

EXCEL TAB X37 Strategic zoom

TIME 45 minutes

BRING A real decision | Three lenses: now, across the system, later | Available evidence and known uncertainties

RUN THE ACTIVITY

01 Describe the immediate decision and pressure. Ask what must be settled now and what can remain open without creating unacceptable risk.

02 Zoom across the system: identify affected functions, users and dependencies. Ask whether a local improvement could move cost or risk elsewhere.

03 Zoom forward to the relevant future horizon. Explore capability, relationships and precedents created by the decision, distinguishing plausible consequences from speculation.

QUESTIONS TO OPEN THINKING

What is genuinely urgent here?

Where might the cost move if we solve it locally?

What precedent would this create if repeated?

CONTINUE THE METHOD

04 Return to the present and identify the trade-off. A strategic perspective should clarify the next action, not become an excuse for avoiding an operational decision.

05 Generate a response that addresses the immediate need while protecting a longer-term condition. Define who must be consulted and what authority is required.

06 Record the decision and one future signal to monitor. Review whether the broader lens added useful information.

BOUNDARY & CAUTION

Long-range scenarios are not forecasts. Do not use strategic language to bypass urgent safety, employment or technical responsibilities.

BETWEEN SESSIONS / HAND-OFF

Apply the three lenses to one upcoming decision and record which lens actually changed your choice.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

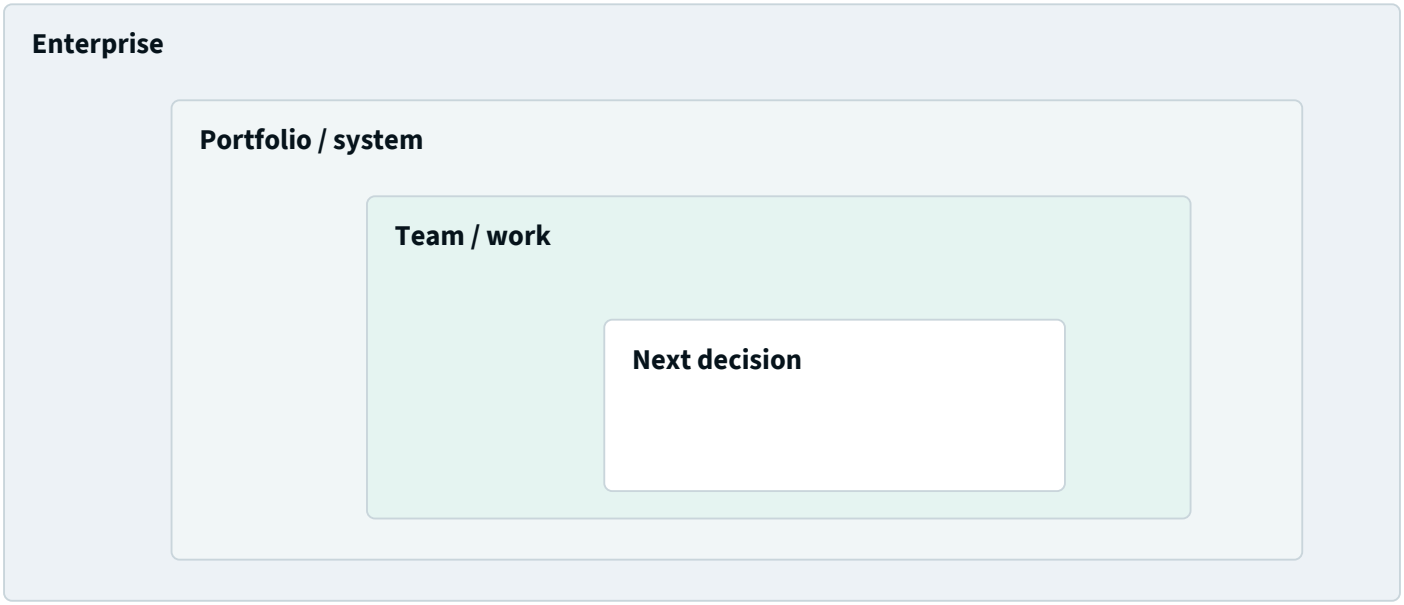
X37 Strategic zoom

ACTIVITY

Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.

Guide **Worksheet** Example LIVE WORKSHEET

STRATEGIC ZOOM FRAMES



Move between levels without losing the decision, the time horizon or the people affected.

01 Immediate issue

02 System view

03 Longer-term view

04 Trade-off

05 Chosen response

06 Review signal

Basis: H01 / H04 | Original executive application

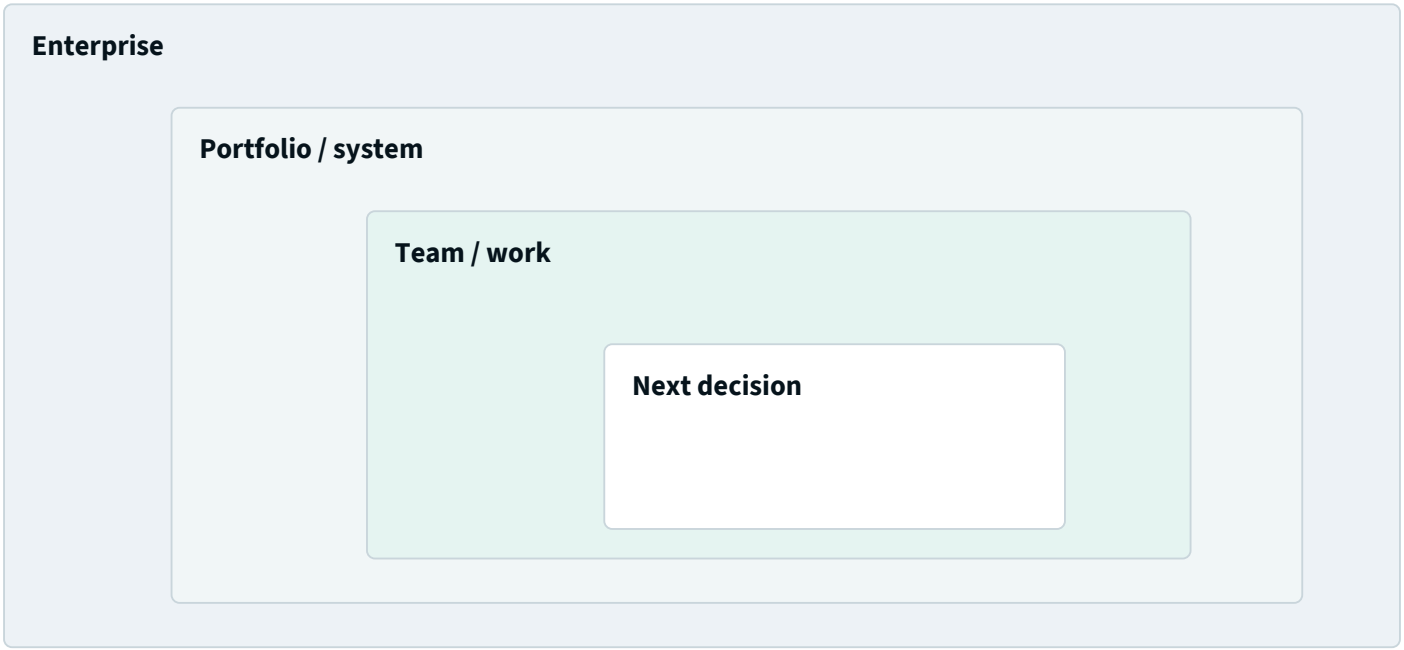
X37 Strategic zoom

ACTIVITY

Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

STRATEGIC ZOOM FRAMES



Move between levels without losing the decision, the time horizon or the people affected.

01 Immediate issue

M-07 could rewrite a late recommendation to meet tomorrow's gate.

02 System view

Doing so may protect the date but reinforce waiting for the director across three functions.

03 Longer-term view

Repeated takeover could weaken specialist ownership and make the director a bottleneck.

04 Trade-off

Protect the gate while building clearer ownership, without experimenting with mandatory assurance.

05 Chosen response

Agree a short evidence checkpoint and ask the specialist to complete the recommendation within an explicit boundary.

06 Review signal

Track whether the next comparable recommendation arrives with clearer ownership and fewer avoidable take-backs.

Basis: H01 / H04 | Original executive application

X38

ACTIVITY

Both-and tension map

Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.

Practical guide | Working form | Worked example

EXCEL TAB X38 Bothand tension map

TIME 50 minutes

BRING A recurring tension such as pace and participation | Examples of each side helping and becoming excessive | Decision constraints

RUN THE ACTIVITY

01 Name the two legitimate needs in neutral language. Check that this is a genuine ongoing tension, not a choice between acceptable and harmful conduct.

02 Describe the value of each side and what happens when it is neglected. Use work episodes rather than abstract advocacy.

03 Explore the downside of overemphasising either side. Avoid implying that every situation requires equal emphasis or compromise.

QUESTIONS TO OPEN THINKING

What does each side protect?

What happens when you overplay it?

What signal would tell you to adjust?

CONTINUE THE METHOD

04 Identify early warning signs that the balance is becoming unhelpful. Ask which signals can be observed by others and how they can raise them safely.

05 Design a small routine that protects both needs, such as a time-bounded challenge round followed by a clear decision. Keep mandatory requirements outside the trade-off.

06 Agree a review rhythm and ownership. The aim is responsive judgement, not a permanently ideal position on a chart.

BOUNDARY & CAUTION

Do not frame discrimination, unsafe conduct or a mandatory standard as a polarity to balance. Use the appropriate formal decision route.

BETWEEN SESSIONS / HAND-OFF

Ask a colleague to notice one agreed warning signal and discuss it without assigning blame.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X38 Both-and tension map

ACTIVITY

Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.

Guide **Worksheet** Example LIVE WORKSHEET

01 Tension

PACE

02 Value of pace

MEANINGFUL CHALLENGE

03 Value of challenge

04 / OVERUSE RISKS

Pace without challenge

Challenge without closure

05 Routine

06 Review signals

Basis: H01 / H04 | Original executive application

X38 Both-and tension map

ACTIVITY

Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

01 Tension

Decision pace and meaningful challenge.

PACE

02 Value of pace

Teams can act and avoid unnecessary waiting.

MEANINGFUL CHALLENGE

03 Value of challenge

Material evidence and consequences are examined before commitment.

04 / OVERUSE RISKS

Pace without challenge

Pace without challenge hides risk.

Challenge without closure

Challenge without closure creates delay and ambiguity.

05 Routine

Circulate the decision question, use a bounded concerns round and close with reasons, owner and conditions.

06 Review signals

Late surprise objections and repeated reopening indicate a need to revisit the routine.

Basis: H01 / H04 | Original executive application

X39

ACTIVITY

Event, interpretation and choice

Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.

Practical guide | Working form | Worked example

EXCEL TAB X39 Event interpretation and ch

TIME 45 minutes

BRING A modest, recent work event | A clear coaching boundary | A written alternative to personal disclosure

RUN THE ACTIVITY

01 Describe the event in observable terms, then ask what the coachee told themselves it meant. Keep interpretation separate from the event itself.

02 Explore the response that followed: action, avoidance or communication, and the consequence in work. Feelings may be named voluntarily without clinical analysis.

03 Examine evidence for and against the interpretation. The aim is not forced positivity but a more balanced account that can guide action.

QUESTIONS TO OPEN THINKING

What meaning did you add to the event?

What evidence supports a different account?

What action would remain useful even while you are uncertain?

CONTINUE THE METHOD

04 Generate two alternative interpretations and the actions each would make possible. Check for systemic conditions and legitimate concerns rather than assuming thinking is the only issue.

05 Choose a response consistent with evidence, values and role authority. Rehearse a brief opening or question in the actual work language the coachee uses.

06 Plan a low-risk test and a review of its consequences. Where the issue moves into significant distress or clinical needs, pause and use an appropriate qualified route.

BOUNDARY & CAUTION

This is a bounded cognitive-behavioural coaching adaptation, not treatment for a mental-health condition or an invitation to dispute a person's lived experience.

BETWEEN SESSIONS / HAND-OFF

Notice one event-interpretation-action sequence and practise the chosen checking question.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

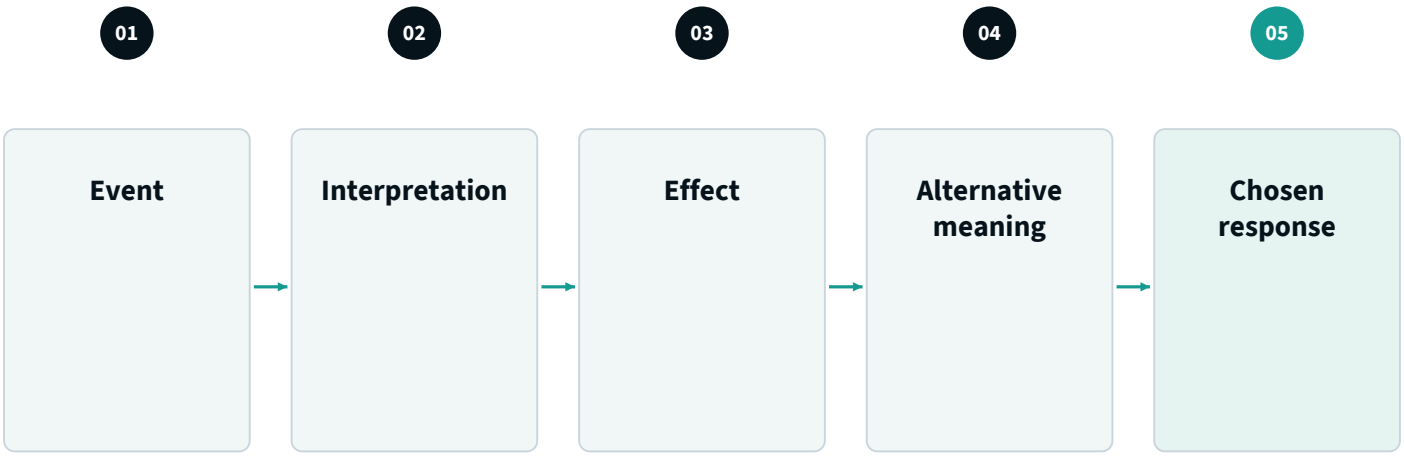
X39 Event, interpretation and choice

ACTIVITY

Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.

Guide **Worksheet** Example LIVE WORKSHEET

EVENT-INTERPRETATION-CHOICE ROUTE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 **Event**

02 **Interpretation**

03 **Response and consequence**

04 **Balanced account**

05 **Chosen response**

06 **Test and review**

Basis: H01 / H04 | Original executive application

X39 Event, interpretation and choice

ACTIVITY

Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.

EVENT-INTERPRETATION-CHOICE ROUTE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Event

A peer questioned M-07's recommendation in front of the sponsor.

02 Interpretation

They are trying to undermine my credibility.

03 Response and consequence

M-07 defended the recommendation quickly and the underlying evidence gap remained unclear.

04 Balanced account

The question may concern a genuine risk; intent is unknown and can be checked without surrendering authority.

05 Chosen response

Ask which evidence would change the recommendation, summarise the concern and decide within the agreed boundary.

06 Test and review

Use the response at a comparable discussion and review whether the risk became clearer and the decision remained owned.

Basis: H01 / H04 | Original executive application

X40

ACTIVITY

Distanced self-talk for a work decision

Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.

Practical guide | Working form | Worked example

EXCEL TAB X40 Distanced selftalk for a wo

TIME 25 minutes

BRING A current but manageable work dilemma | A private note | An option to decline or use ordinary written reflection

RUN THE ACTIVITY

01 Ask the coachee to describe the situation and what decision they face. Keep the exercise short and linked to a real work choice.

02 Invite them, if comfortable, to write advice to themselves using their name or you, as though addressing a respected colleague. Explain that this is a perspective experiment, not a cure.

03 Ask what the wiser adviser would notice about facts, uncertainty, values and the next practical step. Avoid replacing evidence with reassurance.

QUESTIONS TO OPEN THINKING

What would you advise a respected colleague facing these facts?

What does that adviser not know?

What is the next responsible action?

CONTINUE THE METHOD

04 Compare the distanced account with the initial self-talk. Identify what became clearer and what remained unresolved.

05 Choose one sentence or question that helps the coachee act responsibly under pressure. Rehearse it before a low-risk upcoming situation.

06 Review whether the exercise was useful for this person. Stop using it if it feels artificial, distancing in an unhelpful way or outside the coaching purpose.

BOUNDARY & CAUTION

Research on self-distancing is not evidence that this specific executive exercise will work universally. Do not use it to process trauma or replace qualified care.

BETWEEN SESSIONS / HAND-OFF

Try the prompt once before a demanding but manageable discussion and record whether it helped the decision.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R24 | Original executive application

X40 Distanced self-talk for a work decision

ACTIVITY

Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.

Guide **Worksheet** Example LIVE WORKSHEET

01 Situation

02 Initial self-talk

03 Distanced prompt

04 New perspective

05 Action sentence

06 Review

Basis: H01 / R24 | Original executive application

X40 Distanced self-talk for a work decision

ACTIVITY

Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

01 Situation

M-07 is worried that a difficult gate discussion will expose uncertainty.

02 Initial self-talk

I must have an answer to every challenge or I will lose credibility.

03 Distanced prompt

M-07, what would a responsible project director do with uncertainty that matters?

04 New perspective

Make the unknown explicit, use the specialists' authority and define the evidence needed for a decision.

05 Action sentence

I do not yet have that evidence; let us identify who can resolve it and what decision can safely be made now.

06 Review

After the meeting, assess whether this response supported clarity rather than simply reducing discomfort.

Basis: H01 / R24 | Original executive application

X41

ACTIVITY

Compassionate challenge after a setback

Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.

Practical guide | Working form | Worked example

EXCEL TAB X41 Compassionate challenge aft

TIME 35 minutes

BRING A manageable work setback | A private writing space | Permission to stop or keep the reflection practical

RUN THE ACTIVITY

01 Ask what happened and what the coachee is saying to themselves about it. Separate the event from a global judgement about their worth or competence.

02 Invite a short response in the voice of a fair, caring colleague: acknowledge the difficulty, avoid humiliation and stay honest about consequences.

03 Identify what the coachee is responsible for and what was outside their control. Compassion does not remove accountability or formal obligations.

QUESTIONS TO OPEN THINKING

What would a fair colleague say that is both kind and true?

What responsibility is yours?

What would repair look like to the person affected?

CONTINUE THE METHOD

04 Ask what can be repaired, learned or practised. Prioritise the affected person's needs rather than seeking reassurance that the executive is a good person.

05 Choose one repair or learning action and one realistic support. Rehearse a specific acknowledgement where appropriate.

06 Close with a practical review date and ask whether the activity was useful. Do not insist on an emotional breakthrough.

BOUNDARY & CAUTION

Keep the exercise optional and within competence. It is not psychotherapy, and it must not be used to minimise misconduct or pressure another person to reconcile.

BETWEEN SESSIONS / HAND-OFF

Complete the repair action where appropriate and bring evidence of what the other person actually needed.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R16 | Original executive application

X41 Compassionate challenge after a setback

ACTIVITY

Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.

01 Setback

02 Harsh judgement

03 Fair account

04 Responsibility

05 Repair action

06 Learning step

Basis: H01 / R16 | Original executive application

X41 Compassionate challenge after a setback

ACTIVITY

Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.

01 Setback

M-07 interrupted a specialist and closed discussion before a concern was understood.

02 Harsh judgement

I am incapable of leading this team well.

03 Fair account

This was an unhelpful behaviour in a pressured meeting, not a complete account of M-07's leadership.

04 Responsibility

Acknowledge the interruption and create a proper opportunity to hear the concern.

05 Repair action

Speak to the specialist, name the behaviour and ask what remains unresolved, without demanding forgiveness.

06 Learning step

Practise summarising a challenge before responding at the next meeting.

Basis: H01 / R16 | Original executive application

X42

ACTIVITY

Ambivalence conversation

Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.

Practical guide | Working form | Worked example

EXCEL TAB X42 Ambivalence conversation

TIME 45 minutes

BRING A behaviour the coachee is considering changing | Permission to explore uncertainty | No hidden sponsor requirement for a predetermined answer

RUN THE ACTIVITY

01 Ask what the coachee is considering and why the question matters now. Establish that the purpose is understanding, not persuading them to accept the coach's preferred action.

02 Explore what the current behaviour provides, including legitimate protection, efficiency or identity. Do not label every reason to stay as resistance.

03 Explore what concerns the coachee about continuing and what attracts them to a different practice. Reflect both sides accurately without stacking the argument.

QUESTIONS TO OPEN THINKING

What does the current approach do for you?

What concerns you about keeping it?

What, if anything, are you ready to try?

CONTINUE THE METHOD

04 Ask what would make change feasible and worthwhile. Distinguish importance from confidence and from the practical opportunity to act.

05 Invite the coachee to choose a next step, including further exploration, a small test or no change. Where an organisational requirement is mandatory, disclose it rather than presenting it as free choice.

06 Summarise their own reasons and chosen action. Review whether the conversation increased clarity and agency.

BOUNDARY & CAUTION

This activity is informed by motivational interviewing principles but does not confer MI competence. Never use it to covertly secure compliance with a sponsor's agenda.

BETWEEN SESSIONS / HAND-OFF

Write your own reasons for the experiment and the conditions under which you would revise it.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R11 / R21 | Original executive application

X42 Ambivalence conversation

ACTIVITY

Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.

Guide **Worksheet** Example LIVE WORKSHEET

AMBIVALENCE BALANCE MAP

Reasons to change

Reasons not to change

What matters most

A freely chosen next step

Explore the ambivalence without persuading the coachee towards a preselected answer.

01 Current practice

02 Reasons to keep it

03 Reasons to change

04 Conditions needed

05 Chosen next step

06 Review

Basis: H01 / R11 / R21 | Original executive application

X42 Ambivalence conversation

ACTIVITY

Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

AMBIVALENCE BALANCE MAP

Reasons to change

Reasons not to change

What matters most

A freely chosen next step

Explore the ambivalence without persuading the coachee towards a preselected answer.

01 Current practice

M-07 personally checks every major draft before circulation.

02 Reasons to keep it

Quality assurance feels dependable and surprises are less visible at the gate.

03 Reasons to change

The approach delays ownership and leaves little time for strategic preparation.

04 Conditions needed

Explicit evidence standards, reliable checkpoints and clear escalation authority.

05 Chosen next step

Test a bounded delegation on one recommendation, not abandon oversight entirely.

06 Review

Discuss whether the test protected quality and allowed another person to own the reasoning.

Basis: H01 / R11 / R21 | Original executive application

X43

ACTIVITY

Ladder of inference check

Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.

Practical guide | Working form | Worked example

EXCEL TAB X43 Ladder of inference check

TIME 40 minutes

BRING One interaction or decision | A simple sequence: observation, selection, meaning, assumption, conclusion, action | Relevant evidence

RUN THE ACTIVITY

01 Reconstruct the action the coachee took and work backwards to the conclusion that supported it. Do not begin by declaring the conclusion wrong.

02 Identify the observations selected from the event and what may have been left out. Ask how role, pressure or prior experience shaped attention.

03 Separate meanings and assumptions from directly observed information. Write each in its own line so the jump becomes visible.

QUESTIONS TO OPEN THINKING

What did you select from everything that happened?

Where did a meaning become a fact in your account?

What question could interrupt the jump?

CONTINUE THE METHOD

04 Explore a plausible alternative path using the same observations. The coach should include their own assumptions in the check rather than claim objectivity.

05 Choose a point at which the coachee could pause, seek evidence or ask a neutral question before acting.

06 Rehearse that question and plan a work application. Retain uncertainty where the other person's intention is not known.

BOUNDARY & CAUTION

The sequence is an explanatory aid, not a validated assessment of bias or proof of another person's motives.

BETWEEN SESSIONS / HAND-OFF

Use the checking question once and record whether new information changed the conclusion.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

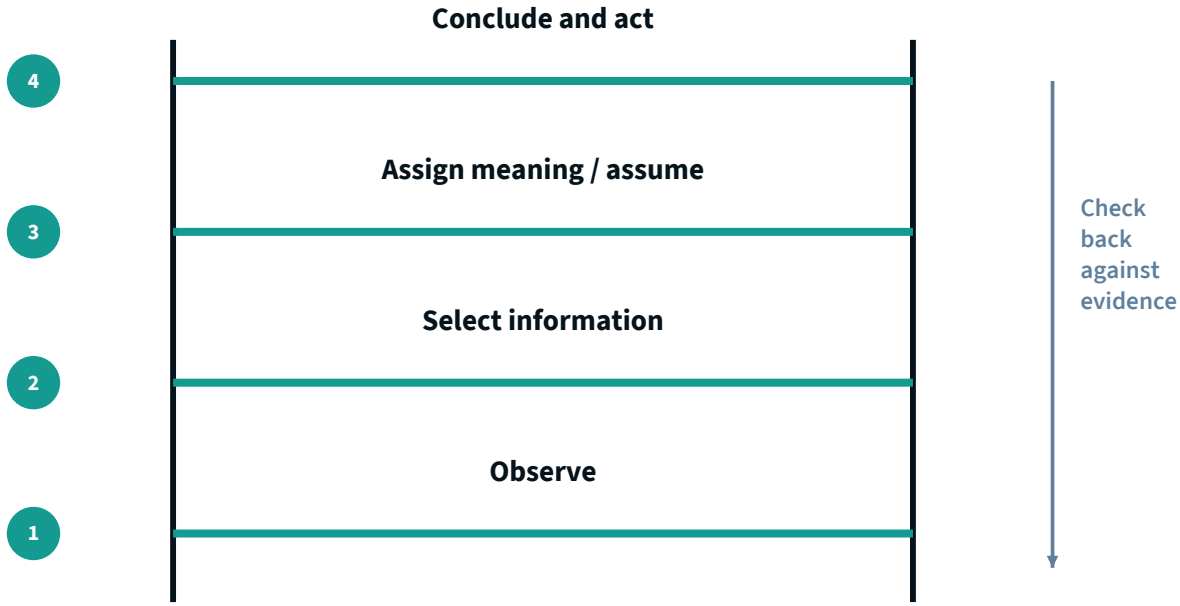
X43 Ladder of inference check

ACTIVITY

Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.

Guide **Worksheet** Example LIVE WORKSHEET

LADDER WITH EVIDENCE-CHECK RETURN



Climb the interpretation path, then return to observations and ask a checking question.

01 Observation

02 Selected information

03 Meaning and assumption

04 Conclusion and action

05 Alternative path

06 Checking question

Basis: H01 / H04 | Original executive application

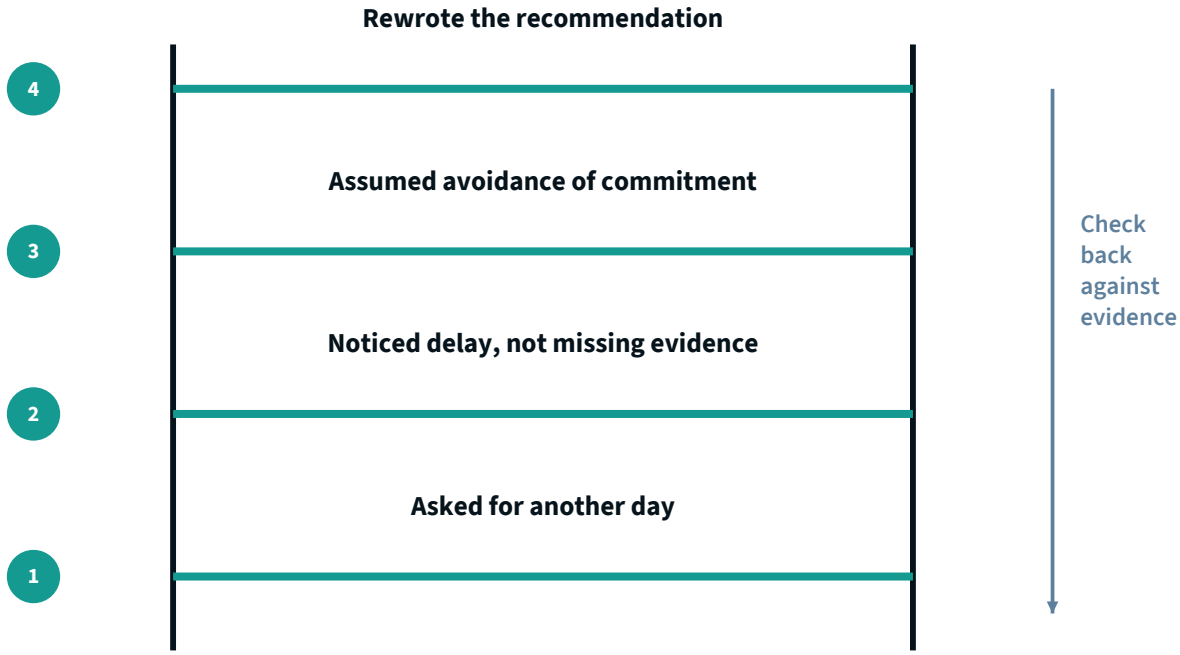
X43 Ladder of inference check

ACTIVITY

Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

LADDER WITH EVIDENCE-CHECK RETUPᴺ



Climb the interpretation path, then return to observations and ask a checking question.

01 Observation

The commercial lead asked for another day before endorsing the recommendation.

02 Selected information

M-07 focused on the delay and not the new cost assumption mentioned earlier.

03 Meaning and assumption

The lead is avoiding commitment and expects M-07 to decide alone.

04 Conclusion and action

M-07 escalated the issue as a lack of ownership.

05 Alternative path

The lead may need time to validate a material cost assumption within their responsibility.

06 Checking question

Which assumption needs checking, what decision could it change, and when can you provide the evidence?

Basis: H01 / H04 | Original executive application

X44

ACTIVITY

Competing commitments inquiry

Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.

Practical guide | Working form | Worked example

EXCEL TAB X44 Competing commitments inqui

TIME 60 minutes; experienced coach recommended

BRING A self-chosen development goal | A specific recurring behaviour | Consent to explore assumptions, with a right to stop

RUN THE ACTIVITY

01 Ask the coachee to choose a change they genuinely want, rather than a sponsor's unexamined demand. Describe it through observable work.

02 Identify actions or omissions that appear to work against the goal. Keep the account descriptive and avoid shame or a diagnosis of sabotage.

03 Explore what might be at risk if the person acted differently. Offer hypotheses lightly; the coachee decides whether a competing commitment fits.

CONTINUE THE METHOD

04 State the assumption connecting the feared consequence to the current behaviour. Ask where it may be true and where it may be overgeneralised.

05 Design a small, safe test of the assumption that does not require abandoning a legitimate responsibility or exposing private material.

06 Review what was learned and revise the hypothesis. The aim is greater choice, not proving that the person has a hidden psychological block.

QUESTIONS TO OPEN THINKING

What important concern might this behaviour be protecting?

What are you assuming would happen if you changed it?

What safe test could give us better evidence?

BOUNDARY & CAUTION

Do not force hidden-commitment interpretations, personal disclosure or unsafe tests. This is a bounded educational adaptation, not the licensed full method or clinical treatment.

BETWEEN SESSIONS / HAND-OFF

Choose whether the hypothesis fits. Test only a small assumption that can be examined safely and ethically.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R14 | Original executive application

X44 Competing commitments inquiry

ACTIVITY

Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.

Guide **Worksheet** Example LIVE WORKSHEET

01 Stated goal

02 Counter-behaviour

03 Possible competing commitment

04 Assumption

Test the assumption; do not diagnose the person.

05 Safe test

06 Learning criterion

Basis: H01 / H04 / R14 | Original executive application

X44 Competing commitments inquiry

ACTIVITY

Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

01 Stated goal

M-07 wants specialists to retain more ownership of recommendations.

02 Counter-behaviour

M-07 rewrites drafts before the agreed checkpoint.

03 Possible competing commitment

Avoid being seen as the director who allowed a material gap to reach the sponsor.

04 Assumption

If I do not personally inspect every detail, serious problems will go unnoticed and I will be blamed.

Test the assumption; do not diagnose the person.

05 Safe test

On one routine recommendation, use agreed assurance criteria and a checkpoint instead of continuous rewriting.

06 Learning criterion

Check whether material gaps were identified through the agreed process and whether ownership remained clear.

Basis: H01 / H04 / R14 | Original executive application

X45

ACTIVITY

Courage through graded rehearsal

Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.

Practical guide | Working form | Worked example

EXCEL TAB X45 Courage through graded rehe

TIME 45 minutes plus short rehearsals

BRING A specific behaviour such as raising a risk | A low-risk practice opportunity | Clear operational and interpersonal boundaries

RUN THE ACTIVITY

01 Define the behaviour and why it matters. Ask what makes it difficult without assuming the person has a confidence deficit.

02 Break the task into progressively more demanding but safe steps, such as writing an opening, practising with the coach and using it in a routine meeting.

03 Let the coachee choose the first step and define what successful practice means. Avoid forcing exposure to hostile, discriminatory or unsafe situations.

QUESTIONS TO OPEN THINKING

What is the smallest useful version of this behaviour?

What support makes it safe enough to try?

What did practice show that confidence alone could not?

CONTINUE THE METHOD

04 Rehearse the step, pause and give specific feedback on the behaviour. Repeat with one adjustment rather than many corrections.

05 Agree a real application, support and a stop or escalation condition. The coachee does not need to feel entirely comfortable before a legitimate action.

06 Review evidence of practice and learning separately from feelings of confidence. Progress may include deciding that a system response is needed.

BOUNDARY & CAUTION

This is work-skill rehearsal, not exposure therapy. Do not use it for clinical anxiety, trauma or unsafe workplace conditions.

BETWEEN SESSIONS / HAND-OFF

Complete the agreed first real-world step and record the behaviour, response and learning.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

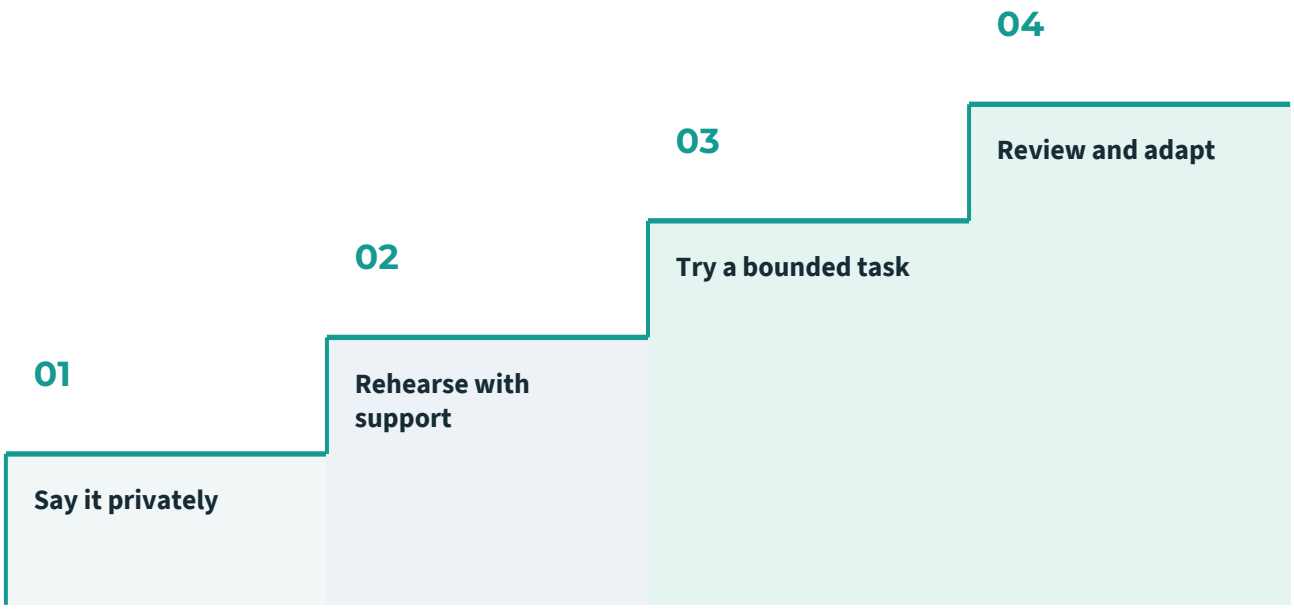
X45 Courage through graded rehearsal

ACTIVITY

Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.

Guide **Worksheet** Example LIVE WORKSHEET

GRADED-REHEARSAL STAIRCASE



Agree the sequence, permission and support. A higher step is not an automatic competence claim.

01 Target behaviour

02 Practice ladder

03 First step

04 Feedback

05 Support and boundary

06 Review

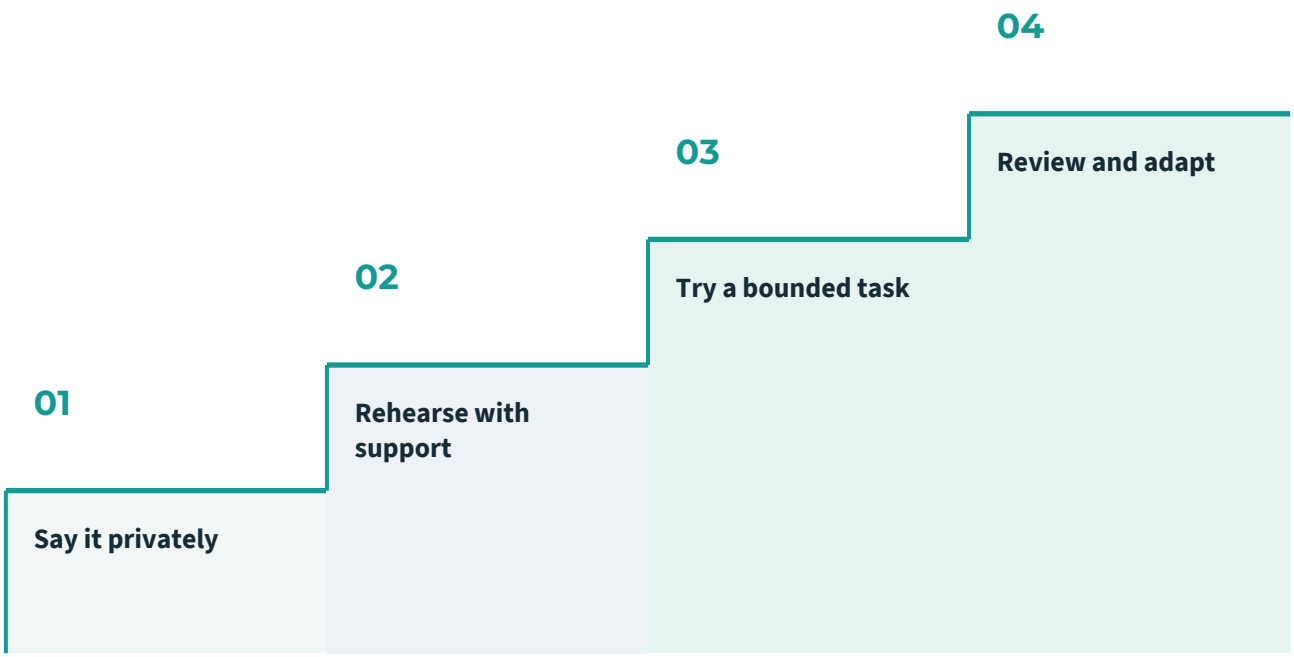
Basis: H01 / H04 | Original executive application

X45 Courage through graded rehearsal

ACTIVITY

Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.

GRADED-REHEARSAL STAIRCASE



Agree the sequence, permission and support. A higher step is not an automatic competence claim.

01 Target behaviour

Raise a material evidence gap before a gate recommendation is endorsed.

02 Practice ladder

Write the question; rehearse with the coach; use it in a routine review; then apply it at the formal gate.

03 First step

Practise a 30-second statement naming the gap and the decision it could affect.

04 Feedback

The first attempt sounded accusatory; the revised version asks for evidence and clarifies responsibility.

05 Support and boundary

Engineering lead confirms the issue is appropriate to raise; urgent safety concerns use formal escalation.

06 Review

Record whether the question was asked, understood and acted on, not merely whether M-07 felt confident.

Basis: H01 / H04 | Original executive application

X46

ACTIVITY

Difficult conversation rehearsal

Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.

Practical guide | Working form | Worked example

EXCEL TAB X46 Difficult conversation rehe

TIME 60 minutes

BRING A real conversation within the coachee's authority | Relevant facts and desired outcome | A role-play agreement and pause signal

RUN THE ACTIVITY

01 Clarify the purpose, relationship and non-negotiable requirements. Separate a coaching conversation from a formal disciplinary, grievance or legal process.

02 Prepare a short opening using observable facts, impact and a genuine question. Avoid rehearsing an accusation about intent.

03 Ask the coachee to play themselves while the coach gives a plausible, not caricatured response. Pause after the opening to examine clarity and tone.

CONTINUE THE METHOD

04 Rehearse listening and summarising before responding. Introduce one realistic disagreement, then practise acknowledging it without abandoning legitimate boundaries.

05 Close with a concrete agreement, disagreement or next process step, including owner and time. Do not force consensus or an apology.

06 Debrief what worked, what felt artificial and what needs proper specialist preparation. Agree a follow-up after the real conversation.

QUESTIONS TO OPEN THINKING

What must be clear by the end?

What might the other person reasonably see differently?

How will you know whether an agreement was actually made?

BOUNDARY & CAUTION

Do not coach someone to manipulate, threaten or bypass formal employment procedures. Obtain appropriate advice for consequential or legally sensitive conversations.

BETWEEN SESSIONS / HAND-OFF

Hold the conversation when properly prepared; afterwards use X67 to review what actually happened.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R12 / R15 | Original executive application

X46 Difficult conversation rehearsal

ACTIVITY

Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.

Guide Worksheet Example LIVE WORKSHEET

01 Conversation

02 Opening

03 Likely response

04 Listening response

05 Boundary and agreement

06 Follow-up

Basis: H01 / R12 / R15 | Original executive application

X46 Difficult conversation rehearsal

ACTIVITY

Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.

01 Conversation

M-07 needs to discuss repeated late evidence with a commercial peer.

02 Opening

The last two cost updates arrived after the preparation deadline, which limited the review. What is getting in the way?

03 Likely response

The peer says the deadline ignores supplier response times.

04 Listening response

You are saying the current deadline is not controllable because a supplier input arrives later. Which part can we change together?

05 Boundary and agreement

Mandatory cost assumptions must be visible before endorsement; agree an early provisional update and a named exception route.

06 Follow-up

Review the next cycle and adjust the process if the supplier dependency remains.

Basis: H01 / R12 / R15 | Original executive application

X47

ACTIVITY

Negotiation interests and boundaries

Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.

Practical guide | Working form | Worked example

EXCEL TAB X47 Negotiation interests and b

TIME 55 minutes

BRING A genuine negotiation | Known authority and constraints | Evidence about options and dependencies

RUN THE ACTIVITY

01 Define the issue and the decision each party can make. Identify where the coachee lacks authority and must obtain approval before negotiating.

02 Separate stated positions from underlying interests, including the other party's possible interests as hypotheses to check. Do not assume you know their motives.

03 Identify feasible alternatives if agreement is not reached and the costs of delay. Avoid bluffing or inventing an alternative to create pressure.

QUESTIONS TO OPEN THINKING

What matters beneath each stated position?

What can you actually agree today?

What is your legitimate alternative if no agreement is reached?

CONTINUE THE METHOD

04 Generate options that could meet more than one interest. Test them against mandatory requirements, fairness and operational feasibility.

05 Rehearse questions, a clear proposal and a respectful boundary. Practise what the coachee will do if the discussion becomes coercive or unsafe.

06 Record agreement terms, outstanding approvals and review arrangements. A friendly conversation is not the same as an authorised agreement.

BOUNDARY & CAUTION

Negotiation preparation is not legal or procurement advice. Do not encourage deception, discriminatory leverage or commitments beyond authority.

BETWEEN SESSIONS / HAND-OFF

Check one assumed interest with the other party and update the proposal before negotiating.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R15 | Original executive application

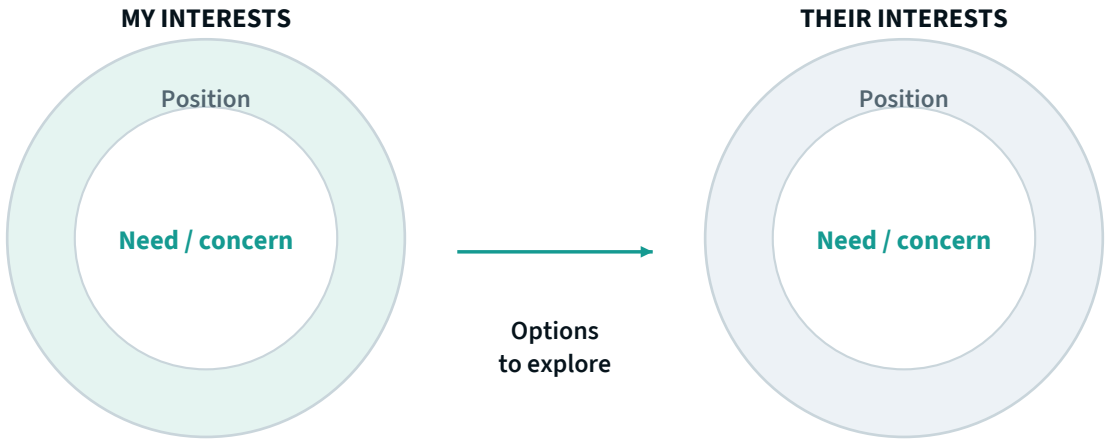
X47 Negotiation interests and boundaries

ACTIVITY

Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.

Guide **Worksheet** Example LIVE WORKSHEET

NEGOTIATION INTERESTS MAP



BOUNDARIES / AUTHORITY / A WORKABLE AGREEMENT

Distinguish stated positions from interests; verify the other person's account rather than assuming it.

01 Issue

02 M-07's interests

03 Other interests to check

04 Authority and limits

05 Proposal and alternative

06 Agreement record

Basis: H01 / R15 | Original executive application

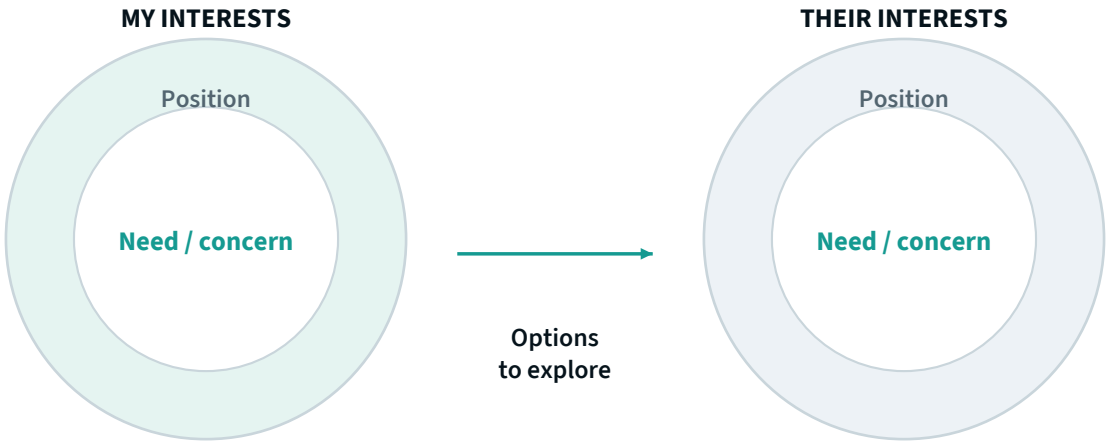
X47 Negotiation interests and boundaries

ACTIVITY

Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

NEGOTIATION INTERESTS MAP



BOUNDARIES / AUTHORITY / A WORKABLE AGREEMENT

Distinguish stated positions from interests; verify the other person's account rather than assuming it.

01 Issue

Agree an earlier provisional cost update without overloading the commercial team.

02 M-07's interests

A usable gate brief and visible uncertainty before endorsement.

03 Other interests to check

Commercial accuracy, supplier dependencies and avoiding repeated rework.

04 Authority and limits

M-07 can agree a process trial, not change contractual supplier obligations.

05 Proposal and alternative

Trial a provisional update with explicit assumptions; if infeasible, escalate the dependency with joint evidence.

06 Agreement record

One-cycle trial, named owners, minimum content and a review before making it standard.

Basis: H01 / R15 | Original executive application

X48

ACTIVITY

Conflict response choice

Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.

Practical guide | Working form | Worked example

EXCEL TAB X48 Conflict response choice

TIME 45 minutes

BRING One current disagreement | An authorised Conflict Response Assessment only if relevant | A clear account of stakes, time and relationship

RUN THE ACTIVITY

01 Describe the disagreement, what matters to each party and any non-negotiable requirements. Distinguish a legitimate difference from misconduct or a safety issue.

02 Identify the coachee's usual response in this situation and its actual consequences. An assessment profile may offer language, but it does not determine the right response.

03 Generate alternatives such as direct assertion, collaborative exploration, a temporary pause or a bounded compromise. Discuss what each protects and risks here.

QUESTIONS TO OPEN THINKING

What is the disagreement really about?

What does your usual response protect, and what does it cost?

What would make a different response appropriate here?

CONTINUE THE METHOD

04 Choose a response based on stakes, time, authority and the other party's ability to participate. Avoid treating collaboration as mandatory in every circumstance.

05 Rehearse the opening and the point at which the executive would pause, escalate or change approach.

06 Review the actual interaction later, including whether the chosen response respected both the task and the people affected.

BOUNDARY & CAUTION

Do not use conflict styles to label colleagues or require reconciliation in cases of harm. Formal and specialist routes remain available.

BETWEEN SESSIONS / HAND-OFF

Try the agreed response in an appropriate situation and collect evidence of its effect, not just whether conflict reduced.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H05 | Original executive application

X48 Conflict response choice

ACTIVITY

Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.

Guide **Worksheet** Example LIVE WORKSHEET

CONFLICT-RESPONSE CHOICE MAP

○ Pause and clarify

○ Ask and listen

○ State a boundary

○ Use a formal route

Choose for this situation, with power, safety and purpose in view. This is not a fixed conflict type.

01 Disagreement

02 Usual response

03 Cost

04 Alternative

05 Opening

06 Review

Basis: H01 / H05 | Original executive application

X48 Conflict response choice

ACTIVITY

Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

CONFLICT-RESPONSE CHOICE MAP

- ○ **Pause and clarify**
- ○ **Ask and listen**
- ○ **State a boundary**
- ○ **Use a formal route**

Choose for this situation, with power, safety and purpose in view. This is not a fixed conflict type.

01 Disagreement

Engineering and commercial leads differ on whether evidence is sufficient for a conditional decision.

02 Usual response

M-07 tries to settle the issue quickly by proposing a compromise.

03 Cost

The compromise may obscure a mandatory technical requirement that is not negotiable.

04 Alternative

Clarify the non-negotiable assurance, then explore options for the remaining commercial uncertainty.

05 Opening

Which part is a required standard, and which part is a judgement we can make within conditions?

06 Review

Check whether the disagreement produced a clearer decision rather than merely a quieter meeting.

Basis: H01 / H05 | Original executive application

X49

ACTIVITY

SBI feedback rehearsal

Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.

Practical guide | Working form | Worked example

EXCEL TAB X49 SBI feedback rehearsal

TIME 40 minutes

BRING A recent, relevant work episode | Permission and an appropriate setting | A desired developmental or operational purpose

RUN THE ACTIVITY

01 Choose an episode that the coachee directly observed. Clarify whether feedback is the right response or whether a formal process is needed.

02 Write a precise situation, the observable behaviour and its impact on the work or on the speaker. Avoid global labels, mind-reading and statements presented as everyone's view.

03 Read the feedback aloud and remove unnecessary judgement. Own the perspective and distinguish actual consequences from feared ones.

CONTINUE THE METHOD

04 Add an inquiry about the other person's view or intention. Practise listening to an explanation without automatically withdrawing the impact statement.

05 Agree a useful next conversation or action, without prescribing a solution before understanding the context.

06 Rehearse a second version and decide when to use it. Review whether the feedback was understood and what changed afterwards.

QUESTIONS TO OPEN THINKING

What did you directly see or hear?

What impact can you honestly own?

What do you need to understand from the other person?

BOUNDARY & CAUTION

Feedback must not be a disguised attack or an invented consensus. Do not use a coaching rehearsal to bypass formal duties or specialist procedures.

BETWEEN SESSIONS / HAND-OFF

Use the feedback when appropriate and ask the recipient what they understood, without demanding agreement.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R12 | Original executive application

X49 SBI feedback rehearsal

ACTIVITY

Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.

Guide **Worksheet** Example LIVE WORKSHEET

S B I

01 Situation

02 Behaviour

03 Impact

04 Inquiry

05 Next step

06 Rehearsal learning

Basis: H01 / R12 | Original executive application

X49 SBI feedback rehearsal

ACTIVITY

Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

S B I

01 Situation

At Tuesday's gate review, during the discussion of the cost assumption.

02 Behaviour

The recommendation was endorsed before the commercial lead finished explaining the unresolved input.

03 Impact

I left unclear whether the assumption had been accepted or still needed checking.

04 Inquiry

What was your understanding of the decision at that point?

05 Next step

Agree how unresolved assumptions will be stated before endorsement at the next review.

06 Rehearsal learning

Replace you always rush with the specific sequence and its consequence.

Basis: H01 / R12 | Original executive application

X50

ACTIVITY

Ask for feedforward

Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.

Practical guide | Working form | Worked example

EXCEL TAB X50 Ask for feedforward

TIME 30 minutes preparation/debrief; 10 minutes per conversation

BRING One self-chosen behavioural goal | Two trusted contributors | A request that does not create pressure to praise

RUN THE ACTIVITY

01 Define the future behaviour in specific work terms. Avoid asking how to be a better leader in general.

02 Choose contributors who understand the work and can offer relevant suggestions. Explain that participation is optional and not a request to rate the person.

03 Rehearse a short request: I am working on this behaviour; what one or two actions might help in this situation?

CONTINUE THE METHOD

04 Listen, clarify and record suggestions without arguing each one. The coachee may thank the person without promising to follow all advice.

05 Compare suggestions with the goal, authority, values and context. Select one idea to test and explain why others are not being used now.

06 Agree a small work experiment and a follow-up. Do not turn the exercise into a popularity contest or evidence of a guaranteed improvement.

QUESTIONS TO OPEN THINKING

What exact future behaviour are you asking about?

Which suggestion fits the work and your authority?

How will you test it rather than simply collect advice?

BOUNDARY & CAUTION

Future suggestions complement rather than replace necessary feedback about actual harm, performance or required standards.

BETWEEN SESSIONS / HAND-OFF

Make the agreed requests, select one suggestion and bring a record of the experiment, not just the advice received.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R13 | Original executive application

X50 Ask for feedforward

ACTIVITY

Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.

Guide **Worksheet** Example LIVE WORKSHEET

FEEDFORWARD LISTENING ROUTE

01 **Ask for future ideas**

02 **Listen without defending**

03 **Choose what to try**

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

Use consented, proportionate notes. Do not promise anonymity that the setting cannot support.

01 **Goal**

02 **Contributors**

03 **Request**

04 **Suggestions**

05 **Choice**

06 **Follow-up**

Basis: H01 / R13 | Original executive application

X50 Ask for feedforward

ACTIVITY

Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.

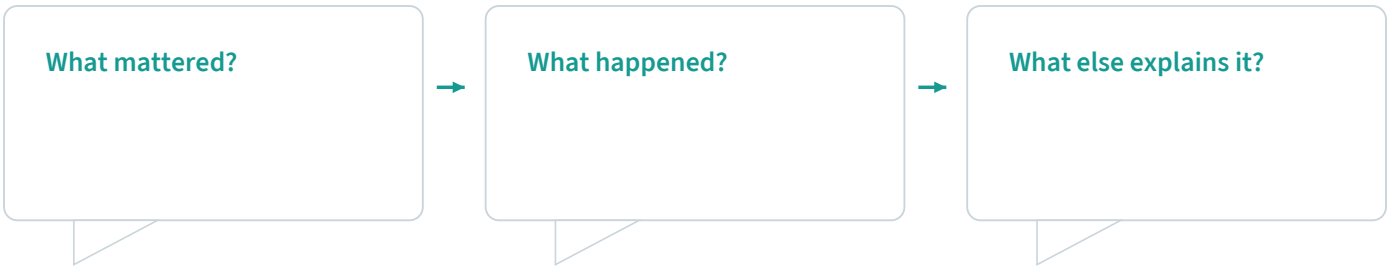
Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

FEEDFORWARD LISTENING ROUTE

01 **Ask for future ideas**

02 **Listen without defending**

03 **Choose what to try**



WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

Use consented, proportionate notes. Do not promise anonymity that the setting cannot support.

01 Goal

Invite useful challenge before stating a gate recommendation.

02 Contributors

A commercial peer and a delivery coordinator, both participating voluntarily.

03 Request

What one or two actions would help people raise a concern early in the review?

04 Suggestions

Circulate the decision question and ask each function what could change the recommendation.

05 Choice

M-07 will test the question-first brief and a short concerns round.

06 Follow-up

After one gate, ask whether the opportunity to contribute was clearer; no rating of personal worth is requested.

Basis: H01 / R13 | Original executive application

X51

ACTIVITY

Boundary-setting and saying no

Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.

Practical guide | Working form | Worked example

EXCEL TAB X51 Boundarysetting and saying

TIME 45 minutes

BRING A request the coachee needs to accept, modify or decline | Actual authority and capacity | A realistic alternative if one exists

RUN THE ACTIVITY

01 Clarify the request, its legitimate purpose and the coachee's responsibility. Do not assume that every uncomfortable request should be declined.

02 Identify the constraint: authority, capacity, priority, quality or ethics. Check that it is real and not an untested assumption.

03 Prepare a response that acknowledges the purpose, states the boundary and explains the relevant trade-off briefly. Avoid long excuses or invented commitments.

QUESTIONS TO OPEN THINKING

What are you responsible for saying yes to?

Which constraint needs to be stated clearly?

What decision should the requester or sponsor own?

CONTINUE THE METHOD

04 Offer an alternative only where it is feasible and within authority. The alternative might be a different date, reduced scope or a sponsor decision about priorities.

05 Rehearse a persistent response from the requester and practise maintaining the boundary without escalating hostility.

06 Record the decision and any consequences requiring follow-up. Review whether the boundary protected the work without simply transferring burden to another person.

BOUNDARY & CAUTION

Do not use boundary language to evade duties, deny reasonable access or disregard an urgent safety obligation. Seek appropriate advice when obligations are unclear.

BETWEEN SESSIONS / HAND-OFF

Use the response in a legitimate situation and record the trade-off that was actually agreed.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 | Original executive application

X51 Boundary-setting and saying no

ACTIVITY

Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.

BOUNDARY-SETTING RESPONSE STRIP

1	2	3	4
Acknowledge purpose	**State the boundary**	**Offer an alternative**	**Confirm the next owner**

Respectful does not mean vague. Clear does not mean dismissive.

Rehearse an actual sentence and listen to its likely effect; retain non-negotiable duties.

01 Request

02 Constraint

03 Response

04 Alternative

05 Persistent challenge

06 Follow-up

Basis: H01 | Original executive application

X51 Boundary-setting and saying no

ACTIVITY

Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.

BOUNDARY-SETTING RESPONSE STRIP

1	2	3	4
Acknowledge purpose	**State the boundary**	**Offer an alternative**	**Confirm the next owner**

Respectful does not mean vague. Clear does not mean dismissive.

Rehearse an actual sentence and listen to its likely effect; retain non-negotiable duties.

01 Request

Add a new analysis to tomorrow's gate pack without changing existing commitments.

02 Constraint

The team cannot complete the analysis and the mandatory assurance checks to a proper standard in the available time.

03 Response

We can complete the assurance checks for tomorrow. The new analysis needs another day or a decision to defer a lower-priority item.

04 Alternative

Provide a bounded preliminary view labelled as incomplete, only if the decision owner accepts its limitations.

05 Persistent challenge

M-07 repeats the quality and capacity trade-off rather than promising that the team will somehow manage.

06 Follow-up

Record the sponsor's priority decision and check that no colleague inherits an unacknowledged overload.

Basis: H01 | Original executive application

X52

ACTIVITY

Ethical dilemma rehearsal

Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.

Practical guide | Working form | Worked example

EXCEL TAB X52 Ethical dilemma rehearsal

TIME 60 minutes

BRING A fictionalised or safely bounded dilemma | Applicable policies and professional duties | A qualified advice route

RUN THE ACTIVITY

01 Describe the dilemma without unnecessary identifying information. Distinguish known facts, allegations, uncertainty and immediate risk.

02 Identify affected people, including those with little voice, and the duties attached to the executive's role. The coach must not assume legal or professional authority they do not hold.

03 Explore feasible options and likely consequences. Test each against mandatory requirements, dignity, fairness, confidentiality and the possibility of harm.

QUESTIONS TO OPEN THINKING

Who is affected but not represented?

What duty cannot be traded away?

Who is qualified to advise on the part we cannot settle here?

CONTINUE THE METHOD

04 Ask what advice or evidence is needed and who is qualified to provide it. Do not let the desire for a quick coaching answer replace a formal process.

05 Rehearse the next responsible action: pausing a decision, seeking advice, documenting a concern or communicating a boundary.

06 Record the reasoning, advice route and review point. Keep sensitive details outside routine coaching records where required.

BOUNDARY & CAUTION

This is ethical reflection, not legal advice or an investigation. Immediate risk and formal reporting duties take priority over completing the worksheet.

BETWEEN SESSIONS / HAND-OFF

Identify the actual advice route before using the rehearsal in a live consequential situation.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R01 | Original executive application

X52 Ethical dilemma rehearsal

ACTIVITY

Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.

Guide **Worksheet** Example LIVE WORKSHEET

ETHICAL-DILEMMA LENS MAP

1 **Whose interests?**

2 **What duties / limits?**

3 **What consequences?**

4 **Who has authority?**

Do not use reflection to bypass a required formal decision.

Work within competence and authority; identify the qualified route when the issue exceeds coaching.

01 **Dilemma**

02 **Facts and uncertainty**

03 **Affected interests**

04 **Boundary**

05 **Next action**

06 **Review**

Basis: H01 / H04 / R01 | Original executive application

X52 Ethical dilemma rehearsal

ACTIVITY

Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

ETHICAL-DILEMMA LENS MAP

1 **Whose interests?**

2 **What duties / limits?**

3 **What consequences?**

4 **Who has authority?**

Do not use reflection to bypass a required formal decision.

Work within competence and authority; identify the qualified route when the issue exceeds coaching.

01 Dilemma

A sponsor asks M-07 to omit an unresolved condition from a gate summary to avoid concern.

02 Facts and uncertainty

The condition is material; the sponsor's intended meaning and decision authority need clarification.

03 Affected interests

Delivery team, technical owners, investment governance and people relying on the decision.

04 Boundary

The record must not misrepresent the evidence or conceal a mandatory condition.

05 Next action

Ask for clarification, retain the condition and seek the appropriate governance or ethics advice if pressure continues.

06 Review

Document the authorised decision and ensure the team understands what has and has not been approved.

Basis: H01 / H04 / R01 | Original executive application

X53

ACTIVITY

Metaphor as a thinking aid

Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.

Practical guide | Working form | Worked example

EXCEL TAB X53 Metaphor as a thinking aid

TIME 35 minutes

BRING A current work challenge | Permission to use imagery or a plain-language alternative | Paper or a verbal description

RUN THE ACTIVITY

01 Ask whether a metaphor or image would help the coachee think about the situation. Offer a plain-language route and do not insist on creativity.

02 Invite the coachee to describe their own image, such as a traffic controller or a bridge. Ask what each element means to them rather than interpreting it.

03 Explore what the image helps them notice and what it leaves out. A metaphor is selective and may oversimplify relationships or authority.

QUESTIONS TO OPEN THINKING

What does that image mean to you?

What does it hide or oversimplify?

What would the change look like in an actual meeting?

CONTINUE THE METHOD

04 Ask what small change to the image would represent a useful change in work. Translate the change back into an observable behaviour or process.

05 Check that the proposed action fits actual evidence and responsibilities. Do not make a major decision solely because a metaphor feels powerful.

06 Capture the practical insight and an experiment, then set the image aside if it stops helping.

BOUNDARY & CAUTION

Do not interpret drawings or metaphors as diagnostic evidence, hidden trauma or unconscious truth. The coachee controls meaning and disclosure.

BETWEEN SESSIONS / HAND-OFF

Use the practical action once; keep the metaphor only if it continues to clarify the work.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X53 Metaphor as a thinking aid

ACTIVITY

Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.

Guide **Worksheet** Example LIVE WORKSHEET

METAPHOR DRAWING AND INQUIRY SPACE

Draw or describe your image here.

TEST THE IMAGE

What does it reveal?

What does it miss?

What changes in work?

Retained example: air-traffic controller. Use the coachee's own metaphor, not an imposed interpretation.

01 Image

02 Meaning

03 What it reveals

04 What it misses

05 Practical alternative

06 Experiment

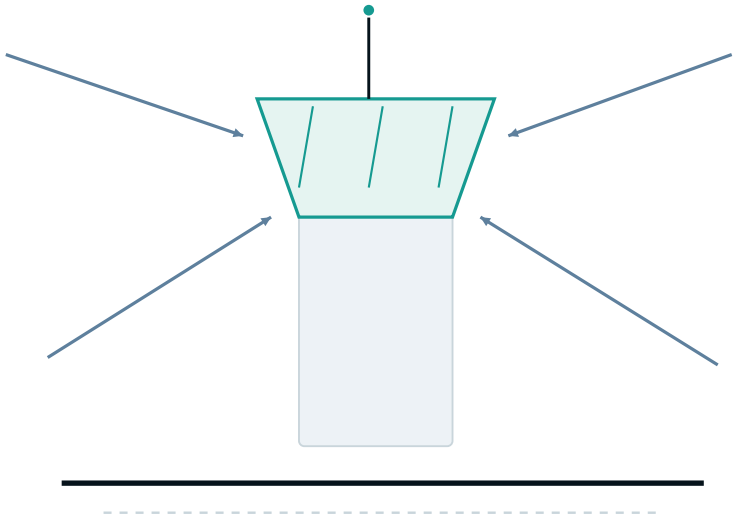
Basis: H01 / H04 | Original executive application

X53 Metaphor as a thinking aid

ACTIVITY

Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.

METAPHOR DRAWING AND INQUIRY SPACE



Every decision waits for central permission.

TEST THE IMAGE

What does it reveal?

What does it miss?

What changes in work?

Retained example: air-traffic controller. Use the coachee's own metaphor, not an imposed interpretation.

01 Image

M-07 describes being an air-traffic controller for every project decision.

02 Meaning

All requests wait for their permission and the role feels overloaded.

03 What it reveals

The executive is a bottleneck in routine decisions as well as material trade-offs.

04 What it misses

Specialists already hold authority for several decisions and do not need central permission.

05 Practical alternative

Create explicit decision boundaries and escalation criteria rather than trying to control every route.

06 Experiment

Delegate one routine recommendation and review whether it moved without unnecessary waiting.

Basis: H01 / H04 | Original executive application

X54

ACTIVITY

Future leadership identity in practice

Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.

Practical guide | Working form | Worked example

EXCEL TAB X54 Future leadership identity

TIME 50 minutes

BRING Role mandate | A desired future contribution | Evidence of current strengths and constraints

RUN THE ACTIVITY

01 Ask how the coachee wants to be experienced in their role and why that matters. Distinguish personal aspiration from an image they feel pressured to perform.

02 Translate the desired description into three observable practices. For example, a thoughtful integrator asks for different evidence and makes the trade-off explicit.

03 Find current episodes that already show part of the desired practice. Preserve continuity rather than suggesting the person must become someone entirely different.

QUESTIONS TO OPEN THINKING

Whose ideal are you trying to meet?

What would this description look like in a decision?

What part of it is already present?

CONTINUE THE METHOD

04 Identify a tension between the aspiration and a current habit, including what the habit protects. Explore system conditions that support or obstruct the desired behaviour.

05 Choose one small identity-consistent action for the next fortnight. Define a boundary and feedback source so the exercise remains grounded in work.

06 Review action and impact rather than asking whether the coachee has become their ideal self. Allow the aspiration to evolve as the role changes.

BOUNDARY & CAUTION

Do not impose a culturally narrow executive ideal or require the coachee to suppress identity, values or legitimate emotion to appear credible.

BETWEEN SESSIONS / HAND-OFF

Practise the one chosen behaviour and ask a trusted colleague what they actually experienced.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R21 | Original executive application

X54 Future leadership identity in practice

ACTIVITY

Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.

Guide **Worksheet** Example LIVE WORKSHEET

LEADERSHIP IDENTITY IN ACTION

01

Current habit

02

Chosen behaviour

03

Future-role contribution

NOW NEXT USEFUL SIGNAL FUTURE

Make the story observable and workable, not an idealised promise.

01 Desired description

02 Observable practices

03 Existing evidence

04 Habit in tension

05 Small action

06 Review

Basis: H01 / H04 / R21 | Original executive application

X54 Future leadership identity in practice

ACTIVITY

Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.

LEADERSHIP IDENTITY IN ACTION

01

Current habit

What I repeat

→

02

Chosen behaviour

What I will practise

→

03

Future-role contribution

What others will notice

NOW — NEXT USEFUL SIGNAL — FUTURE

Make the story observable and workable, not an idealised promise.

01 Desired description

A project director who integrates evidence and helps others own good decisions.

02 Observable practices

Ask for options first, make the trade-off explicit and close with an accountable owner.

03 Existing evidence

M-07 used this approach successfully in a recent cross-functional handover.

04 Habit in tension

Under deadline pressure, M-07 rewrites the recommendation before hearing the specialist's reasoning.

05 Small action

At the next checkpoint, ask for the specialist's recommendation and evidence before offering a view.

06 Review

Check whether ownership and decision quality improved, rather than whether M-07 felt like a different person.

Basis: H01 / H04 / R21 | Original executive application

THE 6A WORKPLACE COACHING SYSTEM

05

Apply

Learning must survive contact with work

THE GATE

Is behaviour changing in work?

MINIMUM OUTPUT

Experiments + transfer plan

24 TOOLS & ACTIVITIES

Open the stage tool directory >

Apply: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T51	Workplace experiment canvas	415	416	417
T52	Implementation intention	418	419	420
T53	Stakeholder support agreement	421	422	423
T54	Manager transfer conversation	424	425	426
T55	After-action review	427	428	429
T56	Habit and environment design	430	431	432
T57	Relapse and pressure plan	433	434	435
T58	90-day transfer plan	436	437	438
T59	Learning journal	439	440	441
T60	Closure and sustainment plan	442	443	444
X55	Fourteen-day delegation experiment	445	446	447
X56	A new decision-meeting routine	448	449	450

BEFORE YOU MOVE ON

Is behaviour changing in work? Complete or revisit: Experiments + transfer plan.

Apply: tools to use

Directory 2 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
X57	Strategic calendar sprint	451	452	453
X58	Stakeholder listening tour	454	455	456
X59	Reciprocal network development	457	458	459
X60	Habit cues and friction	460	461	462
X61	WOOP work experiment	463	464	465
X62	Role-crafting proposal	466	467	468
X63	Confidence through work evidence	469	470	471
X64	Targeted behavioural feedback pulse	472	473	474
X65	Prospective decision journal	475	476	477
X66	Learning-partner check-in	478	479	480
X67	After-action review of a difficult conversation	481	482	483
X68	Setback and restart plan	484	485	486

BEFORE YOU MOVE ON

Is behaviour changing in work? Complete or revisit: Experiments + transfer plan.

Learning must survive contact with work

Apply turns an insight into a bounded attempt in actual work. The executive needs opportunity, permission, resources and feedback, not merely intention. A useful experiment may show that a behaviour helps, that it needs adaptation or that a system barrier remains. This is learning, not a secret performance test. [H01, H04]

Design a small, informative experiment

Name the behaviour and situation, predict what may happen and define evidence. Choose a scale that is safe and feasible. Keep formal technical and employment requirements intact. Agree the experiment with affected colleagues where their participation or workload is involved.

Specify support and boundaries

Describe who can authorise the work, what the executive may decide and when intervention is required. Delegation does not mean never intervening. A practice that depends on unavailable information or capacity needs a system action as well as a coaching plan.

Use cues and routines carefully

If-then plans and reminders can help make a small action easier to repeat. They do not guarantee a habit in a fixed number of days. Track appropriate opportunities and attempts, and distinguish repetition from usefulness. Retain legitimate exceptions.

Seek targeted feedback

Ask what was observed, what difference it made and what could improve. Use consent and an honest privacy rule. A narrow pulse can support learning without repeating an entire assessment. Missing observations and contrary feedback belong in the record.

Treat setbacks as information

Explore relevance, workload, opportunity, capability and the action's design before interpreting non-completion. Simplify, redesign, defer or stop where appropriate. An executive should not persist with an unsuitable practice to please the coach.

Review action, result and explanation separately

What did the coachee do? What happened? What might explain it? The ebook's Madar case shows why these are different questions. Update the formulation and choose the next step. A successful conversation can reveal an operational barrier that needs another owner.

APPLY / OPERATING ROUTE

Choose the next useful move.

These routes are practical suggestions, not a requirement to complete every tool.

01

Design the trial

T51, T52, T53, X55, X56 / Experiment, transfer and support

02

Make practice feasible

X57, X60, X61 / Time, cues and if-then plans

03

Work through relationships

X58, X59, X66 / Listening, reciprocity and learning partners

04

Gather evidence

T54, T55, X64, X65 / Observation, feedback and decisions

05

Learn and restart

T56-T60, X67, X68 / Review, adaptation and sustained practice

GATE REVIEW

Is behaviour changing in work? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

BASIS H01-H04 | Route selection is an original editorial aid

T51

TOOL

Workplace experiment canvas

Test a target behaviour in a real and bounded work situation.

Practical guide | Working form | Worked example

EXCEL TAB T51 Workplace experiment canvas

TIME 30-45 minutes; specialist approval for material risk | OWNER Coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Write a testable hypothesis linking behaviour to a plausible work effect.

02 Choose a representative situation with enough opportunity and manageable stakes.

03 Specify the behaviour precisely enough for the coachee to perform.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Writing a hypothesis too vague to learn from one experiment; Testing new behaviour in a live decision with unmanaged operational risk; Collecting evidence about activity while ignoring the intended behavioural effect.

CONTINUE THE METHOD

04 Set safety boundaries, permissions, stop conditions and affected-party protection.

05 Define light-touch evidence, run once and review what to retain or change.

BOUNDARY & CAUTION

Do not run a workplace experiment whose failure could create unmanaged safety, legal, employment or material project harm.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.207

T51 Workplace experiment canvas

TOOL

Test a target behaviour in a real and bounded work situation.

Hypothesis If I do X, Y may happen because...

Situation Where and with whom

Behaviour Small specific action

Safety Limits and contingency

Evidence What will be noticed

Feedback Who/what will inform learning

Result What happened

Next iteration Repeat, adapt or stop

Basis: H01 / H04 | H04 source p.207

T51 Workplace experiment canvas

TOOL

Test a target behaviour in a real and bounded work situation.

Retained fictional source extract; unpopulated fields are identified.

Hypothesis If I do X, Y may happen because...

Stating criteria before preferences will increase constructive challenge without extending meetings materially.

Situation Where and with whom

The next monthly investment gate for the Eastern Substation Renewal package.

Behaviour Small specific action

State decision owner and criteria, invite two alternatives, then ask for disconfirming evidence.

Safety Limits and contingency

No live safety decision, procurement confidentiality or delegated authority will be bypassed.

Evidence What will be noticed

Observer checklist, meeting duration and whether material rework is requested after the gate.

Feedback Who/what will inform learning

Not populated in the original worked extract.

Result What happened

Not populated in the original worked extract.

Next iteration Repeat, adapt or stop

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.207

T52

TOOL

Implementation intention

Convert intent into an if-then cue and response.

Practical guide | Working form | Worked example

EXCEL TAB T52 Implementation intention

TIME 15-25 minutes; review after three cue events | OWNER Coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Choose one meaningful goal and a recurring situation where action matters.

02 Define an observable 'if' cue that appears before the decision point.

03 Write one feasible 'then' response under the coachee's control.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using an internal feeling instead of a reliably observable cue; Specifying a response too complex to perform under pressure; Documenting friction without changing the environment or available support.

CONTINUE THE METHOD

04 Remove environmental friction and arrange proportionate support or reminders.

05 Track three cue events, then simplify or strengthen the intention from evidence.

BOUNDARY & CAUTION

An implementation intention cannot overcome a missing authority, opportunity or resource that makes the response impossible.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.210

T52 Implementation intention

TOOL

Convert intent into an if-then cue and response.

Guide **Worksheet** Example LIVE WORKSHEET

Goal Desired behaviour

IF

If cue Specific time, place, signal or event

THEN

Then response Observable action

Friction Likely barrier

Support Environment or person

Tracking Simple evidence

Recovery What to do after a miss

Basis: H01 / H04 | H04 source p.210

T52 Implementation intention

TOOL

Convert intent into an if-then cue and response.

Retained fictional source extract; unpopulated fields are identified.

Goal Desired behaviour

Use the full decision-framing routine in three consecutive capital-project gates.

IF

If cue Specific time, place, signal or event

If the sponsor states a preferred option before alternatives have been tested,

THEN

Then response Observable action

then I will restate criteria and invite one supported counter-option before proceeding.

Friction Likely barrier

The agenda is crowded and previous gate templates begin with a recommendation.

Support Environment or person

Programme office will place criteria and alternatives before recommendation in the template.

Tracking Simple evidence

Not populated in the original worked extract.

Recovery What to do after a miss

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.210

T53

TOOL

Stakeholder support agreement

Mobilise opportunity and feedback without sharing private coaching content.

Practical guide | Working form | Worked example

EXCEL TAB T53 Stakeholder support agreeme

TIME 30-45 minutes jointly; re-contract after role change | OWNER Coachee + stakeholder

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Translate the coaching goal into support relevant to the stakeholder's role.

02 Identify a real work opportunity with authority, timing and manageable risk.

03 Agree enabling support that preserves coachee ownership of the behaviour.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Turning stakeholder support into observation, reporting or surveillance; Allowing the supporter to solve the goal on the coachee's behalf; Leaving information boundaries implicit until the first feedback conversation.

CONTINUE THE METHOD

04 Define observable feedback and when it will be offered privately.

05 Set information boundaries, record commitments and review after the opportunity.

BOUNDARY & CAUTION

Do not turn stakeholder support into surveillance, compelled disclosure or control of the coachee's choices.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.213

T53

TOOL

Stakeholder support agreement

Mobilise opportunity and feedback without sharing private coaching content.

Practical guide | Working form | Worked example

EXCEL TAB T53 Stakeholder support agreeme

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Goal area High-level agreed outcome	
Opportunity Work assignment or decision exposure	
Support Resource, cover or access	
Feedback Observable behaviour and cadence	
Boundary What remains private	
Review Date and evidence	

T53

TOOL

Stakeholder support agreement

Mobilise opportunity and feedback without sharing private coaching content.

Practical guide | Working form | Worked example

EXCEL TAB T53 Stakeholder support agreeme

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal area High-level agreed outcome	Lead higher-quality investment decisions through explicit criteria, alternatives and respectful challenge.
Opportunity Work assignment or decision exposure	Chair the next three package gates and one cross-portfolio risk escalation.
Support Resource, cover or access	Sponsor will preserve chair authority and avoid announcing a preference before evidence review.
Feedback Observable behaviour and cadence	Peer observer provides private behaviour feedback within 24 hours using five agreed indicators.
Boundary What remains private	No session content, coach notes or personal assessment data will be shared.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T54

TOOL

Manager transfer conversation

Enable the manager to support application within contracted boundaries.

Practical guide | Working form | Worked example

EXCEL TAB T54 Manager transfer conversati

TIME 30-45 minutes at goal, midpoint and transfer review | OWNER Manager + coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Agree the work outcome and behaviour the coachee wants to transfer.

02 Select an authentic opportunity with sufficient authority, time and relevance.

03 Specify manager actions that create opportunity without coaching the solution.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Inviting the manager to ask for private coaching content; Offering a work opportunity without the authority or time to practise; Repurposing developmental evidence for an undisclosed employment assessment.

CONTINUE THE METHOD

04 Choose behavioural evidence both parties may discuss at review.

05 Restate confidentiality and employment-use boundaries before confirming the next check-in.

BOUNDARY & CAUTION

Do not combine this transfer conversation with performance adjudication or requests for private coaching content.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.216

T54

TOOL

Manager transfer conversation

Enable the manager to support application within contracted boundaries.

Practical guide | Working form | Worked example

EXCEL TAB T54 Manager transfer conversati

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Desired outcome What the coachee chooses to share	
Work opportunity Where behaviour can be practised	
Manager support Feedback, authority, resources and obstacles	
Evidence What both may notice	
Boundary Session content remains private	
Follow-up Date and adjustment	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T54

TOOL

Manager transfer conversation

Enable the manager to support application within contracted boundaries.

Practical guide | Working form | Worked example

EXCEL TAB T54 Manager transfer conversati

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Desired outcome What the coachee chooses to share	Apply decision framing consistently while strengthening cross-functional trust during project gates.
Work opportunity Where behaviour can be practised	Lead the Riverside Depot investment gate and subsequent commercial lessons review.
Manager support Feedback, authority, resources and obstacles	Protect preparation time, clarify decision rights and model openness to contrary evidence.
Evidence What both may notice	Coachee reflection, agreed observer behaviours and post-gate rework logged by programme office.
Boundary Session content remains private	Manager receives progress and support requests, never coaching dialogue or private hypotheses.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T55

TOOL

After-action review

Learn quickly from a workplace experiment or event.

Practical guide | Working form | Worked example

EXCEL TAB T55 Afteraction review

TIME 20-30 minutes, preferably within 48 hours | OWNER Coachee/team

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Restate the intent and expected conditions before examining what happened.

02 Describe actual actions and results using evidence rather than judgment.

03 Compare intent with actual and isolate the most consequential difference.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Using the review to allocate blame for an imperfect result; Judging the original decision only with information learned afterwards; Capturing lessons without changing the next behaviour, condition or support.

CONTINUE THE METHOD

04 Identify what helped, hindered and sat outside participants' control.

05 Carry one lesson into the next action, support or environmental change.

BOUNDARY & CAUTION

Use the organisation's incident or investigation process, not an after-action review, where accountability or evidence preservation is formal.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.219

T55

TOOL

After-action review

Learn quickly from a workplace experiment or event.

Practical guide | Working form | Worked example

EXCEL TAB T55 Afteraction review

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Intent What was meant to happen	
Actual What happened	
Difference Why	
Helpful What to repeat	
Unhelpful What to adapt	
Learning New insight	
Next Specific iteration	

T55

TOOL

After-action review

Learn quickly from a workplace experiment or event.

Practical guide | Working form | Worked example

EXCEL TAB T55 Afteraction review

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Intent What was meant to happen	Surface alternatives before recommendation and secure clear ownership of the investment decision.
Actual What happened	Criteria were stated, but dissent was invited only after the sponsor backed one option.
Difference Why	Challenge came too late to influence framing, although ownership was documented correctly.
Helpful What to repeat	An advance agenda and peer observer made the new routine easier to remember.
Unhelpful What to adapt	A late cost paper compressed discussion and triggered my habit of accelerating closure.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T56

TOOL

Habit and environment design

Make new behaviour easier to repeat under pressure.

Practical guide | Working form | Worked example

EXCEL TAB T56 Habit and environment desig

TIME 30-45 minutes; test for two to four weeks | OWNER Coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Define a small behaviour that matters in a recurring work moment.

02 Choose a cue that occurs early enough to prompt the behaviour.

03 Reshape the physical, digital or social environment to make action easier.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Relying on motivation while leaving the old environment unchanged; Selecting a cue that occurs after the target behaviour is needed; Choosing a reward that encourages speed rather than decision quality.

CONTINUE THE METHOD

04 Increase friction around the old response without creating new risk.

05 Select an immediate meaningful reward and review repetition, not perfection.

BOUNDARY & CAUTION

Habit design cannot resolve a structural barrier, unsafe workload or missing decision right that needs organisational action.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.222

T56 Habit and environment design

TOOL

Make new behaviour easier to repeat under pressure.

Guide **Worksheet** Example LIVE WORKSHEET

Cue Reliable trigger

Behaviour Tiny repeatable action

Reward Immediate meaningful reinforcement

Environment Make desired behaviour easy

Friction Make old pattern harder

Social support Who notices or joins

Tracking Light-touch evidence

Basis: H01 / H04 | H04 source p.222

T56 Habit and environment design

TOOL

Make new behaviour easier to repeat under pressure.

Retained fictional source extract; unpopulated fields are identified.

Cue Reliable trigger

The chair states decision criteria or someone first names a preferred option.

→

Behaviour Tiny repeatable action

Invite a supported contrary view before summarising any preferred capital-project option.

→

Reward Immediate meaningful reinforcement

Record whether the challenge improved assumptions, then acknowledge the contributor before closing.

Environment Make desired behaviour easy

Gate template contains a visible 'alternatives and dissenting evidence' section before recommendation.

Friction Make old pattern harder

Prepare one neutral challenge question and reserve five agenda minutes for competing evidence.

Social support Who notices or joins

Not populated in the original worked extract.

Tracking Light-touch evidence

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.222

T57

TOOL

Relapse and pressure plan

Protect new behaviour when workload or emotion rises.

Practical guide | Working form | Worked example

EXCEL TAB T57 Relapse and pressure plan

TIME 30-45 minutes before closure or predictable pressure | OWNER Coach + coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Identify the pressure context most likely to disrupt the new behaviour.

02 Name the earliest observable sign of drift or avoidance.

03 Set a minimum viable behaviour that preserves the goal under pressure.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Defining an early sign that is visible only after relapse; Making the minimum behaviour as demanding as the full routine; Treating a lapse as failure instead of using the agreed reset.

CONTINUE THE METHOD

04 Agree a brief reset sequence for use after any lapse.

05 Confirm consented support, escalation limits and a post-event learning review.

BOUNDARY & CAUTION

This plan is not a crisis, safeguarding or clinical response; activate the qualified route when those thresholds are met.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.225

T57

TOOL

Relapse and pressure plan

Protect new behaviour when workload or emotion rises.

Practical guide | Working form | Worked example

EXCEL TAB T57 Relapse and pressure plan

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Risk context When old pattern is likely	
Early sign Cue that pressure is taking over	
Minimum behaviour Small version to preserve	
Reset Action after lapse	
Support Person/resource	
Learning stance How lapse becomes data	
Review When to revisit	

T57

TOOL

Relapse and pressure plan

Protect new behaviour when workload or emotion rises.

Practical guide | Working form | Worked example

EXCEL TAB T57 Relapse and pressure plan

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Risk context When old pattern is likely	Urgent cost escalation with an impatient sponsor and incomplete commercial evidence.
Early sign Cue that pressure is taking over	I begin summarising before alternatives or affected functions have been heard.
Minimum behaviour Small version to preserve	Name the decision owner, state known uncertainty and invite one contrary evidence point.
Reset Action after lapse	Pause, acknowledge premature closure and reopen the relevant criterion for two minutes.
Support Person/resource	Programme director may request a process pause without discussing private coaching content.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T58

TOOL

90-day transfer plan

Sequence application, feedback and consolidation beyond sessions.

Practical guide | Working form | Worked example

EXCEL TAB T58 90day transfer plan

TIME 45-60 minutes plus brief monthly reviews | OWNER Coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Translate the coaching goal into a sequenced 90-day transfer outcome.

02 Use days 1-30 to establish cues, early practice and baseline evidence.

03 Use days 31-60 to vary contexts and address recurring barriers.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Listing coaching activities rather than observable transfer milestones; Front-loading every change into days 1-30 without testing capacity; Naming support without confirming the supporter, boundary or availability.

CONTINUE THE METHOD

04 Use days 61-90 to sustain, delegate or embed the behaviour.

05 Attach balanced measures, named support and scheduled review points to each phase.

BOUNDARY & CAUTION

Treat the phases as a review scaffold, not a rigid schedule when role, risk or opportunity changes materially.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.228

T58 90-day transfer plan

TOOL

Sequence application, feedback and consolidation beyond sessions.

Guide **Worksheet** Example LIVE WORKSHEET

30 60 90

DAYS 01-30 DAYS 31-60 DAYS 61-90

Days 1-30 Experiments and quick feedback

Days 31-60 Broader application and barrier removal

Days 61-90 Consolidation, stakeholder evidence and independence

Measures Behaviour and work evidence

Support Manager, peer and resources

Risks Triggers and mitigations

Review Dates and owner

Basis: H01 / H04 | H04 source p.228

T58 90-day transfer plan

TOOL

Sequence application, feedback and consolidation beyond sessions.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

30 60 90

DAYS 01-30 DAYS 31-60 DAYS 61-90

Days 1-30 Experiments and quick feedback

Use the routine twice, gather peer feedback and remove recommendation-first agenda wording.

Days 31-60 Broader application and barrier removal

Apply across three workstreams and coach one deputy to facilitate structured dissent.

Days 61-90 Consolidation, stakeholder evidence and independence

Sustain unaided use, review exceptions and agree the team's permanent gate standard.

Measures Behaviour and work evidence

Routine use, challenge quality, decision clarity and avoidable post-gate rework trend.

Support Manager, peer and resources

Sponsor protects authority; peer observes monthly; programme office supplies aggregate rework data.

Risks Triggers and mitigations

Not populated in the original worked extract.

Review Dates and owner

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.228

T59

TOOL

Learning journal

Capture evidence and reflection without storing unnecessary sensitive detail.

Practical guide | Working form | Worked example

EXCEL TAB T59 Learning journal

TIME 10-15 minutes per entry; monthly pattern review | OWNER Coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Capture a specific situation soon enough to preserve accurate detail.

02 Describe the chosen action and observable result without retrospective polish.

03 Explore meaning, emotion and an alternative interpretation proportionately.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Recording events without examining meaning, alternatives or recurring patterns; Using reflection to rationalise the result rather than test assumptions; Storing unnecessary names, allegations or sensitive project information.

CONTINUE THE METHOD

04 Compare entries to identify contextual patterns and exceptions.

05 Select one learning question or experiment and remove unnecessary sensitive detail.

BOUNDARY & CAUTION

A learning journal must remain optional and private unless specific access and use have been freely agreed.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.231

T59

TOOL

Learning journal

Capture evidence and reflection without storing unnecessary sensitive detail.

Practical guide | Working form | Worked example

EXCEL TAB T59 Learning journal

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Situation Relevant work moment	
Action What I did	
Result What happened	
Meaning What I learned	
Pattern What this connects to	
Next What I will test	
Privacy Where the journal is kept	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T59

TOOL

Learning journal

Capture evidence and reflection without storing unnecessary sensitive detail.

Practical guide | Working form | Worked example

EXCEL TAB T59 Learning journal

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Situation Relevant work moment	Riverside Depot gate opened with sponsor support for the lowest-cost contractor.
Action What I did	I restated criteria, invited delivery and safety alternatives, then tested the leading assumption.
Result What happened	The board retained the option but added a mobilisation condition before approval.
Meaning What I learned	Constructive challenge can strengthen a preferred option without creating unnecessary opposition.
Pattern What this connects to	I challenge more confidently when criteria are visible and the invitation is time-bounded.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T60

TOOL

Closure and sustainment plan

End the engagement deliberately and preserve autonomy.

Practical guide | Working form | Worked example

EXCEL TAB T60 Closure and sustainment pla

TIME 45-60 minutes plus a 90-day follow-up | OWNER Coach + coachee

BRING Chosen insight, behaviour and critical moment | Available opportunity, feedback and support | Risk and confidentiality boundaries

RUN THE ACTIVITY

01 Review the original goal against evidence, context and any revised meaning.

02 Name capabilities the coachee can now use without coach dependence.

03 Separate unfinished development from issues needing another qualified route.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Treating the final session as celebration without testing sustainment; Creating indefinite coach dependence instead of transferring self-management; Listing warning signs without a reset action or support owner.

CONTINUE THE METHOD

04 Agree proportionate support and boundaries for the sustainment period.

05 Define warning signs, resets, follow-up date and secure record closure.

BOUNDARY & CAUTION

Do not close coaching while an unresolved safety, ethical, complaint or continuity issue still requires accountable action.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.234

T60

TOOL

Closure and sustainment plan

End the engagement deliberately and preserve autonomy.

Practical guide | Working form | Worked example

EXCEL TAB T60 Closure and sustainment pla

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Goal review Progress and evidence	
Capabilities What the coachee can now do	
Unfinished work What remains and who owns it	
Support Ongoing relationships and resources	
Warning signs When further help may be needed	
Boundary Post-engagement contact	
Closure Sponsor review and records	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T60

TOOL

Closure and sustainment plan

End the engagement deliberately and preserve autonomy.

Practical guide | Working form | Worked example

EXCEL TAB T60 Closure and sustainment pla

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal review Progress and evidence	Three consecutive gates used the routine; decision ownership and challenge both improved.
Capabilities What the coachee can now do	Decision framing, neutral inquiry, respectful dissent and concise synthesis under pressure.
Unfinished work What remains and who owns it	Delegate facilitation consistently and test transfer during an urgent commercial escalation.
Support Ongoing relationships and resources	Manager maintains decision-right clarity; peer check-in occurs monthly for the next quarter.
Warning signs When further help may be needed	Recommendation-first agendas, sponsor pre-emption or two gates without recorded alternative evidence.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

X55

ACTIVITY

Fourteen-day delegation experiment

Test a clearer delegation agreement in real work, then review ownership, quality and the reasons for any intervention.

Practical guide | Working form | Worked example

EXCEL TAB X55 Fourteenday delegation expe

TIME 35 minutes setup; two weeks application; 30-minute review

BRING One appropriate task | Colleague's agreement and task-specific capability | Authority, quality and escalation boundaries

RUN THE ACTIVITY

01 Choose a task with enough significance to teach something but no unmitigated safety or authorisation risk. Agree the experiment with the colleague, not merely about them.

02 Specify the outcome, authority, quality criteria, resources, deadline and checkpoint. Ask the colleague to explain the agreement back and identify missing support.

03 Predict what may change and what could still obstruct the work. Define when the executive should intervene, so success does not mean never helping.

CONTINUE THE METHOD

04 Run the task while recording brief observations of support, ownership and any take-back. Do not covertly monitor the colleague or use the experiment as an unannounced appraisal.

05 At the checkpoint, ask for options and reasoning before supplying an answer. Give required instruction openly where capability or authority demands it.

06 Review the output and the relationship together. Retain, adapt or stop the practice based on evidence, including system barriers that coaching did not remove.

QUESTIONS TO OPEN THINKING

What exactly can the colleague decide?

What would justify your intervention?

What did the experiment show about the agreement rather than the person?

BOUNDARY & CAUTION

Do not transfer accountability without authority or use high-risk tasks for unsupervised experimentation. Formal competence requirements remain unchanged.

BETWEEN SESSIONS / HAND-OFF

Run only the agreed task, retain minimal evidence and bring both the useful and unhelpful effects to review.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X55 Fourteen-day delegation experiment

ACTIVITY

Test a clearer delegation agreement in real work, then review ownership, quality and the reasons for any intervention.

Guide **Worksheet** Example LIVE WORKSHEET

FOURTEEN-DAY EXPERIMENT TRACKER

FOURTEEN-DAY EXPERIMENT

Week 1	1	2	3	4	5	6	7
Week 2	8	9	10	11	12	13	14

Use short notes or N/O (no relevant opportunity). This is not an attendance score.

Write the prediction first; retain permissions, checkpoints and escalation throughout the trial.

01 Task and permission

02 Agreement

03 Prediction

04 Observed practice

05 Result and limits

06 Next decision

Basis: H01 / H04 | Original executive application

X55 Fourteen-day delegation experiment

ACTIVITY

Test a clearer delegation agreement in real work, then review ownership, quality and the reasons for any intervention.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

FOURTEEN-DAY EXPERIMENT TRACKER

FOURTEEN-DAY EXPERIMENT

Week 1	1	2	3	4	5	6	7
Week 2	8	9	10	11	12	13	14

Agreement + checkpoint **Review evidence + decide**

Write the prediction first; retain permissions, checkpoints and escalation throughout the trial.

01 Task and permission

A specialist agrees to prepare the next integrated recommendation within their authorised scope.

02 Agreement

Outcome, evidence standard, available data, two-day checkpoint and escalation conditions are written and understood.

03 Prediction

Clearer checkpoints will reduce avoidable rewriting while keeping material gaps visible.

04 Observed practice

M-07 asks for the specialist's options before offering an opinion; one late supplier input is escalated appropriately.

05 Result and limits

Ownership remains clearer, but the supplier delay persists; the trial does not prove that delegation alone improves delivery time.

06 Next decision

Retain the agreement format and address the supplier dependency through procurement.

Basis: H01 / H04 | Original executive application

X56

ACTIVITY

A new decision-meeting routine

Test a meeting sequence that connects the decision question, challenge, reasoning and ownership without adding unnecessary ceremony.

Practical guide | Working form | Worked example

EXCEL TAB X56 A new decisionmeeting routi

TIME 30 minutes design; one or two meetings; 30-minute review

BRING One meeting within the executive's authority | A decision brief | Consent for any observation or feedback

RUN THE ACTIVITY

01 Choose a meeting with a clear decision purpose and explain the small process trial to participants. Do not impose a new routine on a meeting you do not own.

02 Prepare a concise brief with the question, options, criteria, known gaps and decision authority. Separate information updates from items requiring a decision.

03 Open by checking the question and inviting concerns before the executive states a preference. Use a bounded round without requiring everyone to disclose a view publicly.

QUESTIONS TO OPEN THINKING

What decision are we actually making?

What evidence could change the recommendation?

Who now owns what, under which conditions?

CONTINUE THE METHOD

04 Summarise the evidence and trade-off, then make or route the decision within authority. Record dissent or conditions accurately rather than declaring consensus from silence.

05 Close with the owner, due date, conditions and a check of understanding. Agree how unresolved questions will be handled.

06 Review usefulness, burden and unintended effects with participants. A shorter meeting is not necessarily a better decision.

BOUNDARY & CAUTION

Do not treat participation counts or apparent agreement as decision quality. Preserve required technical review and formal decision rights.

BETWEEN SESSIONS / HAND-OFF

Use the routine, keep the decision record and ask two precise questions about clarity and opportunity to contribute.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X56 A new decision-meeting routine

ACTIVITY

Test a meeting sequence that connects the decision question, challenge, reasoning and ownership without adding unnecessary ceremony.

Guide **Worksheet** Example LIVE WORKSHEET

DECISION-MEETING SEQUENCE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Meeting

02 New sequence

03 Preparation

04 Observation

05 Feedback

06 Next version

Basis: H01 / H04 | Original executive application

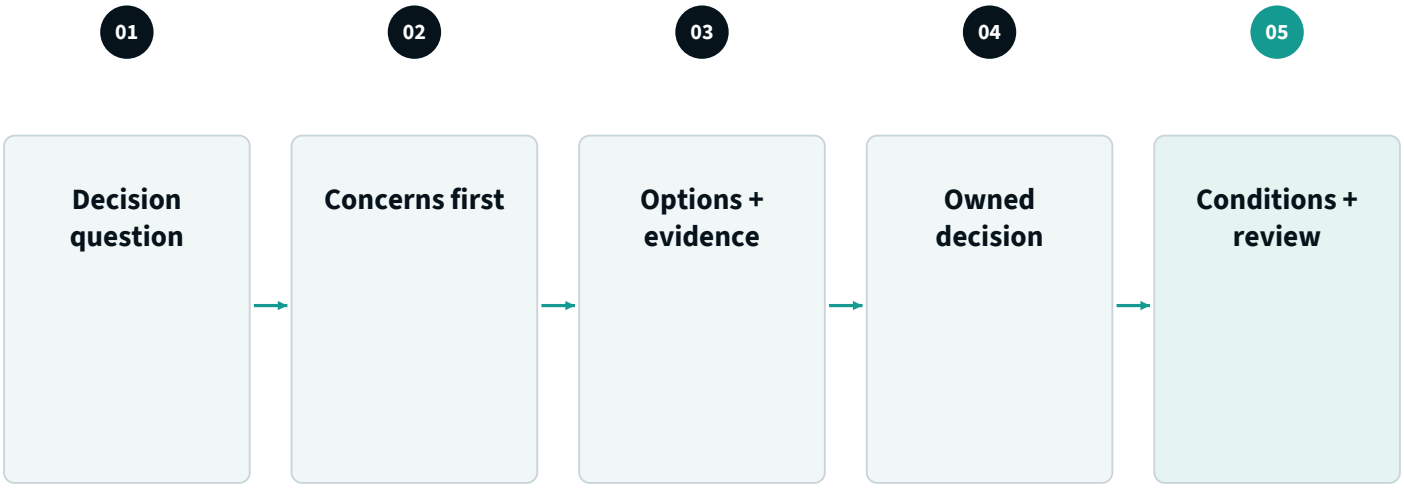
X56 A new decision-meeting routine

ACTIVITY

Test a meeting sequence that connects the decision question, challenge, reasoning and ownership without adding unnecessary ceremony.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

DECISION-MEETING SEQUENCE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Meeting

MetroLink East's next capital-gate review.

02 New sequence

Question first, concerns before preference, explicit trade-off, then owner and conditions.

03 Preparation

A two-page brief circulates two days beforehand with missing evidence labelled.

04 Observation

One concern changes a condition of approval; a separate scope question goes to the sponsor.

05 Feedback

Participants say the question was clearer; one asks for a written route to raise concerns before the meeting.

06 Next version

Retain the sequence and add the written route, then test it at one further review.

Basis: H01 / H04 | Original executive application

X57

ACTIVITY

Strategic calendar sprint

Protect a small amount of time for an agreed executive contribution and test whether it produces useful work rather than simply a fuller diary.

Practical guide | Working form | Worked example

EXCEL TAB X57 Strategic calendar sprint

TIME 30 minutes setup; two weeks; 25-minute review

BRING Calendar audit X20 | One priority contribution | Agreement about displaced work

RUN THE ACTIVITY

01 Choose a contribution that matters within the next fortnight, such as preparing a decision or developing a colleague. Define the tangible work it should produce.

02 Locate realistic calendar space and identify what will stop, shrink or move. Obtain agreement from affected people rather than silently transferring work.

03 Design an interruption rule, including a legitimate urgent-exception route. Do not use protected time as a reason to ignore safety or essential responsibilities.

QUESTIONS TO OPEN THINKING

What useful work should this time produce?

What will make room for it?

Which interruption is genuinely an exception?

CONTINUE THE METHOD

04 Use the time for the chosen contribution and record whether it was actually available. Distinguish booked time from time used.

05 Review the quality of the output and effects on colleagues. A completed time block without useful work is not the intended outcome.

06 Adjust the duration, timing or work design and retain only what helps. Treat repeated interruption as potential evidence of a system issue.

BOUNDARY & CAUTION

No ideal executive time percentage is implied. Do not equate calendar discipline with personal virtue or ignore unrealistic organisational demand.

BETWEEN SESSIONS / HAND-OFF

Complete the sprint and compare booked time, used time, output quality and burden on others.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 | Original executive application

X57 Strategic calendar sprint

ACTIVITY

Protect a small amount of time for an agreed executive contribution and test whether it produces useful work rather than simply a fuller diary.

FOUR-BLOCK CALENDAR SPRINT

TWO WEEKS / FOUR PROTECTED BLOCKS

30	30	30	30
MINUTES	MINUTES	MINUTES	MINUTES

Record booked and actual use separately; keep a legitimate urgent-exception route.

01 Contribution

02 Time plan

03 Displacement

04 Boundary

05 Evidence

06 Adjustment

Basis: H01 | Original executive application

X57 Strategic calendar sprint

ACTIVITY

Protect a small amount of time for an agreed executive contribution and test whether it produces useful work rather than simply a fuller diary.

FOUR-BLOCK CALENDAR SPRINT

TWO WEEKS / FOUR PROTECTED BLOCKS

30	30	30	30
MINUTES	MINUTES	MINUTES	MINUTES
USED	USED	USED	NOT USED

Source example: 3 of 4 blocks used (75%). Block order is illustrative; useful output still needs review.

01 Contribution

Prepare a clearer gate brief before stakeholders begin their review.

02 Time plan

Two 30-minute blocks each week for two weeks.

03 Displacement

Routine status collection moves to the coordinator with an agreed template and capacity check.

04 Boundary

Urgent safety or material decision issues interrupt; routine updates use a separate channel.

05 Evidence

Three of four blocks are used and the brief circulates earlier; one interruption reveals an unresolved authority issue.

06 Adjustment

Keep the blocks, clarify the authority issue and check the coordinator's workload before extending the arrangement.

Basis: H01 | Original executive application

X58

ACTIVITY

Stakeholder listening tour

Practise purposeful executive listening across different roles and turn what is heard into a transparent response, not an unbounded promise.

Practical guide | Working form | Worked example

EXCEL TAB X58 Stakeholder listening tour

TIME 40 minutes preparation; four short conversations; 45-minute synthesis

BRING A focused leadership question | Diverse, relevant stakeholders | Agreed consent and reporting boundaries

RUN THE ACTIVITY

01 Define the question and what the executive can influence. Explain that listening does not guarantee every request will be adopted.

02 Select contributors across role, power and work experience, considering who is usually missed. Offer accessible modes and avoid making attendance a test of loyalty.

03 Use a consistent short script: what helps, what gets in the way, what one change would matter, and what should I understand before acting?

CONTINUE THE METHOD

04 Listen without defending every current practice. Check understanding and ask permission before attributing comments or sharing examples.

05 Synthesize themes, differences and limits. Do not turn a small listening tour into a representative engagement survey or identify anonymous contributors through detail.

06 Respond with what will be done, what needs further examination and what cannot be promised. Agree how contributors will hear the outcome.

QUESTIONS TO OPEN THINKING

What should I understand before making a decision?

Whose experience is different from yours?

What would a useful response from me look like?

BOUNDARY & CAUTION

Do not collect concerns that you cannot safely handle without explaining the formal route. Listening must not become covert assessment or a promise of anonymity without protection.

BETWEEN SESSIONS / HAND-OFF

Complete the conversations, then close the loop with a factual response that includes limits.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

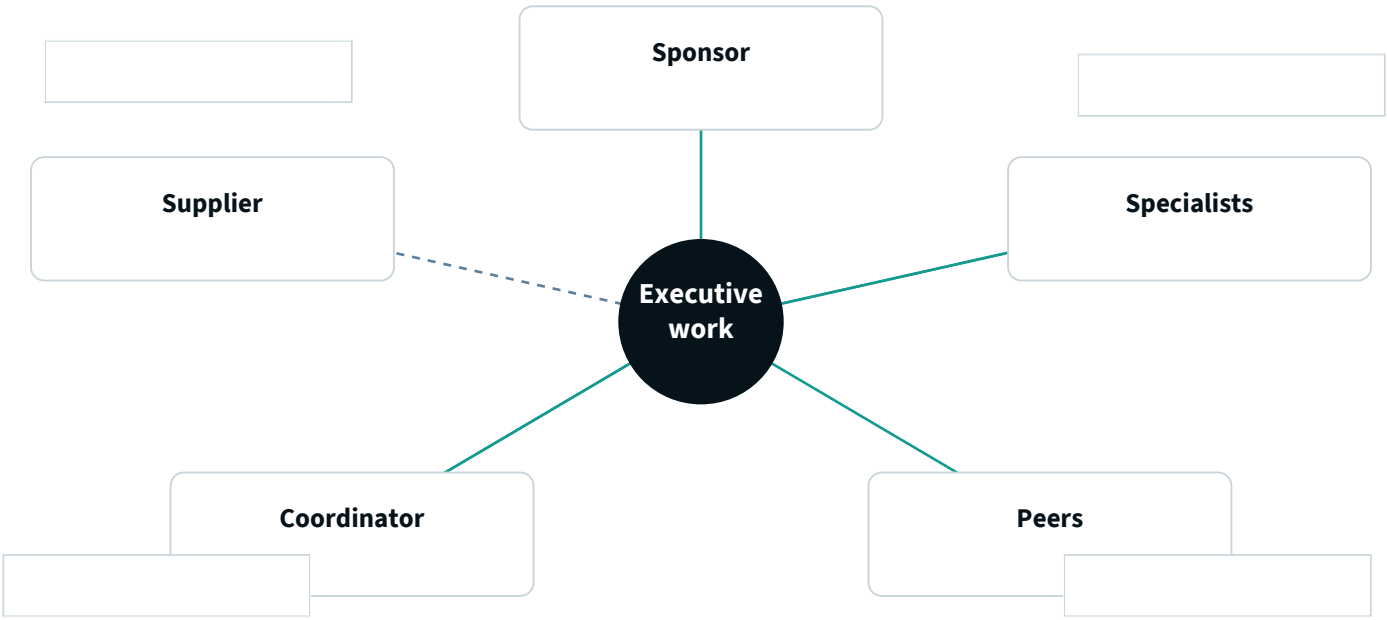
X58 Stakeholder listening tour

ACTIVITY

Practise purposeful executive listening across different roles and turn what is heard into a transparent response, not an unbounded promise.

Guide **Worksheet** Example LIVE WORKSHEET

STAKEHOLDER LISTENING-TOUR MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Purpose

02 Contributors

03 Script

04 Themes

05 Response

06 Feedback loop

Basis: H01 / H04 | Original executive application

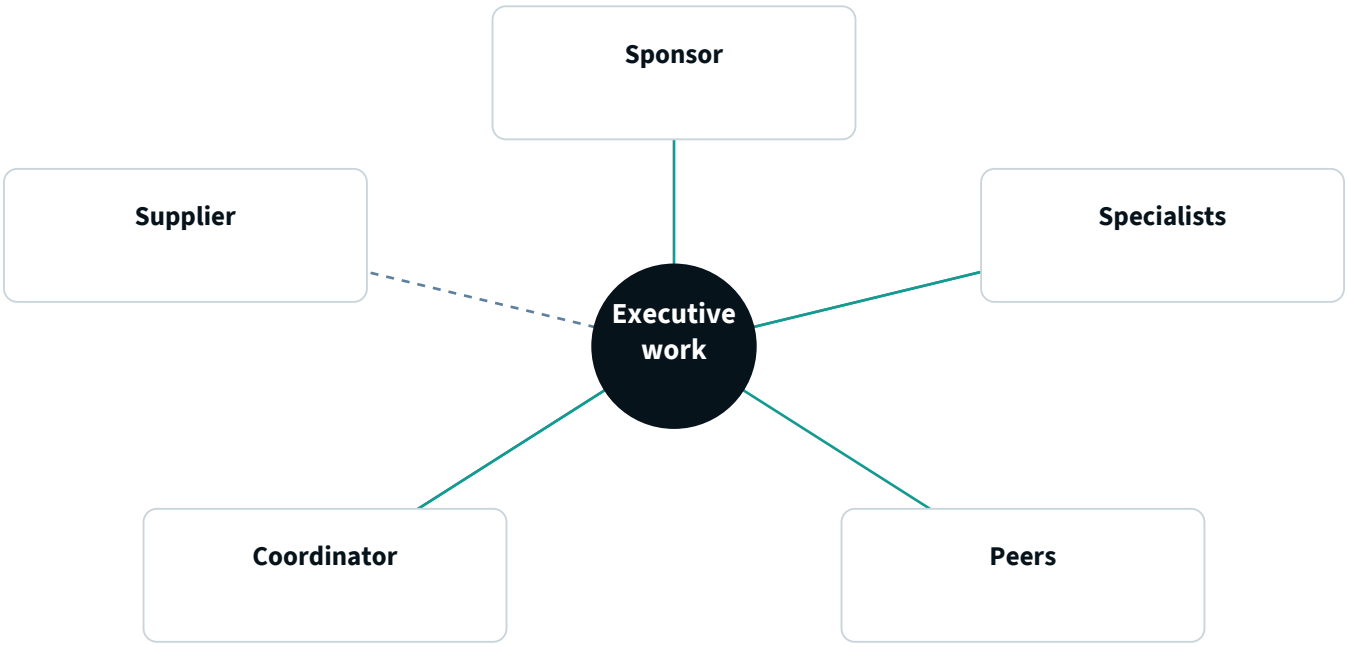
X58 Stakeholder listening tour

ACTIVITY

Practise purposeful executive listening across different roles and turn what is heard into a transparent response, not an unbounded promise.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

STAKEHOLDER LISTENING-TOUR MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Purpose

Understand what makes gate preparation difficult across specialist and delivery roles.

02 Contributors

Engineering, commercial, delivery coordination and one frontline user of the decision record.

03 Script

What helps? What gets in the way? What change would matter? What am I missing?

04 Themes

Earlier decision questions help; information dependencies differ by function.

05 Response

M-07 will trial an earlier brief and escalate the supplier dependency, but will not promise a new platform.

06 Feedback loop

Send a permitted summary with actions and unresolved questions, then review after the next gate cycle.

Basis: H01 / H04 | Original executive application

X59

ACTIVITY

Reciprocal network development

Strengthen a work relationship through a useful reciprocal exchange rather than treating networking as influence over people.

Practical guide | Working form | Worked example

EXCEL TAB X59 Reciprocal network developm

TIME 35 minutes setup; two conversations; 30-minute review

BRING Relationship map X25 | One legitimate shared work need | A clear offer as well as a request

RUN THE ACTIVITY

01 Choose one relationship relevant to the coaching goal and clarify why stronger coordination would help the work. Avoid selecting people solely for status.

02 Ask what the coachee understands about the other role's needs and what remains an assumption. Identify a respectful question to check it.

03 Prepare a concrete offer of information, support or collaboration and a proportionate request. Do not imply an obligation to reciprocate personally.

CONTINUE THE METHOD

04 Hold a short conversation focused on shared work, boundaries and practical next steps. Respect refusal, competing priorities and power differences.

05 Deliver the agreed contribution and observe whether the exchange improved coordination. Do not score the person as an ally or opponent.

06 Review what was learned about the relationship and whether further contact is useful. Maintain the relationship without creating dependency or inappropriate favours.

QUESTIONS TO OPEN THINKING

What useful contribution can you offer?

What do you need to understand about their role?

What would a fair exchange look like?

BOUNDARY & CAUTION

Do not use coaching to cultivate improper favours, manipulate vulnerable people or bypass procurement and governance rules.

BETWEEN SESSIONS / HAND-OFF

Make the agreed contribution first and review the actual coordination benefit rather than the number of contacts made.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 | Original executive application

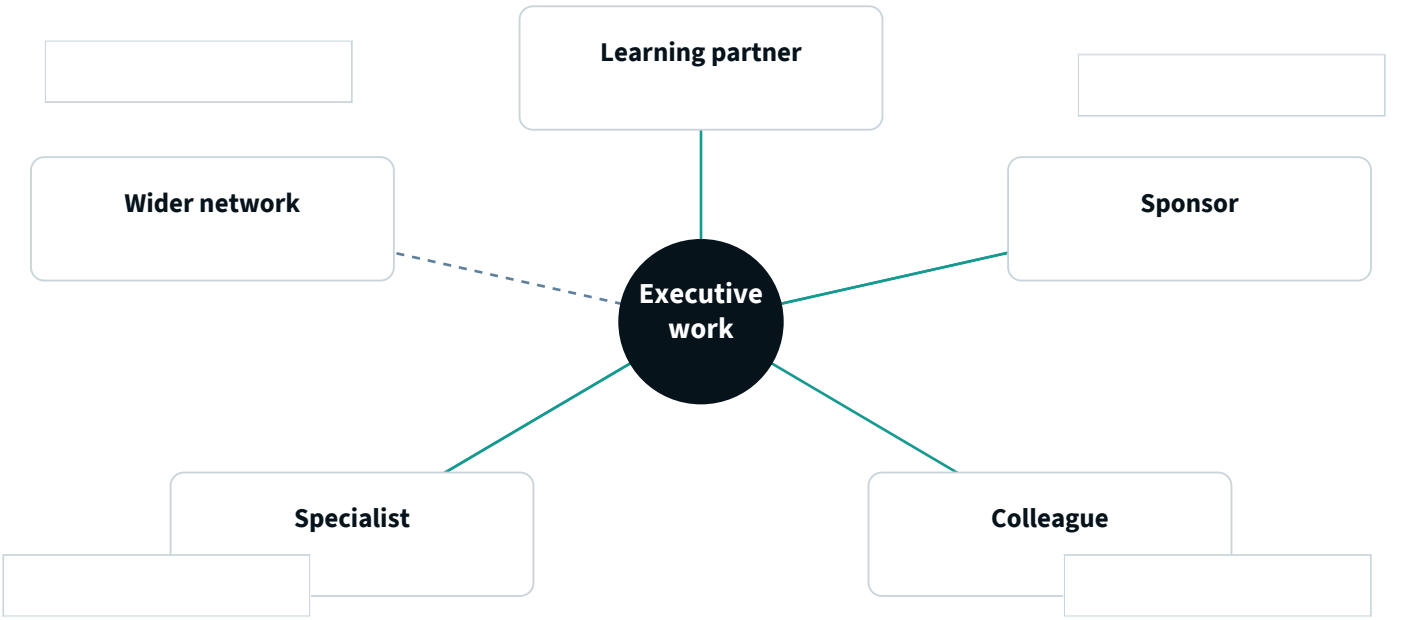
X59 Reciprocal network development

ACTIVITY

Strengthen a work relationship through a useful reciprocal exchange rather than treating networking as influence over people.

Guide **Worksheet** Example LIVE WORKSHEET

RECIPROCAL NETWORK MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Relationship

02 Shared need

03 Offer

04 Request

05 Action

06 Review

Basis: H01 | Original executive application

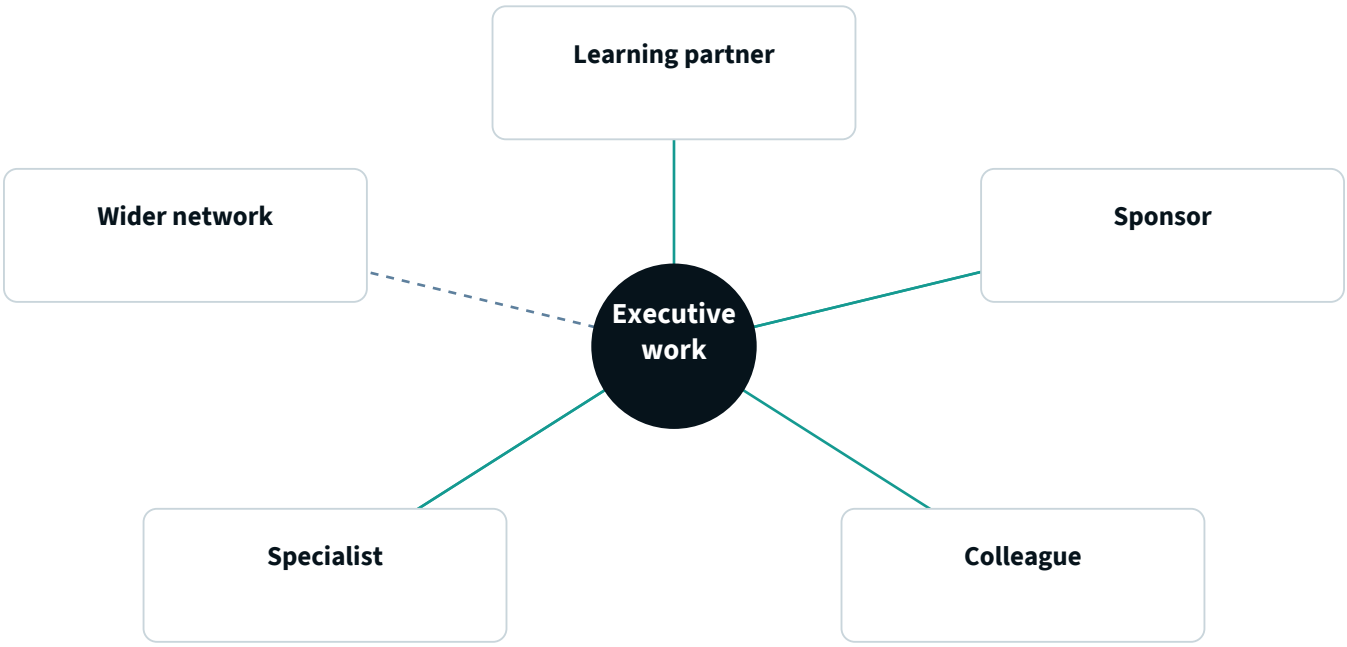
X59 Reciprocal network development

ACTIVITY

Strengthen a work relationship through a useful reciprocal exchange rather than treating networking as influence over people.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

RECIPROCAL NETWORK MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Relationship

M-07 and the procurement lead have limited contact outside escalations.

02 Shared need

Earlier visibility of supplier evidence dependencies.

03 Offer

Provide a clear forward view of gate dates and decision-critical inputs.

04 Request

Agree a short route for identifying supplier risks before they become urgent.

05 Action

Hold one planning conversation and deliver the forward view on the agreed date.

06 Review

Check whether one dependency was surfaced earlier and whether the exchange was useful to both roles.

Basis: H01 | Original executive application

X60

ACTIVITY

Habit cues and friction

Make a chosen leadership behaviour easier to repeat by linking it to a reliable cue and changing the immediate work environment.

Practical guide | Working form | Worked example

EXCEL TAB X60 Habit cues and friction

TIME 40 minutes setup; three weeks observation

BRING One small, observable behaviour | A recurring work cue | A simple private tracker

RUN THE ACTIVITY

01 Choose a behaviour small enough to repeat, such as asking for options before giving advice. Avoid broad goals such as become more empowering.

02 Identify an existing cue that reliably occurs in the relevant situation. Write an if-then plan and test whether the cue is noticeable.

03 Remove one source of friction and add one practical reminder. The reminder should support choice, not create intrusive monitoring.

CONTINUE THE METHOD

04 Plan for a missed opportunity or an exceptional situation. A safety-critical instruction may appropriately override the practice.

05 Track opportunities and attempts briefly, including why the behaviour was or was not appropriate. Do not assume a streak proves automaticity or impact.

06 Review the behaviour's usefulness and context. Retain, adapt or stop it; no universal number of days guarantees a habit.

QUESTIONS TO OPEN THINKING

What reliable event can cue the practice?

What makes the desired action harder than the old one?

What will you do after a missed attempt?

BOUNDARY & CAUTION

Do not promise a habit in 21 or 66 days. Repetition counts are not evidence of capability or business impact.

BETWEEN SESSIONS / HAND-OFF

Use the small tracker and bring one example where the behaviour helped and one where an exception was appropriate.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R18 / R25 | Original executive application

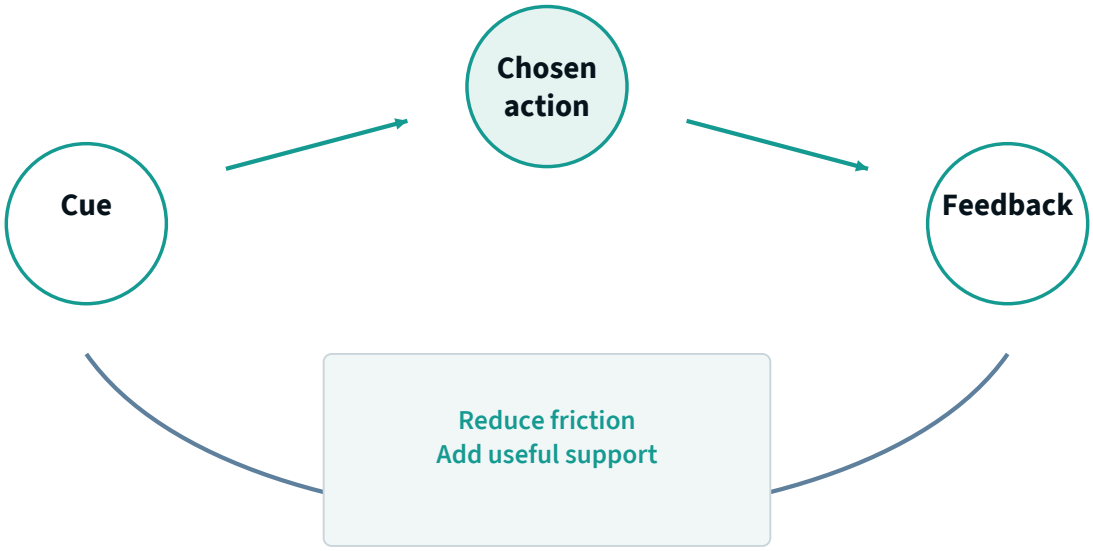
X60 Habit cues and friction

ACTIVITY

Make a chosen leadership behaviour easier to repeat by linking it to a reliable cue and changing the immediate work environment.

Guide **Worksheet** Example LIVE WORKSHEET

CUE-ACTION-FEEDBACK LOOP



Design the environment as well as the intention. A missed opportunity is not automatically low motivation.

01 Behaviour

02 Cue

03 Friction removed

04 If-then plan

05 Exception and restart

06 Evidence

Basis: H01 / R18 / R25 | Original executive application

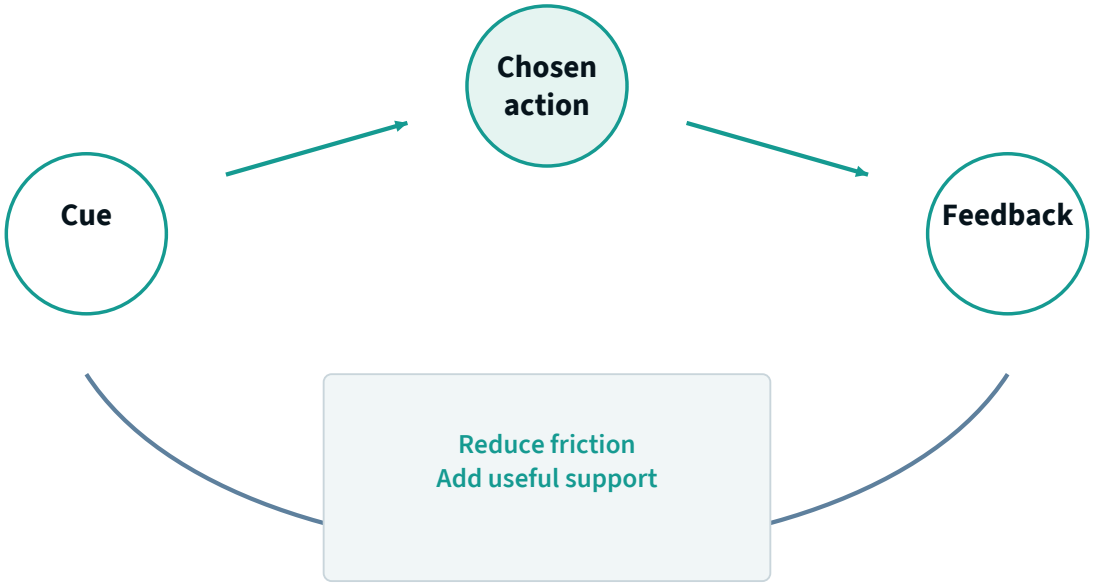
X60 Habit cues and friction

ACTIVITY

Make a chosen leadership behaviour easier to repeat by linking it to a reliable cue and changing the immediate work environment.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

CUE-ACTION-FEEDBACK LOOP



Design the environment as well as the intention. A missed opportunity is not automatically low motivation.

01 Behaviour

Ask a colleague for options and reasoning before supplying an answer.

02 Cue

When a routine recommendation is brought to M-07 at the agreed checkpoint.

03 Friction removed

Keep a short prompt on the meeting note rather than relying on memory under pressure.

04 If-then plan

If a colleague asks what to do, then first ask which options they see and what they recommend.

05 Exception and restart

Give direct instruction for urgent safety or authority issues; after a missed routine attempt, restart at the next appropriate opportunity.

06 Evidence

Record opportunities and attempts for three weeks, then review whether ownership and decision quality improved.

Basis: H01 / R18 / R25 | Original executive application

X61

ACTIVITY

WOOP work experiment

Combine a feasible wish with an anticipated internal obstacle and a concrete if-then response, while retaining attention to external constraints.

Practical guide | Working form | Worked example

EXCEL TAB X61 WOOP work experiment

TIME 40 minutes

BRING A self-chosen, feasible work wish | A quiet reflection space | A real opportunity within the next fortnight

RUN THE ACTIVITY

01 Choose a wish that is meaningful, challenging and feasible within the coachee's influence. Do not use the method to make an impossible organisational demand sound attainable.

02 Describe the most useful outcome and why it matters. Keep the account concrete and proportionate rather than promising transformation.

03 Identify an internal obstacle that the coachee is willing to examine, such as a habitual urge to answer first. Separately record external barriers requiring management action.

QUESTIONS TO OPEN THINKING

What feasible wish matters now?

What in your own response could get in the way?

If that obstacle appears, what exactly will you do?

CONTINUE THE METHOD

04 Form an if-then plan linking a recognisable cue to a specific response. The action should be small enough to use in the real situation.

05 Rehearse the cue and response, checking safety, authority and feasibility. Revise the wish if its conditions are not available.

06 Review what happened at the opportunity. The result may support a different plan or show that a system condition must change first.

BOUNDARY & CAUTION

WOOP is not a replacement for resources, authority or qualified support. Do not imply that failure means the coachee lacked desire.

BETWEEN SESSIONS / HAND-OFF

Use the plan once in the agreed situation, then record the cue, response and consequence.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R18 / R19 / R20 | Original executive application

X61 WOOP work experiment

ACTIVITY

Combine a feasible wish with an anticipated internal obstacle and a concrete if-then response, while retaining attention to external constraints.

Guide **Worksheet** Example LIVE WORKSHEET

W O O P

01 Wish

02 Outcome

03 Internal obstacle

05 If-then plan

04 External barrier

06 Review

Basis: H01 / R18 / R19 / R20 | Original executive application

X61 WOOP work experiment

ACTIVITY

Combine a feasible wish with an anticipated internal obstacle and a concrete if-then response, while retaining attention to external constraints.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

W O O P

01 Wish

At the next gate, invite useful challenge before stating the preferred recommendation.

02 Outcome

Material concerns are heard early enough to inform the decision.

03 Internal obstacle

M-07 feels an urge to demonstrate certainty by giving the answer first.

05 If-then plan

If I feel the urge to close the discussion early, then I will ask what evidence could change the recommendation and summarise the answer.

04 External barrier

Late evidence still needs a separate checkpoint agreement.

06 Review

Check whether the question was used and whether it changed the quality of discussion, not simply whether the wish felt motivating.

Basis: H01 / R18 / R19 / R20 | Original executive application

X62

ACTIVITY

Role-crafting proposal

Explore a small, authorised adjustment to tasks or relationships that better uses capability and supports the role's purpose.

Practical guide | Working form | Worked example

EXCEL TAB X62 Rolecrafting proposal

TIME 55 minutes

BRING Role mandate and current workload | One task or relationship to improve | Relevant manager and team authority

RUN THE ACTIVITY

01 Map a bounded part of the role and identify where work is valuable, necessary but draining, or poorly aligned with the mandate. Do not treat unpleasant duties as automatically removable.

02 Explore small adjustments to task sequence, collaboration or the way the work's purpose is understood. Identify who else would be affected.

03 Test each option against role responsibilities, fairness, capacity and required authorisation. The coachee cannot unilaterally redesign colleagues' work.

QUESTIONS TO OPEN THINKING

What part of the role could be designed more usefully?

Who would inherit the work or consequence?

What would make this a fair, authorised trial?

CONTINUE THE METHOD

04 Choose one proposal that improves contribution without shifting an unreasonable burden. Define what remains unchanged and what support is needed.

05 Prepare a conversation with the accountable manager or team, explaining purpose, trial boundaries and evidence. Accept that the proposal may be declined or revised.

06 Run only the authorised trial and review work quality, burden and contribution. Retain the adjustment only if it helps the wider system as well as the coachee.

BOUNDARY & CAUTION

This is an independent HR Delivery proposal exercise, not a reproduction of the licensed Job Crafting Exercise. Required duties and employment terms need proper authorisation.

BETWEEN SESSIONS / HAND-OFF

Discuss the proposal with affected people and run only the agreed trial.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R23 | Original executive application

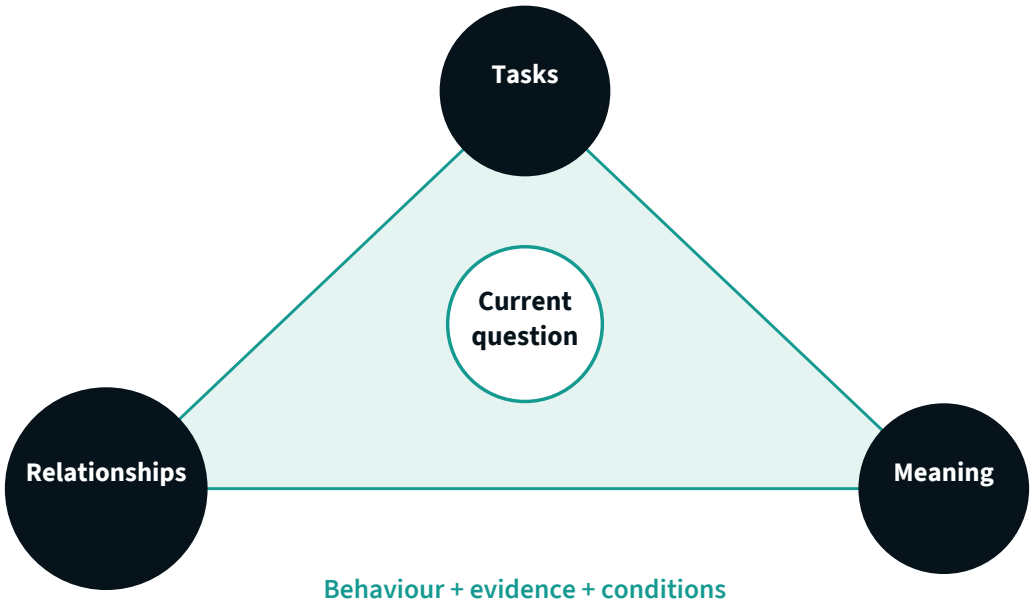
X62 Role-crafting proposal

ACTIVITY

Explore a small, authorised adjustment to tasks or relationships that better uses capability and supports the role's purpose.

Guide **Worksheet** Example LIVE WORKSHEET

ROLE-CRAFTING LENSES



Behaviour + evidence + conditions

Use all three lenses. A personal explanation does not remove organisational responsibility.

01 Work area

02 Proposed adjustment

03 Value

04 Fairness and capacity

05 Authorised trial

06 Review

Basis: H01 / R23 | Original executive application

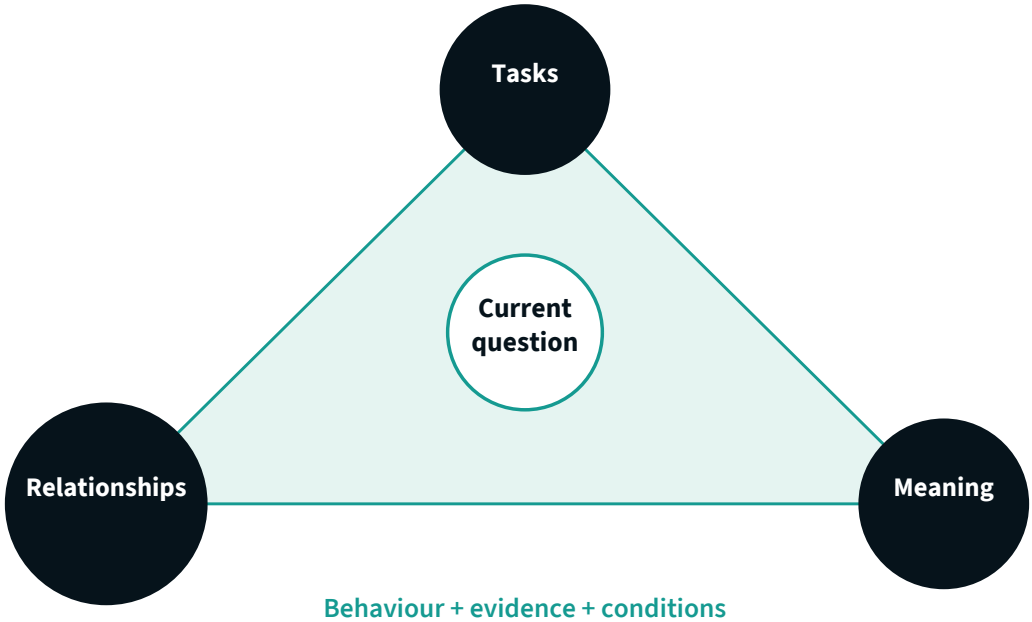
X62 Role-crafting proposal

ACTIVITY

Explore a small, authorised adjustment to tasks or relationships that better uses capability and supports the role's purpose.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

ROLE-CRAFTING LENSES



Use all three lenses. A personal explanation does not remove organisational responsibility.

01 Work area

M-07 spends excessive time consolidating routine status information before gate preparation.

02 Proposed adjustment

Use a coordinator-led status summary so the director can focus on decision framing.

03 Value

More attention to trade-offs and unresolved evidence, while keeping routine information visible.

04 Fairness and capacity

The coordinator's workload and capability are checked; the task is not simply added without support.

05 Authorised trial

Manager and coordinator agree a two-cycle trial with a clear template and escalation route.

06 Review

Compare preparation quality, coordinator burden and missed information before making the change permanent.

Basis: H01 / R23 | Original executive application

X63

ACTIVITY

Confidence through work evidence

Build a more grounded view of readiness by reviewing specific practice and feedback rather than relying on reassurance or a global confidence rating.

Practical guide | Working form | Worked example

EXCEL TAB X63 Confidence through work evi

TIME 35 minutes setup; two practice opportunities; 30-minute review

BRING A task-specific capability goal | A safe opportunity to practise | A suitable feedback partner

RUN THE ACTIVITY

01 Define the task and the behaviour needed. Ask what evidence would indicate sufficient preparation, distinguishing confidence from competence.

02 Identify existing capability and a manageable gap. Choose practice that targets the gap rather than repeating what the coachee already does well.

03 Arrange a low-risk rehearsal or supported real task with permission. State any qualification, authorisation or safety conditions that must remain in place.

QUESTIONS TO OPEN THINKING

What can you demonstrate, not just feel?

Which part of the task needs practice?

What evidence would justify the next step?

CONTINUE THE METHOD

04 Collect specific feedback on the behaviour and result. Avoid global praise or a single judgement that the person is now ready for every similar situation.

05 Repeat with one adjustment and compare evidence across opportunities. Note contextual differences and where further support remains necessary.

06 Update the coachee's confidence account using the evidence, while retaining uncertainty. Decide the next appropriate level of practice or support.

BOUNDARY & CAUTION

Confidence is not certification. Do not infer competence for high-risk tasks from self-ratings, coaching participation or a small rehearsal.

BETWEEN SESSIONS / HAND-OFF

Record the behaviour, feedback and remaining gap after each practice opportunity.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X63 Confidence through work evidence

ACTIVITY

Build a more grounded view of readiness by reviewing specific practice and feedback rather than relying on reassurance or a global confidence rating.

Guide **Worksheet** Example LIVE WORKSHEET

CONFIDENCE / WORK-EVIDENCE PLOTTER



Qualitative discussion space with self-defined anchors; no competence cut-offs or psychometric score.

01 Task

02 Existing evidence

03 Practice gap

04 Supported practice

05 Feedback

06 Next step

Basis: H01 / H04 | Original executive application

X63 Confidence through work evidence

ACTIVITY

Build a more grounded view of readiness by reviewing specific practice and feedback rather than relying on reassurance or a global confidence rating.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

CONFIDENCE / WORK-EVIDENCE PLOTTER



Qualitative discussion space with self-defined anchors; no competence cut-offs or psychometric score.

01 Task

Summarise a complex challenge without becoming defensive or abandoning the decision.

02 Existing evidence

M-07 can explain the decision question clearly in rehearsal.

03 Practice gap

Listening to a strong objection and accurately restating it before responding.

04 Supported practice

Two role-plays followed by one routine review with an agreed observer.

05 Feedback

The second attempt captures the objection accurately; the real review still needs a clearer closing condition.

06 Next step

Practise closure separately and retain support for the formal gate rather than declaring complete readiness.

Basis: H01 / H04 | Original executive application

X64

ACTIVITY

Targeted behavioural feedback pulse

Obtain a small amount of feedback on a named work practice without recreating a 360 test or claiming validated measurement.

Practical guide | Working form | Worked example

EXCEL TAB X64 Targeted behavioural feedba

TIME 30 minutes design; short collection; 30-minute review

BRING One target behaviour | Consenting observers with real opportunities to see it | A clear privacy rule

RUN THE ACTIVITY

01 Define the behaviour and the observation window in plain language. Choose a narrow question that contributors can answer from direct experience.

02 Agree who will be asked and how information will be reported. Do not promise anonymous group results when numbers or comments could identify people.

03 Use three separate prompts: did you observe the practice; what difference, if any, did it make; what should be retained or changed? Allow not observed and no comment.

CONTINUE THE METHOD

04 Collect minimal data and preserve the distinction between frequency, usefulness and context. Do not average them into an impact score.

05 Review responses, missing observations and contrary evidence with the coachee. A small convenience sample does not establish general improvement.

06 Choose the next practice adjustment and close the loop with contributors using only agreed information.

QUESTIONS TO OPEN THINKING

What could the observer actually see?

What did the practice change, if anything?

What should we not infer from these responses?

BOUNDARY & CAUTION

This is an original feedback aid, not a validated instrument. No combined score, norm or employment judgement is appropriate.

BETWEEN SESSIONS / HAND-OFF

Ask only the agreed observers and bring the full pattern, including not-observed and unhelpful responses.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H05 / R04 | Original executive application

X64 Targeted behavioural feedback pulse

ACTIVITY

Obtain a small amount of feedback on a named work practice without recreating a 360 test or claiming validated measurement.

OBSERVED / NOT-EXPOSED COVERAGE CHART

FOUR CONTRIBUTORS / OBSERVATION COVERAGE

Asked	Observed	No exposure	No response

Keep observation, effect and suggestions separate. Always retain denominators and missing observations.

01 Behaviour and window

02 Participants

03 Prompts

04 Illustrative result

05 Interpretation

06 Next step

Basis: H01 / H05 / R04 | Original executive application

X64 Targeted behavioural feedback pulse

ACTIVITY

Obtain a small amount of feedback on a named work practice without recreating a 360 test or claiming validated measurement.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

OBSERVED / NOT-EXPOSED COVERAGE CHART

FOUR CONTRIBUTORS / OBSERVATION COVERAGE



Observed | Observed | Observed | No relevant exposure

3 / 4

Observation is separate from usefulness or leadership improvement.

Retained fictional result: two found the question clearer; one wanted more preparation time.

01 Behaviour and window

M-07 invites concerns before stating a preference at the next two gate meetings.

02 Participants

Four colleagues who attended, with named responses by agreement rather than false anonymity.

03 Prompts

Was the practice observed? What difference did it make? What should be retained or changed?

04 Illustrative result

Three observed it; one did not attend the relevant part. Two found the question clearer; one wanted more preparation time.

05 Interpretation

The feedback supports retaining the opening, with a timing adjustment; it does not prove a general leadership change.

06 Next step

Circulate the brief earlier and ask the same narrow questions after another appropriate opportunity.

Basis: H01 / H05 / R04 | Original executive application

X65

ACTIVITY

Prospective decision journal

Create a record of reasoning before outcomes are known so the executive can learn without rewriting the past through hindsight.

Practical guide | Working form | Worked example

EXCEL TAB X65 Prospective decision journa

TIME 20 minutes per decision; 45-minute periodic review

BRING A decision suitable for recording | Approved secure storage | Clear separation from formal corporate records

RUN THE ACTIVITY

01 Before deciding, write the question, options, criteria and information available. Keep the coaching journal supplementary to, not a replacement for, the authorised decision record.

02 Record the key assumptions and uncertainties, including what evidence would change the choice. Use probabilities only where there is a defensible basis and a clear purpose.

03 State the chosen action, rationale, authority and any conditions. Do not retroactively alter the entry after the result is known.

QUESTIONS TO OPEN THINKING

What are you assuming before the result is known?

What would change your mind?

Was the process sound even if the outcome disappointed?

CONTINUE THE METHOD

04 Set a review date appropriate to the decision and note contextual events that could affect the outcome.

05 At review, compare the process and outcome separately. A good process may have an unfavourable outcome and a poor process may be lucky.

06 Identify one reasoning practice to retain and one to change. Review patterns across decisions before making claims about stable judgement.

BOUNDARY & CAUTION

Protect confidential business information and legal privilege. Do not use personal notes to contradict or conceal required official documentation.

BETWEEN SESSIONS / HAND-OFF

Make one prospective entry and review it without changing the original wording.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X65 Prospective decision journal

ACTIVITY

Create a record of reasoning before outcomes are known so the executive can learn without rewriting the past through hindsight.

BEFORE

01 Decision question

02 Options and criteria

03 Assumptions

04 Choice and conditions

AFTER / LEARNING

05 Review observation

06 Learning

Basis: H01 / H04 | Original executive application

X65 Prospective decision journal

ACTIVITY

Create a record of reasoning before outcomes are known so the executive can learn without rewriting the past through hindsight.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

BEFORE

01 Decision question

Whether to recommend a bounded gate approval while a supplier confirmation is outstanding.

02 Options and criteria

Delay, approve fully or approve a permitted bounded step; mandatory assurance must remain complete.

03 Assumptions

Supplier response is expected within a week but not guaranteed; procurement owns follow-up.

04 Choice and conditions

Recommend the bounded step with the unresolved item, owner and stop condition explicit.

AFTER / LEARNING

05 Review observation

The supplier responds late; the condition prevents downstream commitment beyond the approved scope.

06 Learning

Retain explicit conditions and improve the evidence supporting supplier timing assumptions.

Basis: H01 / H04 | Original executive application

X66

ACTIVITY

Learning-partner check-in

Create a light, reciprocal support routine for workplace practice without disclosing private coaching content or outsourcing the coach's responsibilities.

Practical guide | Working form | Worked example

EXCEL TAB X66 Learningpartner checkin

TIME 20 minutes setup; weekly 15-minute check-ins

BRING A chosen practice | A willing learning partner | A clear confidentiality and role boundary

RUN THE ACTIVITY

01 Choose a partner who can support the work without an inappropriate power conflict. Confirm that participation is voluntary and that the partner is not being made a secret evaluator.

02 Agree the practice, what can be discussed and what remains private. Share the minimum necessary goal, not raw assessment data or session notes.

03 Use a short sequence: intended action, what happened, what was learned, and the next small step. The partner asks before advising.

CONTINUE THE METHOD

04 Explore missed practice through opportunity, relevance and support rather than blame. Escalate issues beyond the partner's role through the proper route.

05 Record only the action and learning needed for follow-through. Keep the arrangement manageable and allow either party to stop.

06 Review whether the partnership is useful after three check-ins and adjust or end it without implying failure.

QUESTIONS TO OPEN THINKING

What did you intend to try?

What happened in work?

What is the next useful step, and what support do you need?

BOUNDARY & CAUTION

A learning partner is not a therapist, investigator or substitute for qualified coaching supervision. Do not create an informal reporting channel to the sponsor.

BETWEEN SESSIONS / HAND-OFF

Hold one check-in using the four questions and bring any boundary or usefulness concern to the coach.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X66 Learning-partner check-in

ACTIVITY

Create a light, reciprocal support routine for workplace practice without disclosing private coaching content or outsourcing the coach's responsibilities.

Guide **Worksheet** Example LIVE WORKSHEET

LEARNING-PARTNER EXCHANGE



Intention / experience / learning / next step

A voluntary reciprocal conversation, not a hidden evaluation or a route to private coaching notes.

01 Partner

02 Shared goal

03 Boundary

04 Check-in

05 Next step

06 Review

Basis: H01 / H04 | Original executive application

X66 Learning-partner check-in

ACTIVITY

Create a light, reciprocal support routine for workplace practice without disclosing private coaching content or outsourcing the coach's responsibilities.

LEARNING-PARTNER EXCHANGE



Intention / experience / learning / next step

A voluntary reciprocal conversation, not a hidden evaluation or a route to private coaching notes.

01 Partner

A peer director who has agreed to a short reciprocal learning conversation.

02 Shared goal

Practise a concerns-first opening in decision meetings.

03 Boundary

No private coaching notes, raw assessment reports or confidential third-party details are shared.

04 Check-in

M-07 describes the attempt, the response and one timing issue; the partner asks what could be adjusted.

05 Next step

Send the decision question earlier and repeat the practice at one appropriate meeting.

06 Review

After three weeks, both decide whether the check-in adds value or should stop.

Basis: H01 / H04 | Original executive application

X67

ACTIVITY

After-action review of a difficult conversation

Learn from a real interaction by comparing intent, behaviour, response and consequences, then choosing a proportionate repair or next practice.

Practical guide | Working form | Worked example

EXCEL TAB X67 Afteraction review of a dif

TIME 45 minutes

BRING A completed conversation | Any agreed record | Permission to discuss only necessary information

RUN THE ACTIVITY

01 Ask what the coachee intended to achieve and what actually happened. Reconstruct the sequence before evaluating whether the conversation was a success.

02 Identify the words and behaviours that helped or hindered. Separate the other person's actual response from interpretations of their motivation.

03 Examine context, power and any unmet needs. Consider whether a formal process or system action is required rather than another private conversation.

CONTINUE THE METHOD

04 Ask what remains unresolved and who is affected. Choose a repair, clarification or follow-up that respects the other person's autonomy.

05 Rehearse one improved response for a future comparable situation. Avoid replaying the entire conversation repeatedly without a learning purpose.

06 Record the learning and next action, then close the review. Where the experience has caused significant distress, use the appropriate support route.

QUESTIONS TO OPEN THINKING

What did you intend, and what happened?

Which part of your behaviour made a difference?

What remains unresolved for the other person?

BOUNDARY & CAUTION

Do not use the review to rationalise harm or treat the other person's agreement as the only sign of success. Formal obligations remain in force.

BETWEEN SESSIONS / HAND-OFF

Complete the agreed follow-up and record whether it resolved the specific issue or revealed another dependency.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

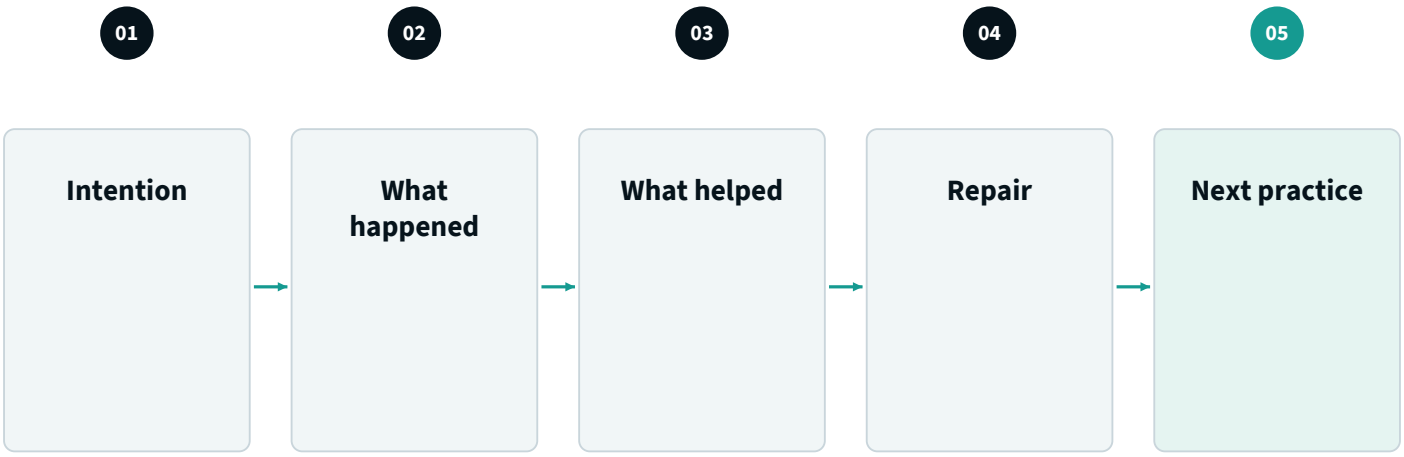
BASIS H01 / R15 | Original executive application

X67 After-action review of a difficult conversation

ACTIVITY

Learn from a real interaction by comparing intent, behaviour, response and consequences, then choosing a proportionate repair or next practice.

AFTER-ACTION CONVERSATION REVIEW



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Intention

02 What happened

03 Helpful behaviour

04 Unhelpful moment

05 Repair and next action

06 Learning

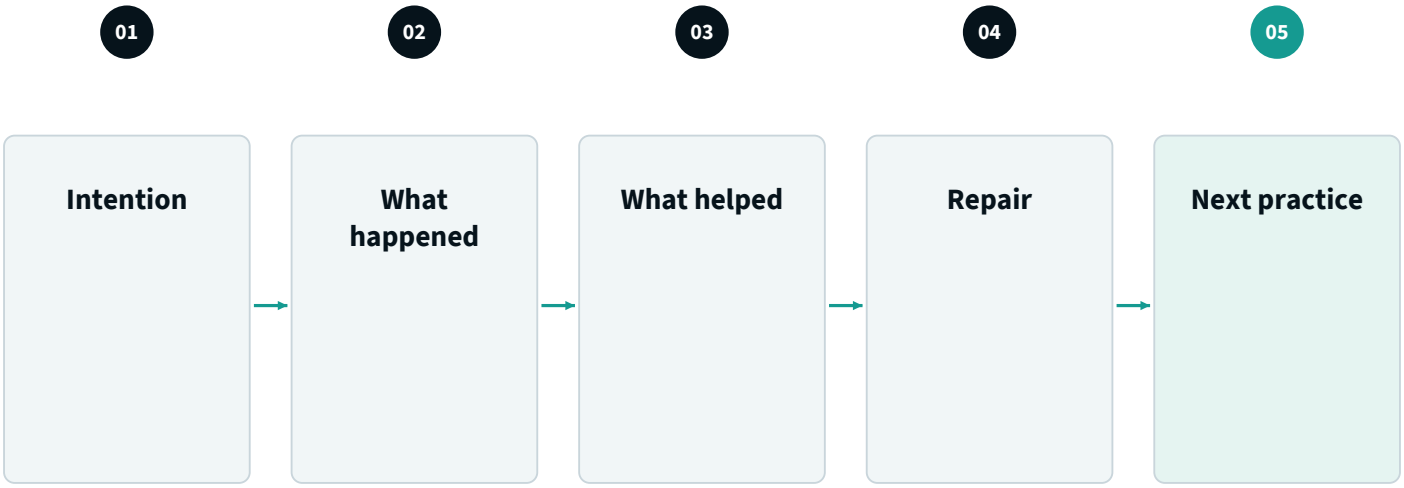
Basis: H01 / R15 | Original executive application

X67 After-action review of a difficult conversation

ACTIVITY

Learn from a real interaction by comparing intent, behaviour, response and consequences, then choosing a proportionate repair or next practice.

AFTER-ACTION CONVERSATION REVIEW



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Intention

Agree a workable evidence deadline with the commercial lead.

02 What happened

The lead explained a supplier dependency; the original deadline could not be met reliably.

03 Helpful behaviour

M-07 asked about the process before attributing the delay to poor ownership.

04 Unhelpful moment

M-07 initially offered a solution before checking the lead's capacity.

05 Repair and next action

Confirm the lead's proposed provisional-update route and jointly escalate the supplier issue.

06 Learning

A clearer question exposed a system barrier that a firmer demand alone would not have solved.

Basis: H01 / R15 | Original executive application

X68

ACTIVITY

Setback and restart plan

Respond constructively when a practice is interrupted, distinguishing an ordinary lapse from an unsuitable goal or a missing condition.

Practical guide | Working form | Worked example

EXCEL TAB X68 Setback and restart plan

TIME 40 minutes

BRING A practice that stalled | Brief evidence of opportunities and attempts | Current workload and support conditions

RUN THE ACTIVITY

01 Describe what stopped and when, using concrete events rather than a global judgement about motivation. Ask whether the goal still matters.

02 Examine opportunity, permission, capability, workload and the design of the action. A missed practice may reveal an unrealistic or irrelevant assignment.

03 Identify what was useful before the setback and what has changed. Avoid insisting on persistence when the practice is harmful or no longer fits.

QUESTIONS TO OPEN THINKING

What changed in the conditions?

Is the practice still worth doing?

What is the smallest honest restart?

CONTINUE THE METHOD

04 Choose restart, simplify, redesign, defer or stop. If restarting, define the next small opportunity and a realistic support.

05 Prepare an if-then response for the most likely interruption, including a legitimate exception. Do not build a punitive streak system.

06 Agree a short review and retain the learning from the setback. Progress includes making a better choice about what not to continue.

BOUNDARY & CAUTION

Do not treat a lapse as proof of resistance or pressure a coachee to continue an unsuitable intervention. Safety and role requirements may justify stopping.

BETWEEN SESSIONS / HAND-OFF

Try the revised small action and report what the conditions allowed, not what you think the coach wants to hear.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R18 / R25 | Original executive application

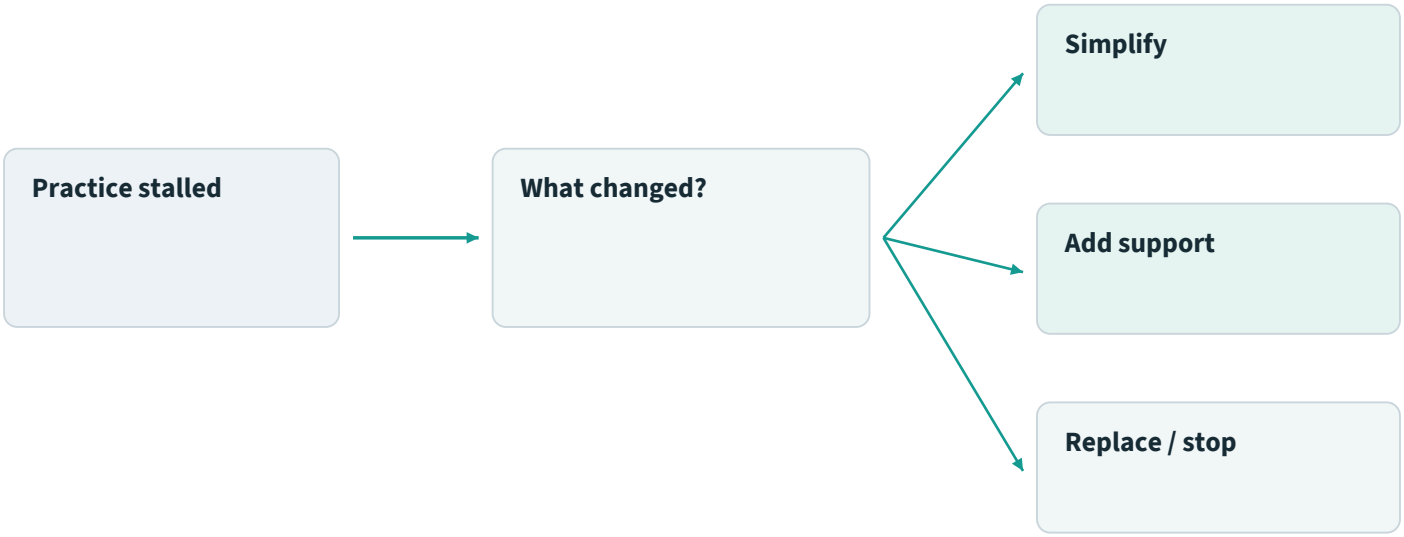
X68 Setback and restart plan

ACTIVITY

Respond constructively when a practice is interrupted, distinguishing an ordinary lapse from an unsuitable goal or a missing condition.

Guide **Worksheet** Example LIVE WORKSHEET

SETBACK-AND-RESTART DECISION ROUTE



Review purpose, opportunity, permission, workload and the design of the action.

Restart only when the practice remains useful. Persistence is not the default answer to every setback.

01 Stalled practice

02 Conditions

03 What still helps

04 Choice

05 Restart plan

06 Review

Basis: H01 / R18 / R25 | Original executive application

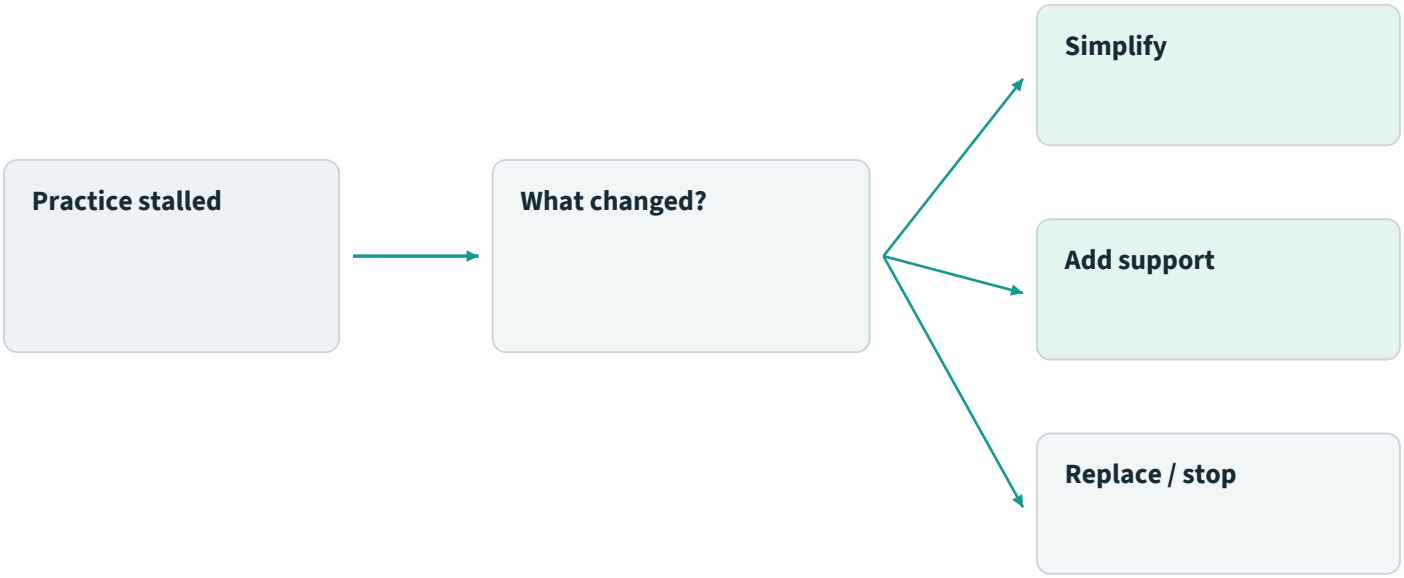
X68 Setback and restart plan

ACTIVITY

Respond constructively when a practice is interrupted, distinguishing an ordinary lapse from an unsuitable goal or a missing condition.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

SETBACK-AND-RESTART DECISION ROUTE



Review purpose, opportunity, permission, workload and the design of the action.

Restart only when the practice remains useful. Persistence is not the default answer to every setback.

01 Stalled practice

M-07 stopped using the concerns-first opening during an intense delivery week.

02 Conditions

Meetings were shortened and the evidence brief arrived late.

03 What still helps

The opening worked when the decision question was clear and preparation was possible.

04 Choice

Simplify the practice to one explicit evidence question at the next routine review.

05 Restart plan

If time is cut, retain the question about material missing evidence and route non-critical discussion separately.

06 Review

After two opportunities, decide whether the routine is sustainable or the meeting design needs a wider change.

Basis: H01 / R18 / R25 | Original executive application

THE 6A WORKPLACE COACHING SYSTEM

06

Assure

Protect quality; make a credible value decision

THE GATE

What should scale, adapt or stop?

MINIMUM OUTPUT

Quality + value decision

25 TOOLS & ACTIVITIES

Open the stage tool directory >

Assure: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T61	Coaching dashboard specification	492	493	494
T62	Experience and alliance pulse	495	496	497
T63	Goal progress review	500	501	502
T64	Behavioural evidence interview	503	504	505
T65	Contribution analysis	506	507	508
T66	Cost-consequence analysis	509	510	511
T67	Responsible ROI estimator	512	513	514
T68	Coach quality scorecard	515	516	517
T69	Supervision record	518	519	520
T70	Ethical decision record	521	522	523
T71	Incident and complaint pathway	524	525	526
T72	AI coaching assurance checklist	527	528	529
T73	Quarterly portfolio review	530	531	532

BEFORE YOU MOVE ON

What should scale, adapt or stop? Complete or revisit: Quality + value decision.

Assure: tools to use

Directory 2 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T74	Maturity assessment	533	534	535
T77	Coach selection and observed-practice rubric	540	541	542
T79	Supervision standard and cadence	543	544	545
T80	Coach authorisation, CPD and caseload record	546	547	548
T85	Evaluation design and data-collection matrix	549	550	551
T86	Aggregate themes and organisational action log	552	553	554
T87	Quality-assurance sampling plan	555	556	557
T88	Supplier/platform continuity and exit plan	558	559	560
X69	Anchored goal-attainment review	561	562	563
X70	Learning and contribution story	564	565	566
X71	Six-month maintenance and self-coaching plan	567	568	569
X72	Closure conversation and future letter	570	571	572

BEFORE YOU MOVE ON

What should scale, adapt or stop? Complete or revisit: Quality + value decision.

Protect quality; make a credible value decision

Assure operates throughout the journey and becomes explicit at review and closure. It protects ethics, competence, information and the coachee's agency, while examining what was useful and applied. A favourable satisfaction score cannot compensate for a serious boundary failure or establish organisational impact. [H01-H04]

Review several kinds of evidence

Distinguish access and participation, relationship experience, learning, application and work outcomes. Choose measures for a decision rather than collecting everything. Keep evidence from different levels and sources visible instead of collapsing it into a single coaching score.

Use goal anchors honestly

Review a goal against its predefined behavioural anchors and context. Mark insufficient evidence where necessary. Do not import clinical norms or compare people through unlike goals. A goal may be revised legitimately, but the original and the reason for revision must remain visible.

Make a contribution claim

Explain what coaching may have helped and what else changed. Include unsupported links, unsuccessful attempts, system barriers and adverse effects. Cost-consequence reporting is often more useful than an invented return on investment. Sensitivity calculations are scenarios, not causal estimates.

Supervise and improve practice

Coach supervision, observed practice, concerns handling and supplier assurance are not optional decorations. Use de-identified material and the appropriate authority. A toolkit does not grant competence, professional accreditation or permission to use a proprietary instrument.

Close without creating dependency

Review what the coachee can now carry independently, what remains owned elsewhere and what further help is appropriate. Agree the sponsor summary and the record lifecycle. A future engagement should have a new purpose rather than continue because ending feels uncomfortable.

Govern the programme as well as the engagement

At programme level, review access, quality, application, risk and evidence before scaling. Use T74's selected source rubric dimension by dimension; do not combine competing maturity conventions. Serious ethics, privacy or complaint gaps require action regardless of positive averages.

ASSURE / OPERATING ROUTE

Choose the next useful move.

These routes are practical suggestions, not a requirement to complete every tool.

01

Review the engagement

T61-T66, X69, X70 / Experience, goals and contribution

02

Protect professional quality

T68-T71, T77, T79, T80 / Observation, supervision and concerns

03

Assure technology and provision

T72, T81, T87, T88 / AI, provider quality and continuity

04

Decide programme direction

T73, T74, T85, T86 / Portfolio, maturity and evidence

05

Close and sustain

X71, X72 / Independence, records and future support

GATE REVIEW

What should scale, adapt or stop? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

BASIS H01-H04 | Route selection is an original editorial aid

T61

TOOL

Coaching dashboard specification

Define useful programme evidence without capturing session content.

Practical guide | Working form | Worked example

EXCEL TAB T61 Coaching dashboard specific

TIME 90-120 minute design workshop; specialist sign-off before build | OWNER Evaluation lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Start with each governance decision the dashboard must inform.

02 Define indicators, denominators, sources, owners and refresh frequency.

03 Set privacy-safe breakdowns, suppression rules and missing-data treatment.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Starting with available metrics instead of the decision question; Averaging results until poor alliance, harm or inequity disappears; Publishing indicators without definitions, thresholds or accountable responses.

CONTINUE THE METHOD

04 Attach thresholds and fix, adapt, scale, pause or stop responses.

05 Prototype with decision users and remove any metric that changes no decision.

BOUNDARY & CAUTION

The dashboard must never expose individual session content or unsafe small-group results merely because data are available.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.238

T61

TOOL

Coaching dashboard specification

Define useful programme evidence without capturing session content.

Practical guide | **Working form** | Worked example

EXCEL TAB T61 Coaching dashboard specific

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

KPI / decision	Definition / formula	Population / source	Cadence / owner	Threshold	Current / trend	Action

T61

TOOL

Coaching dashboard specification

Define useful programme evidence without capturing session content.

Practical guide | Working form | Worked example

EXCEL TAB T61 Coaching dashboard specific

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Question Decision the dashboard supports	Are participants applying agreed behaviours safely and usefully in real project decisions?
Indicator Definition and formula	Participants evidencing application in two work moments, divided by participants reaching midpoint.
Source System or respondent	Coachee-approved application log and behaviour-only observer checklist; no session content collected.
Frequency Collection/reporting cadence	Monthly operational update, quarterly decision review and immediate escalation for protected concerns.
Breakdown Safe population cuts	Portfolio and pathway where groups exceed privacy threshold; access barriers reported separately.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T62

TOOL

Experience and alliance pulse

Detect contracting, fit and usefulness issues early.

Practical guide | Working form | Worked example

EXCEL TAB T62 Experience and alliance pul

TIME 3-5 minutes; 15-30 minutes for repair if needed | OWNER Programme owner

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Brief participants on purpose, response access and available repair routes.

02 Collect clarity, safety, fit, challenge and relevance with optional comment.

03 Review item distributions and flag any low score without relying on averages.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Relying on the overall average while ignoring any 1-2 rating; Promising anonymity that a small cohort cannot genuinely provide; Sharing identifiable responses outside the agreed repair and concern routes.

CONTINUE THE METHOD

04 Offer coach-led repair, no-fault rematch or an independent concern route.

05 Track protected patterns, action taken and whether the experience improves.

BOUNDARY & CAUTION

The pulse is a quality signal, not a performance rating or guarantee of anonymity in a small cohort.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / EDITION NOTE

Eight source statements retained. Single-choice responses and stable IDs added. The source's five-label example is replaced by an original eight-item fictional example; no composite psychological score is created.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.241

T62

TOOL

Experience and alliance pulse

Detect contracting, fit and usefulness issues early.

Practical guide | **Working form** | Worked example

EXCEL TAB T62 Experience and alliance pul

Choose one response per item: 1 strongly disagree; 2 disagree; 3 neither; 4 agree; 5 strongly agree; N/A not applicable. Blank means missing. No overall psychological score.

Stable ID / statement	Response 1-5 or N/A	Optional evidence / comment
E01 | I understood the purpose and information boundaries.		
E02 | I could raise what mattered to me.		
E03 | The coach and I agreed what useful work involved.		
E04 | The coach helped me see the issue differently.		
E05 | I retained ownership of decisions and action.		
E06 | Coaching connected to meaningful work.		
E07 | I tested relevant action between sessions.		
E08 | I know how to raise a concern or request a rematch.		

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T62

TOOL

Experience and alliance pulse

Detect contracting, fit and usefulness issues early.

Practical guide | Working form | Worked example

EXCEL TAB T62 Experience and alliance pul

NEW FICTIONAL EXECUTIVE EPISODE

Record / prompt	Illustrative entry
E01 | I understood the purpose and information boundaries.	4 - Purpose was clear; M-07 asked for one example of sponsor reporting.
E02 | I could raise what mattered to me.	4 - Relevant work could be raised without compulsory personal disclosure.
E03 | The coach and I agreed what useful work involved.	3 - The goal was revised after a system barrier became clearer.
E04 | The coach helped me see the issue differently.	4 - A different interpretation of late evidence was explored.
E05 | I retained ownership of decisions and action.	5 - The coachee chose and adapted the experiment.
E06 | Coaching connected to meaningful work.	4 - The practice concerned actual gate decisions.
E07 | I tested relevant action between sessions.	3 - One practice was delayed by travel and workload.
E08 | I know how to raise a concern or request a rematch.	4 - The no-fault rematch route was understood.

WHAT THE COACH SHOULD NOTICE

The example keeps the work situation, evidence, interpretation and next action distinct. Its conclusion is provisional. The coachee owns the choice; other people retain their authority and the right to a different view.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T62 / PARTICIPANT VERSION

Your coaching experience

Eight retained source statements in a fixed mixed order. Use the stable IDs when recording responses.

For this engagement and review period: 1 strongly disagree; 2 disagree; 3 neither agree nor disagree; 4 agree; 5 strongly agree; N/A not applicable. Leave blank only when unanswered. Choose one response. This is developmental service feedback, not a validated psychological scale.

ID	Statement	One response	Optional comment
E05	I retained ownership of decisions and action.		
E02	I could raise what mattered to me.		
E08	I know how to raise a concern or request a rematch.		
E04	The coach helped me see the issue differently.		
E01	I understood the purpose and information boundaries.		
E07	I tested relevant action between sessions.		
E03	The coach and I agreed what useful work involved.		
E06	Coaching connected to meaningful work.		

BASIS H04 T62 | Statement wording retained; order and response layout adapted

Read the pattern. Do not invent a verdict.

The eight statements concern experience and practice conditions. They are not interchangeable indicators of one validated latent trait.

Coding and coverage

Record E01-E08 in their stable order, irrespective of the participant version used. Valid numeric responses are 1-5. N/A is not applicable; a blank is missing. Neither is zero. Report the number of valid, N/A and missing responses. The workbook flags invalid values.

Individual interpretation

Show the item responses and the coachee's explanation. Do not create an overall alliance, readiness or psychological score. A response about concerns or autonomy may require a direct conversation even when the other items are positive.

Programme interpretation

Use an approved, privacy-protected collection process rather than combining private engagement workbooks. If a programme reports item percentages, use valid item responses as the denominator and state the count. Do not assume non-respondents had the same experience.

Illustrative arithmetic

If 12 people provide valid responses to one item and 9 select 4 or 5, the descriptive favourable proportion is 9/12 = 75%. If three other invitees did not answer, they are not included in that item denominator. State both response coverage and item counts. This is not a norm or success threshold.

Action before aggregation

Clarify confusing boundaries, address lack of opportunity and offer the concerns or rematch route where relevant. Do not use a favourable average to override a serious issue. Keep any formal complaint in the appropriate process.

Retest and learning

Use a review interval that matches the purpose. A changed response may reflect changed understanding or circumstances, not only improved coaching. Retain the wording, context and evidence and interpret change cautiously.

BASIS H01 / H04 T62 | Original coding instructions; no psychometric validation claimed

T63

TOOL

Goal progress review

Review progress using evidence and context, not impression alone.

Practical guide | Working form | Worked example

EXCEL TAB T63 Goal progress review

TIME 30-45 minutes at midpoint and closure | OWNER Coach + coachee

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Restate the goal, baseline and success scale without retrospective alteration.

02 Gather current behavioural evidence and the coachee's progress judgment.

03 Assign the agreed GAS level using its prewritten observable description.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Quietly changing the goal or scale after seeing weak progress; Applying goal-attainment ratings inconsistently across review points; Attributing every improvement to coaching despite material context changes.

CONTINUE THE METHOD

04 Examine context, support, unintended effects and credible alternative explanations.

05 Decide sustain, adapt, pause or close and set the next evidence point.

BOUNDARY & CAUTION

Goal progress is not proof of organisational impact or coaching causality and should be interpreted with contextual evidence.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.244

T63

TOOL

Goal progress review

Review progress using evidence and context, not impression alone.

Practical guide | **Working form** | Worked example

EXCEL TAB T63 Goal progress review

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Goal Defined goal	
Baseline Starting point	
Current Current evidence	
GAS -2 to +2 rating with rationale	
Context Other influences	
Learning What helped or hindered	
Decision Continue, adapt, close or refer	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T63

TOOL

Goal progress review

Review progress using evidence and context, not impression alone.

Practical guide | Working form | Worked example

EXCEL TAB T63 Goal progress review

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal Defined goal	Use decision framing in three consecutive gates while maintaining constructive cross-functional participation.
Baseline Starting point	Criteria stated in one of five sampled gates; alternatives invited in none.
Current Current evidence	Full routine used in two of three gates; one urgent review omitted alternatives.
GAS -2 to +2 rating with rationale	+1: expected progress exceeded on clarity, with consistency under pressure still developing.
Context Other influences	Sponsor behaviour improved, while late commercial papers continue to restrict preparation time.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T64

TOOL

Behavioural evidence interview

Gather narrow stakeholder evidence with consent.

Practical guide | Working form | Worked example

EXCEL TAB T64 Behavioural evidence interv

TIME 30-45 minutes plus coding and quality review | OWNER Evaluator/coach as agreed

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Define one target behaviour and the interview's authorised evidence use.

02 Ask for a specific recent example, then establish context and role.

03 Probe what changed, what remained stable and what evidence supports it.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Leading the interviewee toward the programme's preferred success story; Substituting hearsay or trait labels for a specific behavioural example; Claiming sustainability from a single low-pressure instance of change.

CONTINUE THE METHOD

04 Test alternative explanations and seek a negative or contrasting case.

05 Assess sustainability cautiously, code consistently and protect identifying detail.

BOUNDARY & CAUTION

Do not interview without informed consent or use developmental evidence for selection, discipline or diagnosis.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.247

T64

TOOL

Behavioural evidence interview

Gather narrow stakeholder evidence with consent.

Practical guide | Working form | Worked example

EXCEL TAB T64 Behavioural evidence interv

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Target behaviour What was agreed	
Example Specific observed situation	
Change Frequency, quality or impact	
Alternative Other factors affecting change	
Sustainability Likely under future pressure	
Support What the system should continue	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T64

TOOL

Behavioural evidence interview

Gather narrow stakeholder evidence with consent.

Practical guide | Working form | Worked example

EXCEL TAB T64 Behavioural evidence interv

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Target behaviour What was agreed	Invite and test contrary evidence before summarising a preferred investment option.
Example Specific observed situation	At Riverside Depot, the director reopened mobilisation risk after the sponsor signalled preference.
Change Frequency, quality or impact	Challenge now occurs before recommendation in two of three observed capital-project gates.
Alternative Other factors affecting change	A revised agenda and clearer authority may explain part of the observed improvement.
Sustainability Likely under future pressure	The behaviour persisted across eight weeks but remains untested during an emergency decision.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T65

TOOL

Contribution analysis

Judge how plausibly coaching contributed to observed outcomes.

Practical guide | Working form | Worked example

EXCEL TAB T65 Contribution analysis

TIME 2-4 hours after evidence preparation; independent challenge if high stakes | OWNER Evaluation lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Restate the programme theory from activity through mechanism to outcome.

02 Verify implementation quality, reach and material deviations before interpreting results.

03 Assemble evidence for observed results and each proposed mechanism.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Collecting only evidence that confirms the programme theory; Naming alternative explanations without investigating their plausibility; Converting a reasoned contribution judgment into a causal percentage.

CONTINUE THE METHOD

04 Investigate concurrent changes, rival explanations and negative cases.

05 Conclude contribution with confidence, limitations and the decision it informs.

BOUNDARY & CAUTION

Contribution analysis strengthens a reasoned explanation but cannot establish experimental causality or a precise attribution percentage.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.250

T65 Contribution analysis

TOOL

Judge how plausibly coaching contributed to observed outcomes.

Guide **Worksheet** Example LIVE WORKSHEET

Theory Expected change chain

Implementation What was actually delivered

Mechanisms Evidence that intended mechanisms occurred

Observed results Evidence by level

Alternatives Other explanations

Context Events helping or hindering

Confidence Low/medium/high with reason

Decision Scale, adapt, test or stop

Basis: H01 / H04 | H04 source p.250

T65 Contribution analysis

TOOL

Judge how plausibly coaching contributed to observed outcomes.

Guide Worksheet Example FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.

Theory Expected change chain

Coaching plus sponsor and workflow support improves framing, application and capital-decision quality.

Implementation What was actually delivered

Eleven started, ten reached midpoint; coaching quality met gates, one access adjustment was late.

Mechanisms Evidence that intended mechanisms occurred

Reflection, rehearsal, implementation intentions and protected work opportunities were reported as useful.

Observed results Evidence by level

Eight participants evidenced application; sampled gates showed clearer criteria and earlier challenge.

Alternatives Other explanations

New gate templates, sponsor modelling and portfolio stabilisation also plausibly influenced results.

Context Events helping or hindering

Not populated in the original worked extract.

Confidence Low/medium/high with reason

Not populated in the original worked extract.

Decision Scale, adapt, test or stop

Not populated in the original worked extract.

Basis: H01 / H04 | H04 source p.250

T66

TOOL

Cost-consequence analysis

Compare programme costs with multiple outcomes transparently.

Practical guide | Working form | Worked example

EXCEL TAB T66 Costconsequence analysis

TIME 60-90 minutes after cost and outcome definitions are validated | OWNER Finance + evaluation

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Set the decision perspective, period, population and comparison basis.

02 Calculate full cost, including time, operations, supervision and evaluation.

03 Report reach and quality alongside access, completion and adverse effects.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Omitting participant time, supervision, operations or evaluation from cost; Reporting starts without the eligible denominator, completion or access pattern; Monetising weakly evidenced outcomes while overlooking quality and adverse effects.

CONTINUE THE METHOD

04 Describe application and work consequences in their natural units.

05 Compare scenarios without aggregating unlike outcomes or implying causality.

BOUNDARY & CAUTION

Keep unlike consequences visible in their own units; this analysis is not an ROI ratio or licence to double-count value.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.253

T66

TOOL

Cost-consequence analysis

Compare programme costs with multiple outcomes transparently.

Practical guide | Working form | Worked example

EXCEL TAB T66 Costconsequence analysis

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Cost Direct, internal and opportunity costs	
Reach Eligible, started and completed	
Quality Experience and assurance outcomes	
Application Behaviour/practice evidence	
Work outcomes Relevant indicators	
Equity Distribution of access and benefit	
Uncertainty Range and assumptions	
Decision Comparative value judgment	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T66

TOOL

Cost-consequence analysis

Compare programme costs with multiple outcomes transparently.

Practical guide | Working form | Worked example

EXCEL TAB T66 Costconsequence analysis

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Cost Direct, internal and opportunity costs	Full pilot cost was GBP 96,400, including participant time, supervision, operations and evaluation.
Reach Eligible, started and completed	Eleven of twelve eligible directors started; ten reached midpoint and one deferred voluntarily.
Quality Experience and assurance outcomes	Alliance met threshold; one accessibility delay required correction and no substantiated complaints arose.
Application Behaviour/practice evidence	Eight participants evidenced repeated use in agreed work moments by the 90-day review.
Work outcomes Relevant indicators	Gate clarity improved and six rework events were avoided, with causal contribution uncertain.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T67

TOOL

Responsible ROI estimator

Model a financial range without hiding assumptions.

Practical guide | Working form | Worked example

EXCEL TAB T67 Responsible ROI estimator

TIME 90-120 minutes; independent review for public or investment claims | OWNER Finance/evaluation

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Confirm the decision and whether a financial ratio will add useful evidence.

02 Validate outcome quantity, unit value, period and counterfactual separately.

03 Calculate gross value transparently and reconcile it with full programme cost.

CONTINUE THE METHOD

04 Set low, base and high contribution assumptions after testing alternatives.

05 Apply an explicit confidence adjustment for design and data quality.

06 Present net benefit, ROI sensitivity, non-monetised outcomes and claim limits together.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Calling gross benefit ROI before subtracting full programme cost; Double-counting linked delay, rework and productivity benefits; Presenting one attribution estimate with unjustified decimal precision.

BOUNDARY & CAUTION

Use ROI only where outcome quantity and value are credible; never monetise trust, wellbeing or avoided harm speculatively.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / EDITION NOTE

The source estimator is retained as a sensitivity scenario only. Contribution and confidence factors are judgemental assumptions, not measured causal attribution or probabilities. Cost-consequence reporting is usually the safer primary account.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.256

T67

TOOL

Responsible ROI estimator

Model a financial range without hiding assumptions.

Practical guide | Working form | Worked example

EXCEL TAB T67 Responsible ROI estimator

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Component	Low	Base	High	Evidence / assumption
Measured gross outcome value				
Contribution proportion				
Confidence adjustment				
Scenario-adjusted benefit = gross x contribution x confidence				
Full programme cost				
Net benefit				
Scenario ROI				

T67

TOOL

Responsible ROI estimator

Model a financial range without hiding assumptions.

Practical guide | Working form | Worked example

EXCEL TAB T67 Responsible ROI estimator

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Outcome quantity Measured change	Six fewer decision-paper rework events than the matched prior-period portfolio pattern.
Unit value Defensible financial value	Finance estimates GBP 7,000 staff and delay cost per comparable rework event.
Gross value Quantity x unit value	Illustrative gross value is GBP 42,000 before any coaching contribution or confidence adjustment.
Attribution % plausibly due to coaching	Base case assigns 30% contribution after considering template and sponsor changes.
Confidence Evidence adjustment	Apply 0.65 for limited comparison quality and retain low/base/high sensitivity scenarios.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T68

TOOL

Coach quality scorecard

Review competence, conduct and contribution using multiple evidence sources.

Practical guide | Working form | Worked example

EXCEL TAB T68 Coach quality scorecard

TIME 60-90 minutes per coach after evidence review | OWNER Quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Define the coach role, authorised scope and complexity before reviewing evidence.

02 Gather observed practice plus supervision, audit, case and participant evidence.

03 Rate contracting, practice, ethics, inclusion and application against behavioural anchors.

CONTINUE THE METHOD

04 Apply ethics, competence and confidentiality gates before calculating any profile.

05 Calibrate assessors, record examples and agree developmental feedback with the coach.

06 Decide authorise, condition, restrict, develop, pause or remove with review date.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Averaging an ethics or confidentiality failure against stronger practice scores; Using credentials and biography as substitutes for observed competence; Allowing one uncalibrated assessor to make an unrestricted authorisation decision.

BOUNDARY & CAUTION

A periodic scorecard does not replace immediate complaint, incident, competence or safeguarding action when a gate fails.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.259

T68

TOOL

Coach quality scorecard

Review competence, conduct and contribution using multiple evidence sources.

Practical guide | Working form | Worked example

EXCEL TAB T68 Coach quality scorecard

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Criterion	1 Below	2 Developing	3 Meets	4 Exceeds	Observed evidence / risk
Ethics and boundaries					
Contracting					
Trust and presence					
Listening					
Awareness / challenge					
Choice and action					
Context / system					
Inclusion / access					
Transfer					
Reflection / supervision					

T68

TOOL

Coach quality scorecard

Review competence, conduct and contribution using multiple evidence sources.

Practical guide | Working form | Worked example

EXCEL TAB T68 Coach quality scorecard

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Contracting Audit/feedback evidence	Rated 4: clarified sponsor purpose, confidentiality, technology and re-contracting in observed practice.
Practice Observed competence	Rated 3: strong listening and challenge; occasionally moved from insight to action too quickly.
Ethics Incidents, consultation and compliance	Gate met: refused a sponsor request for content and used supervision appropriately.
Inclusion Access and coachee experience	Rated 3: adapted materials promptly, but initial screen-reader check should occur earlier.
Application Goal/experiment evidence	Rated 4: consistently connected insight to safe, observable capital-project work experiments.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T69

TOOL

Supervision record

Structure reflective supervision without unnecessary identifying detail.

Practical guide | Working form | Worked example

EXCEL TAB T69 Supervision record

TIME 30-60 minutes monthly; rapid consultation for material dilemmas | OWNER Coach + supervisor

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Frame one practice question and remove case detail not needed to explore it.

02 Describe relevant context, complexity, power and the coach's actual response.

03 Identify ethical duties, boundaries, unknowns and any need for rapid action.

CONTINUE THE METHOD

04 Generate competing hypotheses rather than treating one interpretation as fact.

05 Agree a next practice response, consultation and evidence for review.

06 Store the minimum supervision record under the approved access schedule.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

BOUNDARY & CAUTION

The supervision record is not the participant case file and should contain no unnecessary identifying or session detail.

COMMON ERRORS TO AVOID

Recording names or project detail unnecessary for the supervision question; Turning supervision into unqualified legal or operational decision advice; Generating hypotheses without testing them or reviewing the coach's response.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.262

T69

TOOL

Supervision record

Structure reflective supervision without unnecessary identifying detail.

Practical guide | **Working form** | Worked example

EXCEL TAB T69 Supervision record

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Supervision focus	Reflective notes - de-identified and minimum necessary
Contract and context	
Coach response / use of self	
Power, identity and system	
Ethical / boundary question	
Alternative hypotheses	
Learning and action	
Consult / escalate / refer	
Follow-up review	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T69

TOOL

Supervision record

Structure reflective supervision without unnecessary identifying detail.

Practical guide | Working form | Worked example

EXCEL TAB T69 Supervision record

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Practice question What needs reflection	How can I challenge avoidance without taking over the director's project decision?
Context Minimum non-identifying information	Coachee repeatedly postpones sponsor dialogue despite a time-critical decision-right ambiguity.
Coach response Thoughts, feelings and use of self	Reflected the pattern, checked consent to challenge and explored one bounded rehearsal.
Ethics Code, boundaries and power	Maintain autonomy, avoid operational advice and escalate only through agreed risk exceptions.
Hypotheses Alternative formulations	Fear of sponsor retaliation, unclear authority or reasonable concern about incomplete evidence.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T70

TOOL

Ethical decision record

Make a transparent, proportionate decision in a dilemma.

Practical guide | Working form | Worked example

EXCEL TAB T70 Ethical decision record

TIME 30-60 minutes; immediate consultation where urgency requires | OWNER Coach/quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Record facts, unknowns, urgency, affected parties and practitioner authority.

02 Identify relevant codes, contracts, rights, policies and competence limits.

03 Name competing values and harms arising from action and inaction.

CONTINUE THE METHOD

04 Generate options and obtain qualified consultation where the issue requires it.

05 Choose the least intrusive adequate action and minimum necessary disclosure.

06 Communicate, document, arrange continuity and review the outcome for system learning.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Completing the record afterwards merely to justify an intuitive decision; Treating the framework as a substitute for qualified legal or clinical advice; Disclosing more information than the chosen protective action requires.

BOUNDARY & CAUTION

This record structures ethical reasoning but does not provide legal, clinical, safeguarding or regulatory determination.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.265

T70

TOOL

Ethical decision record

Make a transparent, proportionate decision in a dilemma.

Practical guide | **Working form** | Worked example

EXCEL TAB T70 Ethical decision record

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Decision step	Working record
Facts, unknowns, urgency and parties	
Law / policy / code / contract	
Values, rights, power and possible harms	
Options and consultation	
Decision, authority and minimum disclosure	
Communication and continuity	
Outcome, review and system learning	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T70

TOOL

Ethical decision record

Make a transparent, proportionate decision in a dilemma.

Practical guide | Working form | Worked example

EXCEL TAB T70 Ethical decision record

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Issue Facts and uncertainty	Sponsor requested themes that could reveal one director's confidential account of gate pressure.
Parties Rights, needs and power	Coachee, coach, sponsor, programme owner and colleagues potentially identifiable in a small cohort.
Standards Contract, code, law and policy	Three-way contract, confidentiality policy, data-minimisation duty and applicable professional ethics code.
Options Possible actions	Decline, provide safely aggregated themes later, seek coachee permission or obtain independent advice.
Consequences Benefit, harm and reversibility	Disclosure risks trust and identification; refusal requires a useful system-level alternative.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T71

TOOL

Incident and complaint pathway

Respond fairly, promptly and without retaliation.

Practical guide | Working form | Worked example

EXCEL TAB T71 Incident and complaint path

TIME Immediate protection; triage within SLA; duration stated case by case | OWNER Quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Receive the concern accessibly, check immediate safety and prevent retaliation.

02 Acknowledge receipt, explain confidentiality limits, timing and available support.

03 Triage severity, route, investigator competence, independence and conflicts.

CONTINUE THE METHOD

04 Gather minimum relevant evidence while preserving fairness and updates.

05 Decide findings, remedy, provider or coach action and review rights.

06 Verify completion and analyse protected trends without exposing the complainant.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Routing a complaint solely through the coach or provider being challenged; Delaying immediate protection until the full investigation has concluded; Omitting non-retaliation, conflict checks, updates and review rights.

BOUNDARY & CAUTION

Do not use the routine complaint pathway for emergencies; activate the named urgent or statutory route immediately.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.268

T71

TOOL

Incident and complaint pathway

Respond fairly, promptly and without retaliation.

Practical guide | **Working form** | Worked example

EXCEL TAB T71 Incident and complaint path

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Concern / complaint ID	Received / ack	Immediate protection	Triage / conflict	Investigator / SLA	Outcome / remedy	Review / closed

T71

TOOL

Incident and complaint pathway

Respond fairly, promptly and without retaliation.

Practical guide | Working form | Worked example

EXCEL TAB T71 Incident and complaint path

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Concern What was reported	Participant reports repeated pressure from a coach to share private assessment results with management.
Immediate safety Protection needed	No urgent danger identified; pause coach contact and preserve an alternative support route.
Acknowledgement Timing and contact	Independent case manager confirms receipt within one working day and explains protection.
Route Informal resolution, investigation or external referral	Formal complaint review with consent-based evidence gathering and a stated ten-day update.
Independence Conflict-free decision maker	Reviewer sits outside the coaching provider and has no reporting relationship to the sponsor.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T72

TOOL

AI coaching assurance checklist

Test AI coaching across ethics, experience, safety and technical controls.

Practical guide | Working form | Worked example

EXCEL TAB T72 AI coaching assurance check

TIME Half-day review plus scenario testing; repeat after material change | OWNER Product + privacy + quality

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Freeze the approved use case, population, version, claims and prohibited tasks.

02 Test disclosure, comprehension, meaningful choice and an equivalent human alternative.

03 Verify data flows, security, retention, deletion and model-training restrictions.

CONTINUE THE METHOD

04 Run bias and accessibility tests across representative language and identity variants.

05 Challenge safety boundaries with clinical, legal, employment and dependency scenarios.

06 Record release conditions, accountable monitoring and material-change retest triggers.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

BOUNDARY & CAUTION

Checklist completion is not proof that an AI service is safe, effective or suitable for every user or context.

COMMON ERRORS TO AVOID

Accepting a vendor marketing claim as the approved use case; Allowing model, prompt or data changes without regression testing; Calling participation voluntary when no equivalent human route exists.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.271

T72

TOOL

AI coaching assurance checklist

Test AI coaching across ethics, experience, safety and technical controls.

Practical guide | Working form | Worked example

EXCEL TAB T72 AI coaching assurance check

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Assurance domain	Test cases / evidence	Threshold	Pass / condition / fail	Action / owner
Use case and exclusions				
Disclosure and user choice				
Privacy and deletion				
Security and subprocessors				
Safety / boundary scenarios				
Bias / language / accessibility				
Coaching quality and evidence				
Human oversight / complaint				
Employment-use prohibition				
Version / change / continuity				

T72

TOOL

AI coaching assurance checklist

Test AI coaching across ethics, experience, safety and technical controls.

Practical guide | Working form | Worked example

EXCEL TAB T72 AI coaching assurance check

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Use case Approved purpose and population	Optional AI reflection assistant drafts questions after sessions; it never gives project decisions.
Disclosure User understanding and choice	Users see the AI role, limitations, version and human alternative before first use.
Privacy Data, logs, training and deletion	No session transcript, special-category data, model training or employment reuse is permitted.
Bias Language/group tests	Test prompts across language, disability and cultural-expression variants; investigate differential failure rates.
Safety Boundary and escalation scenarios	Crisis, legal, employment and high-stakes project prompts trigger boundaries and qualified human routes.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T73

TOOL

Quarterly portfolio review

Turn evidence into scale, adapt and stop decisions.

Practical guide | Working form | Worked example

EXCEL TAB T73 Quarterly portfolio review

TIME 90-120 minutes quarterly after protected pack review | OWNER Coaching governance board

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Reconfirm strategic fit and whether coaching remains the right intervention.

02 Examine demand, reach, completion, access and unmet need by safe segments.

03 Review coach quality, alliance, complaints, incidents and corrective actions.

CONTINUE THE METHOD

04 Test application evidence and the organisational conditions enabling transfer.

05 Interpret outcomes, equity, cost and risks without unsupported attribution.

06 Make fix, adapt, scale, pause or stop decisions with owners and dates.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Celebrating demand and attendance as evidence of strategic value; Using averages that conceal a quality failure or access disparity; Scaling on outcome trends before confirming delivery and application.

BOUNDARY & CAUTION

The board should receive protected aggregate evidence and must not seek private content to explain a programme trend.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.274

T73

TOOL

Quarterly portfolio review

Turn evidence into scale, adapt and stop decisions.

Practical guide | Working form | Worked example

EXCEL TAB T73 Quarterly portfolio review

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Pathway / population	Delivery / access	Quality / alliance	Application / behaviour	Outcome / cost	Risk / equity	Decision + conditions

T73

TOOL

Quarterly portfolio review

Turn evidence into scale, adapt and stop decisions.

Practical guide | Working form | Worked example

EXCEL TAB T73 Quarterly portfolio review

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Strategic fit Priority and population	Pilot still supports reliable capital decisions; decision-right redesign remains a separate sponsor action.
Demand/reach Access and equity	Eleven of twelve started; one deferred voluntarily and no eligible group shows access disparity.
Quality Contract, fit, supervision and incidents	Alliance and coach-quality gates met; one accessibility delay has a named corrective owner.
Application Experiments and behaviour	Eight of ten midpoint participants evidenced repeated use in agreed project work moments.
Outcomes Goal and work evidence	Decision clarity trend improved; causal claims remain limited by concurrent workflow changes.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T74

TOOL

Maturity assessment

Assess organisational coaching capability against four evidence-gated levels.

Practical guide | Working form | Worked example

EXCEL TAB T74 Maturity assessment

TIME Half to one day annually; targeted re-rating after 90 days | OWNER Independent review team

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Form an independent cross-functional panel and define the assessment boundary.

02 Collect current evidence across purpose, programme, practice, protection and application.

03 Rate only the descriptor consistently achieved, recording variation and confidence.

CONTINUE THE METHOD

04 Apply ethics, data and complaints gates before any overall maturity conclusion.

05 Prioritise binding constraints by strategy, trust, transfer and risk impact.

06 Assign 90-day actions and re-rate changed dimensions with fresh evidence.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Rating future plans and policies as current operating maturity; Averaging protection failures into an apparently acceptable overall level; Producing an exhaustive improvement list without sequencing the binding constraints.

BOUNDARY & CAUTION

This is an internal improvement assessment, not accreditation, validation or a benchmark against unnamed organisations.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / EDITION NOTE

This edition uses H04 Appendix M: 1 Ad hoc, 2 Defined, 3 Integrated, 4 Adaptive. H03 uses different labels and an 80% rule; these are not combined here. Rate each dimension against its evidence anchor; do not calculate an overall level.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.277

T74

TOOL

Maturity assessment

Assess organisational coaching capability against four evidence-gated levels.

Practical guide | **Working form** | Worked example

EXCEL TAB T74 Maturity assessment

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Dimension	Level 1-4 or N/O	Evidence / confidence	Critical gap / exception	90-day action / owner
Strategic purpose				
Leadership sponsorship				
Portfolio design				
Access and inclusion				
Contracting				
Coach capability				
Matching				
Supervision				
Manager ecosystem				
Application				
Measurement				
Data and privacy				
AI and technology				
Ethics and complaints				
Supplier management				
Continuous improvement				

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T74

TOOL

Maturity assessment

Assess organisational coaching capability against four evidence-gated levels.

Practical guide | Working form | Worked example

EXCEL TAB T74 Maturity assessment

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose Strategic alignment evidence	Level 3: approved use cases connect strategy, evidence, alternatives and explicit exclusion routes.
Programme Pathways and operations	Level 2: pilot operations are repeatable, but capacity and equity evidence remain incomplete.
Practice Capability and supervision	Level 3: observed competence, supervision and alliance repair operate consistently across approved coaches.
Protection Ethics, equity, data and AI	Level 3 gate met: contracts, concerns and data routes tested; one access control improved.
Application Transfer environment	Level 2: transfer planning is standard, although manager support varies by portfolio.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 1 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
Strategic purpose	Coaching is purchased case by case with no common rationale.	A charter names priority uses and exclusions.	Portfolio choices are linked to capability and workforce priorities.	Investment is dynamically reallocated using strategy, outcomes and risk evidence.
Leadership sponsorship	Support depends on individual advocates.	A sponsor is named and briefed on boundaries.	Leaders model learning and act on aggregate system themes.	The executive team governs coaching as a strategic capability.
Portfolio design	Offers overlap and populations are unclear.	Pathways, populations and modes are documented.	Demand, need, complexity, equity and cost shape an integrated portfolio.	Scenario planning and evidence drive continuous portfolio optimisation.
Access and inclusion	Access follows status, networks or manager preference.	Published criteria and basic adjustments exist.	Access, experience and outcomes are reviewed across relevant groups.	Inclusive design, differentiated pathways and barrier removal are embedded.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained

Coaching-system maturity: 2 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
Contracting	Purpose and confidentiality are informal or inconsistent.	Minimum four-way contracting and information protocols are used.	Contract quality is audited and re-contracting is routine.	Contracting practice anticipates complex sponsorship, technology and system work.
Coach capability	Selection is based mainly on biography or availability.	Training/credentials and references are checked.	Observed competence, scope and development are role-specific.	Capability is calibrated, researched and renewed across a professional faculty.
Matching	An administrator assigns the next available coach.	Basic need, preference and conflict checks operate.	Choice, chemistry, complexity and rematch evidence inform matching.	Matching quality is evaluated and improved without intrusive profiling.
Supervision	Supervision is absent or optional.	Minimum cadence and a qualified route are defined.	Risk-proportionate individual/group supervision and rapid consultation operate.	Supervision insight strengthens practice and system learning while preserving confidentiality.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 3 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
Manager ecosystem	Managers confuse coaching with telling or hidden assessment.	Managers receive boundary and conversation guidance.	Coaching behaviours, feedback, opportunity and performance clarity reinforce transfer.	Leaders consistently combine coaching, direction and accountability with role clarity.
Application	Success is attendance or session satisfaction.	Goals and actions are recorded.	Work experiments, stakeholder support and follow-up are designed into pathways.	Transfer climate and system barriers are actively managed using behavioural evidence.
Measurement	Testimonials and participation dominate reporting.	Delivery, experience and goal progress are defined.	Behaviour, outcome, contribution, equity, cost and risk are triangulated.	Evaluation design is matched to decisions and supports credible comparative learning.
Data and privacy	Records, access and retention vary by coach/provider.	Minimum data rules and access controls are documented.	Lifecycle mapping, deletion tests and privacy review cover all pathways.	Privacy-preserving design and assurance adapt to emerging use and regulation.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained

T74 / SOURCE EVIDENCE ANCHORS

Coaching-system maturity: 4 of 4

Selected convention: H04 Appendix M. Rate demonstrated routine practice; N/O means not observed or insufficient evidence.

Dimension	1 / Ad hoc	2 / Defined	3 / Integrated	4 / Adaptive
AI and technology	Tools are adopted informally or hidden in platforms.	Approved use cases, disclosure and basic security review exist.	Bias, safety, accessibility, change and human oversight are tested.	Continuous technical and ethical assurance governs a transparent human-AI service portfolio.
Ethics and complaints	Issues depend on personal judgment and informal escalation.	A code, complaint route and urgent escalation process exist.	Dilemmas, incidents and complaint trends inform supervised improvement.	Ethical reasoning, simulations and independent review strengthen organisational trust.
Supplier management	Procurement focuses on price and coach profiles.	Minimum quality, data and service terms are contractual.	Performance, coach quality, continuity and evidence are reviewed jointly.	Supplier innovation is governed through outcomes, risk, interoperability and exit readiness.
Continuous improvement	Changes follow anecdotes or crises.	An annual review and action plan exist.	Quarterly evidence drives recorded fix/scale/adapt/stop decisions.	Learning cycles, experiments and external evidence continuously evolve the system.

HOW TO USE THE ANCHORS

Choose the level supported across the material service scope, with lower-level controls operating. Retain evidence, gaps and actions for each dimension. Do not calculate an overall average or import H03's different 80% progression convention. Serious ethics, privacy or complaints failures require action regardless of other ratings.

BASIS H04 Appendix M pp.406-409 | Original source descriptors retained

T77

TOOL

Coach selection and observed-practice rubric

Select coaches through evidence and observed judgment rather than biography alone.

Practical guide | Working form | Worked example

EXCEL TAB T77 Coach selection and observe

TIME 75-120 minutes per candidate plus calibration | OWNER Practice lead + trained assessors

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Freeze role-specific criteria, anchors, weights and mandatory gates before selection.

02 Use the same case, observed sample and evidence instructions for candidates.

03 Observe contracting, relationship, inquiry, challenge, action, context and ethics.

CONTINUE THE METHOD

04 Have assessors rate independently and record behaviour supporting each score.

05 Calibrate differences and examine every risk flag before the decision.

06 Decide, feedback, retain minimum evidence and schedule reassessment where conditional.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

BOUNDARY & CAUTION

Selection scores cannot override a mandatory gate, unresolved conflict or missing evidence of authorised competence.

COMMON ERRORS TO AVOID

Scoring personal style similarity instead of role-relevant coaching behaviour; Changing criterion weights after assessors see candidate performance; Averaging a safeguarding, ethics or confidentiality red flag into the total.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.280

T77

TOOL

Coach selection and observed-practice rubric

Select coaches through evidence and observed judgment rather than biography alone.

Practical guide | Working form | Worked example

EXCEL TAB T77 Coach selection and observe

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Criterion	1 Below	2 Developing	3 Meets	4 Exceeds	Observed evidence / risk
Ethics and boundaries					
Contracting					
Trust and presence					
Listening					
Awareness / challenge					
Choice and action					
Context / system					
Inclusion / access					
Transfer					
Reflection / supervision					

T77

TOOL

Coach selection and observed-practice rubric

Select coaches through evidence and observed judgment rather than biography alone.

Practical guide | Working form | Worked example

EXCEL TAB T77 Coach selection and observe

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Criterion Contracting, ethics, listening, awareness, challenge, action, system, inclusion	Maintains coachee autonomy while challenging avoidance in a sponsor-pressure scenario.
Evidence source Application, case, observed session, references	Twenty-minute observed coaching sample, structured case response and supervision example.
Rating 1 below / 2 developing / 3 meets / 4 exceeds	3 of 4: consistent practitioner behaviour with one missed check on access preference.
Behavioural evidence What assessors observed	Named the power dynamic, sought permission to challenge and returned choice to coachee.
Risk flag Boundary or conduct concern	No ethical gate failure; require accessibility refresher before first Meridian assignment.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T79

TOOL

Supervision standard and cadence

Define supervision purpose, frequency, competence, records and escalation across the coaching service.

Practical guide | Working form | Worked example

EXCEL TAB T79 Supervision standard and ca

TIME 90-minute design review; reassess after incident or scope change | OWNER Practice lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Segment coach groups by role, competence, caseload and assignment complexity.

02 Set minimum individual and group cadence, increasing support where risk rises.

03 Specify supervisor competence, independence, capacity and conflict controls.

CONTINUE THE METHOD

04 Define pseudonymisation, record access and case-detail protection requirements.

05 Publish rapid consultation triggers, contacts, response times and fallback routes.

06 Audit attendance, themes and corrective action without accessing session content.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Applying one cadence irrespective of caseload, competence or case complexity; Using a supervisor with unresolved commercial or line-management conflicts; Sharing recognisable participant detail in group supervision.

BOUNDARY & CAUTION

Published cadence is a minimum; emerging risk, novice practice or complex cases may require more or different supervision.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.283

T79

TOOL

Supervision standard and cadence

Define supervision purpose, frequency, competence, records and escalation across the coaching service.

Practical guide | Working form | Worked example

EXCEL TAB T79 Supervision standard and ca

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Coach group / scope	Complexity / caseload	Individual cadence	Group cadence	Supervisor standard	Rapid route	Evidence / response

T79

TOOL

Supervision standard and cadence

Define supervision purpose, frequency, competence, records and escalation across the coaching service.

Practical guide | Working form | Worked example

EXCEL TAB T79 Supervision standard and ca

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Coach group Role, complexity and caseload	Six authorised coaches supporting project directors across three capital-investment portfolios.
Minimum cadence Individual/group frequency and duration	Individual supervision monthly and after six delivery hours, whichever occurs first.
Supervisor standard Competence and independence	Accredited, independent practitioner experienced in organisational, ethical and sponsor-system complexity.
Case protection De-identification and consent rules	Use pseudonyms and minimum context; never upload client details to unapproved systems.
Rapid consultation Route for urgent dilemmas	Same working day for ethical uncertainty; immediate named route for urgent safety concerns.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T80

TOOL

Coach authorisation, CPD and caseload record

Maintain current authorisation based on competence, supervision, capacity and conduct.

Practical guide | Working form | Worked example

EXCEL TAB T80 Coach authorisation CPD and

TIME 15-20 minutes quarterly; 45-60 minutes for reauthorisation | OWNER Practice lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Register each coach, authorised scope, restrictions and review date.

02 Link current observed-competence evidence to the capability framework.

03 Record role-relevant CPD and whether learning changed demonstrated practice.

CONTINUE THE METHOD

04 Verify supervision cadence, supervisor suitability and outstanding actions.

05 Review caseload, complexity, incidents, complaints and conditional requirements.

06 Authorise, condition, restrict, pause or end scope and notify operations.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

BOUNDARY & CAUTION

An up-to-date register supports control but is not, by itself, evidence that current practice remains competent.

COMMON ERRORS TO AVOID

Counting CPD hours as proof of current observed competence; Missing an expired condition, scope restriction or overdue review; Recording caseload without testing capacity against complexity and supervision.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.286

T80

TOOL

Coach authorisation, CPD and caseload record

Maintain current authorisation based on competence, supervision, capacity and conduct.

Practical guide | Working form | Worked example

EXCEL TAB T80 Coach authorisation CPD and

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Coach	Authorised scope	Observation	CPD	Supervision	Caseload	Incidents / conditions	Decision / review

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T80

TOOL

Coach authorisation, CPD and caseload record

Maintain current authorisation based on competence, supervision, capacity and conduct.

Practical guide | Working form | Worked example

EXCEL TAB T80 Coach authorisation CPD and

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Coach Identifier and role	A. Patel, external practitioner; authorisation record MIG-CO-014, reviewed by quality lead.
Authorised scope Population, complexity and modes	Project directors through moderate sponsor complexity; excludes clinical, mediation and formal employee cases.
Observed competence Date, method and outcome	Rated practitioner level on 12 May; ethics gate met and access condition completed.
CPD Learning linked to need	Nine hours on power, accessibility and team-system coaching since the previous review.
Supervision Cadence and current status	Monthly individual supervision current; next evidence review due 30 November.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T85

TOOL

Evaluation design and data-collection matrix

Match each evaluation question to a proportionate design, measure, source and decision.

Practical guide | Working form | Worked example

EXCEL TAB T85 Evaluation design and datac

TIME Half-day design; specialist review for experimental or linked data | OWNER Evaluation lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Write each evaluation question as a decision the evidence will inform.

02 Map outcomes and mechanisms from the programme theory of change.

03 Define balanced indicators for delivery, application, equity, risk, cost and outcome.

CONTINUE THE METHOD

04 Specify source, method, timing, population, missingness and privacy controls.

05 Choose a design proportionate to the intended descriptive or causal claim.

06 Pre-set thresholds and responses, then pilot burden and comprehension before baseline.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Writing evaluation questions after seeing the available results; Measuring satisfaction while omitting mechanism, application, equity and risk; Adding privacy controls only after identifiable data have been collected.

BOUNDARY & CAUTION

Do not design evaluation after delivery begins if baseline, consent or comparison evidence is essential to the decision.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.289

T85

TOOL

Evaluation design and data-collection matrix

Match each evaluation question to a proportionate design, measure, source and decision.

Practical guide | Working form | Worked example

EXCEL TAB T85 Evaluation design and datac

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Decision question	Outcome / mechanism	Indicator / definition	Source / timing	Design	Privacy / quality	Threshold / decision

T85

TOOL

Evaluation design and data-collection matrix

Match each evaluation question to a proportionate design, measure, source and decision.

Practical guide | Working form | Worked example

EXCEL TAB T85 Evaluation design and datac

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision question What decision will the evidence inform?	Should Meridian expand, adapt or stop coaching after the next two cohorts?
Outcome/mechanism What is expected to change and why	Decision framing improves through reflection, rehearsal, workplace experiments and manager-enabled opportunity.
Indicator Operational definition	Repeated application rate, behaviour evidence, alliance, access, adverse events, cost and decision clarity.
Source/method Self, stakeholder, work data or qualitative evidence	Protected operations data, pulses, behaviour interviews, portfolio trend comparison and contribution analysis.
Timing Baseline, midpoint, close, follow-up	Baseline, early-session pulse, midpoint, closure, 90-day transfer and quarter-end decision review.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T86

TOOL

Aggregate themes and organisational action log

Convert legitimate cross-engagement themes into system action without exposing individual coaching content.

Practical guide | Working form | Worked example

EXCEL TAB T86 Aggregate themes and organi

TIME 60-90 minutes quarterly after protected theme preparation | OWNER Programme owner + sponsor

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Aggregate only recurring themes that meet the approved protection threshold.

02 Assess source diversity, evidence quality, confidence and meaningful exceptions.

03 Test whether wording, timing or segmentation could enable identification.

CONTINUE THE METHOD

04 Translate the protected theme into a plausible system implication.

05 Assign organisational action, owner, due date and success evidence.

06 Feed back the aggregate response and review whether the condition changes.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Reporting a specific theme that identifies a person or small team; Turning confidential learning into evidence for individual performance action; Logging an organisational issue without feedback, ownership or review.

BOUNDARY & CAUTION

Aggregate themes must never be reverse-engineered for individual employment action or disclosed below the protection threshold.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.292

T86

TOOL

Aggregate themes and organisational action log

Convert legitimate cross-engagement themes into system action without exposing individual coaching content.

Practical guide | Working form | Worked example

EXCEL TAB T86 Aggregate themes and organi

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Protected theme	Evidence / confidence	Aggregation / risk	System implication	Action	Owner / due	Feedbac k / review

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

T86

TOOL

Aggregate themes and organisational action log

Convert legitimate cross-engagement themes into system action without exposing individual coaching content.

Practical guide | Working form | Worked example

EXCEL TAB T86 Aggregate themes and organi

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Theme Minimum-threshold aggregate pattern	Late sponsor preference narrows challenge before capital-project options have been fully tested.
Evidence base Number, sources and confidence	Raised independently by nine participants across three coaches, with moderate confidence and no quotations.
Protection Aggregation/suppression and residual risk	Report only the cross-portfolio pattern; suppress workstream, identity and potentially revealing examples.
System implication Process, workload, capability, culture or policy	Gate design and sponsor behaviour may constrain the capability coaching seeks to strengthen.
Action Named organisational response	Investment governance lead revises chair guidance and tests recommendation-last agendas for one quarter.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T87

TOOL

Quality-assurance sampling plan

Define risk-based sampling of contracts, coach practice, data, experience, outcomes and incidents.

Practical guide | Working form | Worked example

EXCEL TAB T87 Qualityassurance sampling p

TIME 90-minute planning; sampling effort proportionate to risk | OWNER Quality lead

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Prioritise quality domains from mandatory standards, incidents and current risk.

02 Define the population and choose a method that answers the control question.

03 Set sample size and selection rationale, including high-risk and random elements.

CONTINUE THE METHOD

04 Write pass, exception and severity standards before reviewers see evidence.

05 Assign independent competent reviewers and protect participant information.

06 Record findings, corrective owners and follow-up testing to verify closure.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Selecting an easy sample that cannot detect the material quality risk; Reviewing private session content when process evidence would answer the question; Recording findings without severity, corrective action or follow-up verification.

BOUNDARY & CAUTION

Periodic sampling cannot replace continuous concern routes, incident response or mandatory review of every critical exception.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.295

T87

TOOL

Quality-assurance sampling plan

Define risk-based sampling of contracts, coach practice, data, experience, outcomes and incidents.

Practical guide | Working form | Worked example

EXCEL TAB T87 Qualityassurance sampling p

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Domain / population	Method	Sample / rationale	Standard / severity	Reviewer	Finding / action	Follow-u p

T87

TOOL

Quality-assurance sampling plan

Define risk-based sampling of contracts, coach practice, data, experience, outcomes and incidents.

Practical guide | Working form | Worked example

EXCEL TAB T87 Qualityassurance sampling p

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Quality domain Contract, practice, supervision, data, AI, outcome or supplier	Three-way contracting and information-boundary compliance across active individual coaching assignments.
Population What may be sampled	All 24 new contracts this quarter; session notes and private content are excluded.
Method Audit, observation, interview, test or data review	Independent document review against five controls, followed by factual owner clarification where needed.
Sample/rationale Size, stratification and risk basis	Review all contracts because the cohort is small and confidentiality is a mandatory gate.
Standard Pass criteria and severity	100% named information boundaries and exceptions; any absent consent pauses the assignment.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

T88

TOOL

Supplier/platform continuity and exit plan

Protect participants, records and service continuity during outage, supplier failure, contract end or material platform change.

Practical guide | Working form | Worked example

EXCEL TAB T88 Supplierplatform continuity

TIME 2-3 hour plan; annual exercise and post-change retest | OWNER Programme owner + procurement + technology

BRING Theory of change and evaluation questions | Minimum protected operational/outcome evidence | Standards, thresholds and decision authority

RUN THE ACTIVITY

01 Scenario-test outage, breach, acquisition, model change, insolvency and contract end.

02 Prioritise critical participant services, records, access needs and dependencies.

03 Set measurable triggers, invocation authority and specialist escalation contacts.

CONTINUE THE METHOD

04 Define alternative delivery, coach continuity and privacy-safe communication.

05 Contract data export, reconciliation, verified deletion and subprocessor obligations.

06 Exercise the plan, time recovery, remediate defects and retest material changes.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Assuming provider cooperation and system access will remain available after failure; Sending continuity messages that reveal participation or sensitive circumstances; Accepting a deletion promise without export reconciliation and verification.

BOUNDARY & CAUTION

A continuity plan is ineffective without enforceable data rights, offline contacts, tested alternatives and named invocation authority.

BETWEEN SESSIONS / HAND-OFF

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.298

T88

TOOL

Supplier/platform continuity and exit plan

Protect participants, records and service continuity during outage, supplier failure, contract end or material platform change.

Practical guide | Working form | Worked example

EXCEL TAB T88 Supplierplatform continuity

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Scenario / trigger	Critical service / data	Authority	Continuity action	Data return / deletion	Communication	Test / residual risk

T88

TOOL

Supplier/platform continuity and exit plan

Protect participants, records and service continuity during outage, supplier failure, contract end or material platform change.

Practical guide | Working form | Worked example

EXCEL TAB T88 Supplierplatform continuity

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Scenario Outage, breach, acquisition, model change, insolvency or exit	Provider platform unavailable for more than four hours during an active coaching week.
Critical service/data What must be protected	Upcoming sessions, participant contacts, accessibility settings, contracts and current concern routes.
Trigger/authority Who invokes the plan	Four-hour outage triggers continuity; service owner activates with privacy and technology leads.
Continuity action Alternative coach, channel or process	Move sessions to approved video, notify coaches and preserve the no-fault rescheduling option.
Data return/deletion Format, verification and timing	Provider exports records in agreed format within 24 hours and verifies residual deletion.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

BASIS H01 / H04 | All case examples are fictional, not client findings or benchmarks

X69

ACTIVITY

Anchored goal-attainment review

Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.

Practical guide | Working form | Worked example

EXCEL TAB X69 Anchored goalattainment rev

TIME 60 minutes

BRING Goal and anchors agreed before review | Work evidence | Coachee and authorised stakeholder perspectives

RUN THE ACTIVITY

01 Revisit the original goal, timeframe and five anchors from much less than expected to much more than expected. Do not rewrite the expected level merely to make the result favourable.

02 Check that evidence concerns the same behaviour, opportunity and conditions used when the anchors were set. Record changes in role or context separately.

03 Review work records, observations and the coachee's account. Keep disagreement visible and identify missing evidence rather than filling it with confidence.

QUESTIONS TO OPEN THINKING

What was expected before we saw the result?

Which evidence supports this anchor?

What else contributed to the change?

CONTINUE THE METHOD

04 Select the best-supported anchor for each goal or mark insufficient evidence. The number describes this goal and does not compare the executive with others.

05 Explore contribution: what coaching may have helped, what the coachee and others did, and what else changed. Do not claim causal attribution from a before-after score.

06 Decide retain, revise, extend or close the goal. Agree what may be shared and the next maintenance step.

BOUNDARY & CAUTION

These are individual developmental anchors, not clinical GAS norms or a psychometric T-score. Do not average unlike goals into a competence verdict.

BETWEEN SESSIONS / HAND-OFF

Assemble the agreed evidence and mark what is missing before the review rather than selecting a favourable rating first.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R26 | Original executive application

X69 Anchored goal-attainment review

ACTIVITY

Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.

Guide **Worksheet** Example LIVE WORKSHEET

FIVE-ANCHOR ATTAINMENT RAIL

THE ORIGINAL FIVE ANCHORS

-2	-1	0	+1	+2
Much less	Somewhat less	Expected	Somewhat more	Much more

Copy the pre-agreed descriptions before reviewing the evidence.

Ordinal anchors for one goal; do not average them into an overall leadership score.

01 Goal

02 Predefined expected level

03 Evidence

04 Attainment

05 Contribution and limits

06 Next decision

Basis: H01 / H04 / R26 | Original executive application

X69 Anchored goal-attainment review

ACTIVITY

Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.

FIVE-ANCHOR ATTAINMENT RAIL

THE ORIGINAL FIVE ANCHORS

-2	-1	0	+1	+2
Much less	Somewhat less	Expected	Somewhat more	Much more

Expected level achieved for this bounded goal.

Ordinal anchors for one goal; do not average them into an overall leadership score.

01 Goal

Use clear decision framing and invite challenge in two gate reviews.

02 Predefined expected level

At both reviews, state the question, hear decision-relevant concerns and close with owner and conditions.

03 Evidence

Two records and consented feedback show the sequence was used; one concern changed an approval condition.

04 Attainment

Expected level achieved for this bounded goal; no overall leadership score is inferred.

05 Contribution and limits

Rehearsal helped M-07's response, while earlier evidence and sponsor clarification also mattered.

06 Next decision

Retain the routine and review its usefulness after three further opportunities, without repeating the full assessment battery.

Basis: H01 / H04 / R26 | Original executive application

X70

ACTIVITY

Learning and contribution story

Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.

Practical guide | Working form | Worked example

EXCEL TAB X70 Learning and contribution s

TIME 60 minutes

BRING Original value hypothesis | Goal and experiment records | Relevant operational context and agreed sharing boundaries

RUN THE ACTIVITY

01 State the original question and the contribution coaching was expected to make. Separate programme participation from actual changes in practice.

02 Build a short evidence chain: conversation or rehearsal, chosen action, workplace application, observed consequence. Mark weak links and missing evidence.

03 Identify other influences, including support, resources, system changes and external events. Do not treat them as inconvenient noise to remove from the story.

QUESTIONS TO OPEN THINKING

What changed in work, not just in the conversation?

What else helped or hindered?

What is the strongest claim the evidence actually supports?

CONTINUE THE METHOD

04 Include what did not improve, what was stopped and any unintended effects. A useful evaluation can justify adaptation rather than expansion.

05 Choose a proportionate claim using language such as contributed to, was consistent with or remains uncertain where appropriate. Avoid unsupported financial attribution.

06 Prepare a coachee-approved summary for the relevant audience and retain private material separately. End with a decision and the evidence needed next.

BOUNDARY & CAUTION

Do not monetise confidence or assign an invented percentage of business improvement to coaching. Use transparent assumptions only in clearly labelled sensitivity scenarios.

BETWEEN SESSIONS / HAND-OFF

Draft a one-page account with evidence, alternative explanations, limits and the next decision; approve what may be shared.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H03 / H04 / R06 / R07 | Original executive application

X70 Learning and contribution story

ACTIVITY

Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.

Guide **Worksheet** Example LIVE WORKSHEET

CONTRIBUTION EVIDENCE CHAIN

Other influences: people, resources, timing, systems



Contribution is a reasoned claim, not proof of sole causation.

Keep weak links, alternative explanations, adverse effects and missing evidence visible.

01 Original hypothesis

02 Application evidence

03 Observed consequence

04 Other influences

05 Limits and adverse effects

06 Conclusion and decision

Basis: H01 / H03 / H04 / R06 / R07 | Original executive application

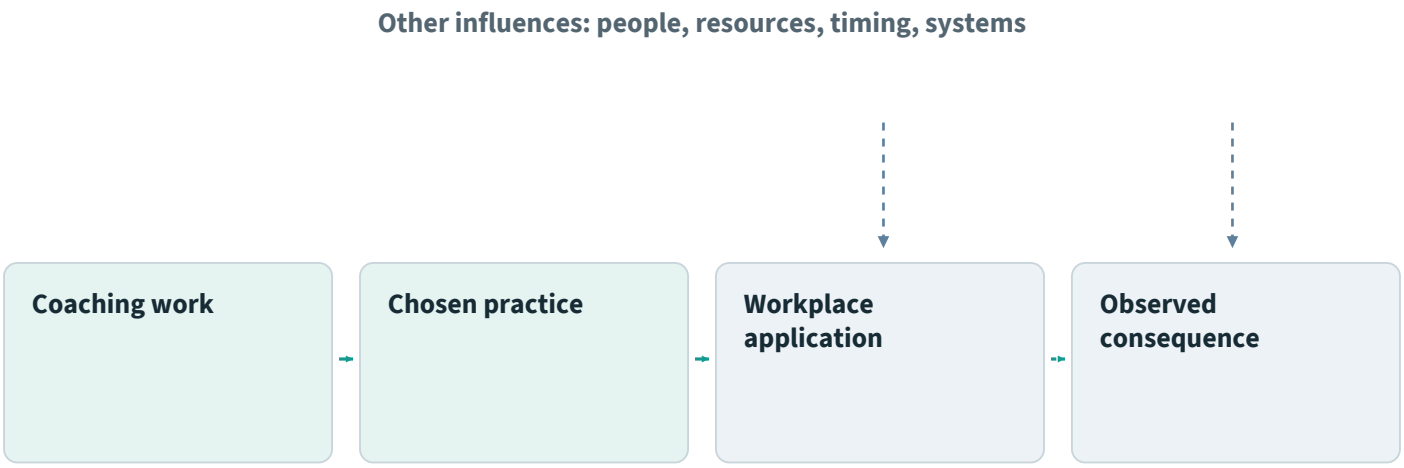
X70 Learning and contribution story

ACTIVITY

Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

CONTRIBUTION EVIDENCE CHAIN



Contribution is a reasoned claim, not proof of sole causation.

Keep weak links, alternative explanations, adverse effects and missing evidence visible.

01 Original hypothesis

Clearer contracting and rehearsal would help M-07 invite challenge and retain shared ownership at gates.

02 Application evidence

The new sequence was used in two meetings and one delegation checkpoint.

03 Observed consequence

A material concern surfaced before endorsement and the decision conditions were clearer.

04 Other influences

Earlier evidence circulation and sponsor clarification also enabled the change.

05 Limits and adverse effects

Preparation burden increased slightly and the supplier delay was not resolved.

06 Conclusion and decision

Coaching plausibly contributed to a useful practice change; retain the routine and address the supplier issue separately, without claiming a financial return.

Basis: H01 / H03 / H04 / R06 / R07 | Original executive application

X71

ACTIVITY

Six-month maintenance and self-coaching plan

Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.

Practical guide | Working form | Worked example

EXCEL TAB X71 Sixmonth maintenance and se

TIME 50 minutes

BRING Two or three practices worth retaining | Likely future pressures | Available peer, manager and professional support

RUN THE ACTIVITY

01 Identify the practices that have demonstrated value and the conditions that support them. Do not carry forward every exercise simply because it was completed.

02 For each practice, name the real-world cue and the evidence that it remains useful. Include a signal that the practice should be adapted or stopped.

03 Anticipate likely disruptions such as a role change, travel, workload or a new sponsor. Agree a proportionate response rather than a rigid maintenance promise.

QUESTIONS TO OPEN THINKING

What is genuinely worth sustaining?

What will tell you the context has changed?

When would you need different help rather than more of the same?

CONTINUE THE METHOD

04 Choose a light self-review rhythm and a willing support partner where helpful. Keep private reflection separate from organisational reporting.

05 Clarify when to seek further coaching, management action, technical advice or qualified health support. Continuing support should be based on need, not an assumption that closure is unsafe.

06 Write a six-month plan with no more than three commitments and a final review question about independence and value.

BOUNDARY & CAUTION

Maintenance is not a promise that difficulties will not return. Avoid dependency and do not replace appropriate specialist support with self-coaching.

BETWEEN SESSIONS / HAND-OFF

Put the first review in your own calendar and prepare a brief prompt you can use without the coach.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | Original executive application

X71 Six-month maintenance and self-coaching plan

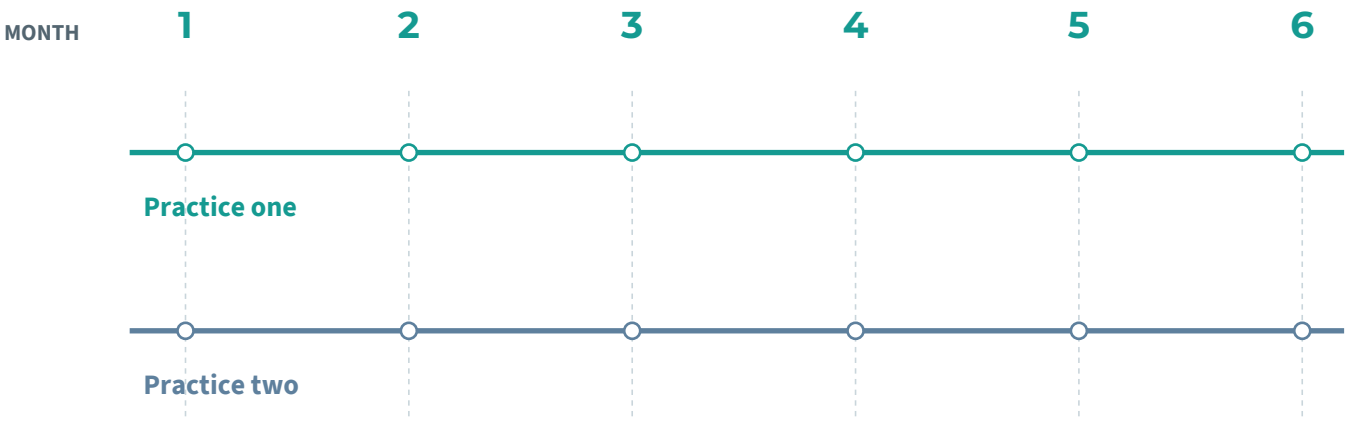
ACTIVITY

Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.

Guide **Worksheet** Example LIVE WORKSHEET

SIX-MONTH MAINTENANCE TIMELINE

SIX-MONTH HORIZON



Monthly reflection / drift signals / support / adapt or stop

No more than three commitments. Continuing coaching requires a defined need, not dependency.

01 Practice one

02 Practice two

03 Drift signals

04 Self-review rhythm

05 Support and escalation

06 Six-month decision

Basis: H01 / H04 | Original executive application

X71 Six-month maintenance and self-coaching plan

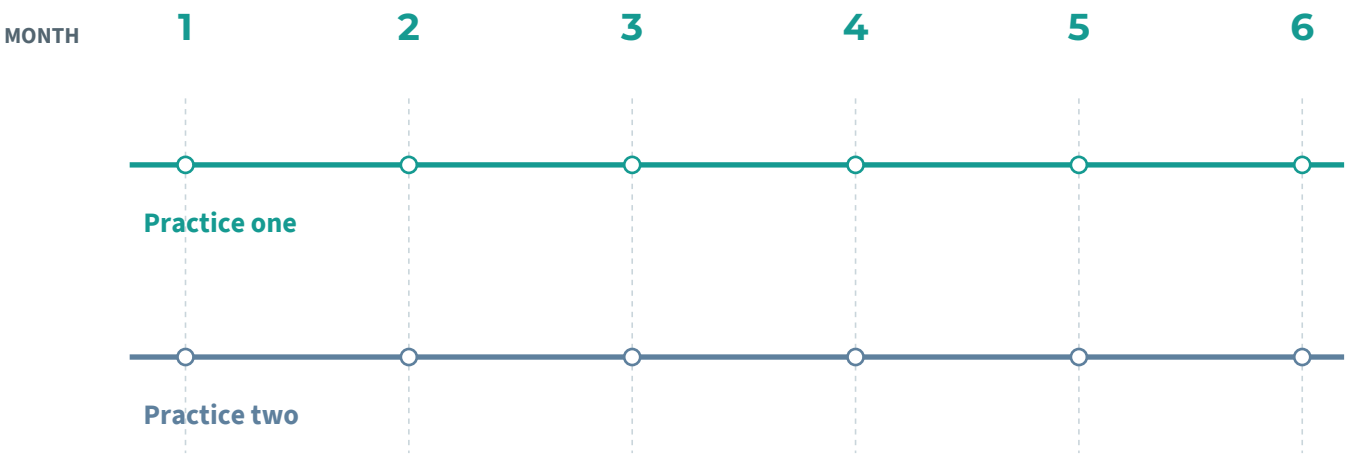
ACTIVITY

Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.

Guide Worksheet **Example** FICTIONAL WORKED EXAMPLE

SIX-MONTH MAINTENANCE TIMELINE

SIX-MONTH HORIZON



Monthly reflection / drift signals / support / adapt or stop

No more than three commitments. Continuing coaching requires a defined need, not dependency.

01 Practice one

Use a clear decision question and concerns-first opening at material gate reviews.

02 Practice two

Agree delegation authority, checkpoints and escalation before a routine recommendation.

03 Drift signals

Repeated take-backs, late surprise concerns or a new role mandate.

04 Self-review rhythm

A 15-minute monthly review of two episodes, with a peer check-in only by mutual agreement.

05 Support and escalation

Use the sponsor for authority issues, specialists for technical gaps and coaching for a new developmental question.

06 Six-month decision

Retain useful routines, adapt those that no longer fit and seek a new engagement only for a defined need.

Basis: H01 / H04 | Original executive application

X72

ACTIVITY

Closure conversation and future letter

End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.

Practical guide | Working form | Worked example

EXCEL TAB X72 Closure conversation and fu

TIME 60 minutes; 20-minute optional letter

BRING Contract and closure terms | Goal evidence | Agreed record retention and sponsor-review boundaries

RUN THE ACTIVITY

01 Revisit the original purpose and how it evolved. Invite the coachee to describe what was useful, unhelpful or unfinished without requiring a positive ending.

02 Review learning, application and limits using evidence. Distinguish achievement of a bounded goal from a broad claim about the person or business impact.

03 Discuss the ending itself: independence, unresolved concerns and appropriate future support. Do not use discomfort about ending to sell an unnecessary extension.

QUESTIONS TO OPEN THINKING

What should we acknowledge that did not work?

What can you now carry without this relationship?

What exactly ends today, and what remains owned elsewhere?

CONTINUE THE METHOD

04 Agree the permitted sponsor summary, record retention, deletion or return arrangements and any outstanding formal responsibilities.

05 Invite an optional letter to the future self describing a practice to retain, a warning sign and a compassionate restart instruction. The coachee may keep it entirely private.

06 Close with explicit next steps and no implied ongoing availability beyond the contract. A future engagement requires a new purpose and agreement.

BOUNDARY & CAUTION

Do not promise permanent outcomes or absolute confidentiality beyond applicable duties. Resolve complaints and necessary referrals through the appropriate route, not through a celebratory ending.

BETWEEN SESSIONS / HAND-OFF

Keep the optional letter privately and revisit it at the agreed self-review point.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R01 | Original executive application

X72 Closure conversation and future letter

ACTIVITY

End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.

01 Learning

02 Applied practice

Dear future me,

03 Unfinished work

04 Closure terms

06 Permitted summary

Basis: H01 / H04 / R01 | Original executive application

X72 Closure conversation and future letter

ACTIVITY

End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.

01 Learning

M-07 can separate evidence gaps, authority issues and personal responses more clearly.

02 Applied practice

Two gate routines and a delegation checkpoint were tested with useful, bounded evidence.

Dear future me,

When pressure returns, ask what decision is needed, what evidence is missing and whose authority applies before taking over.

03 Unfinished work

The supplier dependency remains with procurement; it is not disguised as a coaching failure or success.

04 Closure terms

End the six-session engagement; retain or delete records according to the verified contract and applicable requirements.

06 Permitted summary

Share the agreed practices, support needs and limits; keep private reflections and assessment detail outside the sponsor report.

Basis: H01 / H04 / R01 | Original executive application

HR DELIVERY / EXECUTIVE COACHING

Complete session designs

Eight practical routes from first contact to workplace application and closure.

Use the method. Keep the evidence. Protect the relationship.

COMPLETE SESSION DESIGNS

A route through the conversation.

Use these as adaptable plans. Check purpose, consent and the work context before selecting a script.

ID	Session / pathway	Planned time	Page
S01	First executive coaching session	90 min	575
S02	Assessment and 360 debrief session	75 min	577
S03	Strategic decision coaching	60 min	579
S04	Delegation and ownership session	60 min	581
S05	Difficult conversation session	60 min	583
S06	Pressure, assumptions and restart session	60 min	585
S07	Six-session executive transition pathway	360 min	587
S08	Midpoint review and closure design	90 min	589

S07 is a six-session pathway totalling 360 planned minutes, not one session. Timings are planning guides, not evidence of an optimal coaching dose. Use one significant assignment at a time and adapt or stop when the method no longer fits.

BASIS H01-H04 / Original HR Delivery session designs

S01 / RUN SHEET

First executive coaching session

Establish a useful focus, an honest relationship and a small next step without rushing into assessment.

Time	Focus	Coach action
0-10	Welcome and immediate purpose	Ask what the executive needs from today and what they understand coaching to be.
10-25	Role and context	Explore a real leadership decision, the mandate and what the sponsor expects.
25-45	Agreement and information	Confirm the four parties, role boundaries, private content, permitted updates and concerns route.
45-60	Fit and goal	Separate coachable behaviour from system or authority issues and choose a provisional goal.
60-80	Explore one episode	Use facts, interpretations and context to identify a useful question rather than a diagnosis.
80-90	Close and prepare	Summarise the coachee's choice, support needed, next evidence and what will be retained.

BETWEEN-SESSION ASSIGNMENT

Complete X01 role mandate and X14 session preparation. Ask the sponsor one agreed authority question. Do not administer an assessment until the developmental question and permissions are clear.

PREPARATION & LIMIT

Tool route: X01, X08-X14; T13-T20, T25. This is an adaptable session design, not a qualification or a mandatory interview. Pause for significant concerns and use appropriate professional routes.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S01 / ANNOTATED DIALOGUE

First executive coaching session

Establish a useful focus, an honest relationship and a small next step without rushing into assessment.

Speaker / coaching purpose	Illustrative dialogue
Coach / Starts with the coachee's purpose.	What would make this conversation useful, apart from completing the programme's paperwork?
M-07 / A legitimate tension, not evidence of resistance.	I want to stop rewriting everyone's recommendations, but the sponsor still expects me to own the decision.
Coach / Tests role authority before a personal explanation.	Which decisions are yours, and which approvals stay with the specialists?
M-07 / Reveals a system clarification.	That is not fully clear when scope changes late.
Coach / Separates coaching and management action.	We can explore your response under pressure. Who needs to clarify the scope boundary?
M-07 / Keeps the executive's agency.	The sponsor. I can ask at our next check-in.
Coach / Makes confidentiality operational.	At a review, what are you comfortable sharing about our work?
M-07 / Requires the agreement of all relevant parties.	The goal and the experiment, but not my private reflections or assessment detail.
Coach / Checks understanding rather than relying on a signature.	Let us record that and test it against a realistic sponsor request.

DEBRIEF AND NEXT DECISION

At session two, ask what the sponsor clarified, whether the agreement still fits, and which episode the coachee wants to explore. Unresolved authority is not a failure of motivation.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S02 / RUN SHEET

Assessment and 360 debrief session

Understand one authorised report, preserve its evidence limits and choose a practical behavioural experiment.

Time	Focus	Coach action
0-10	Permission and readiness	Check purpose, access, privacy rules and how the coachee wants to approach the report.
10-20	Explain the evidence	Clarify scale meaning, observation groups, missing data and relevant technical limitations.
20-40	Explore the pattern	Discuss a strength, a discrepancy and an uncertain area, using work episodes and counterexamples.
40-55	Develop a hypothesis	Separate preference, intention, behaviour and system context; avoid causal labels.
55-68	Design an experiment	Choose one practice, rehearse it and agree the opportunity, support and feedback.
68-75	Close and protect	Record what is supported, what is not established and what may be shared.

BETWEEN-SESSION ASSIGNMENT

Use X23 and X24. Tell stakeholders only the agreed practice and ask the narrow feedback questions in X64 after two relevant opportunities. Do not seek to identify raters or repeat the whole test immediately.

PREPARATION & LIMIT

Tool route: T29-T30, X22-X24, X64. Requires an authorised report, suitable technical guidance and competent interpretation. This session does not reproduce test items, invent norms or waive privacy thresholds.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S02 / ANNOTATED DIALOGUE

Assessment and 360 debrief session

Understand one authorised report, preserve its evidence limits and choose a practical behavioural experiment.

Speaker / coaching purpose	Illustrative dialogue
Coach / Returns to purpose.	Before looking at the scores, what question did we ask this report to help us explore?
M-07 / Focuses interpretation.	Whether colleagues experience enough opportunity to challenge a recommendation.
Coach / Does not average away context.	The peer and manager perspectives are different. What opportunities did each have to observe you?
M-07 / Identifies different evidence.	The manager sees formal gates; peers also see preparation meetings.
Coach / Seeks both support and contradiction.	What episode might explain the peer experience, and when was the opposite true?
M-07 / Suggests a testable sequence.	I often state a preference early. At one handover I asked for concerns first and the discussion was better.
Coach / Retains uncertainty.	That gives us a practice to test, not proof of a personality cause. What would you try?
M-07 / Owned behavioural choice.	Ask what could change the recommendation before I present it.
Coach / Protects privacy and closes the feedback loop.	What can you tell contributors without exposing individual responses?

DEBRIEF AND NEXT DECISION

Review the actual opportunity to contribute, the effect on the decision and any burden. A favourable response is not required; contrary feedback is useful evidence.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S03 / RUN SHEET

Strategic decision coaching

Improve reasoning about a consequential decision while leaving decision authority with the executive and the appropriate governance system.

Time	Focus	Coach action
0-8	Frame the decision	State the question, authority, deadline and mandatory constraints.
8-20	Examine the evidence	Separate observations, assumptions and unknowns.
20-35	Expand alternatives	Consider options through immediate, system and longer-term lenses.
35-45	Compare and challenge	Use explicit criteria and test one disputed assumption or failure route.
45-55	Choose the next move	Decide, seek evidence or route the issue to the right owner.
55-60	Record the reasoning	Capture conditions, uncertainty and a prospective review date.

BETWEEN-SESSION ASSIGNMENT

Complete X35 or X65, not both unless useful. Obtain the missing evidence and record the decision before the outcome is known.

PREPARATION & LIMIT

Tool route: X21, X27, X35-X38, X65. The coach does not authorise technical, legal, investment or safety decisions. Use qualified advice where the decision requires it.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S03 / ANNOTATED DIALOGUE

Strategic decision coaching

Improve reasoning about a consequential decision while leaving decision authority with the executive and the appropriate governance system.

Speaker / coaching purpose	Illustrative dialogue
Coach / Prevents scope drift.	What decision is yours to make today?
M-07 / Defines the executive's recommendation role.	Recommend whether we can pass the gate with one supplier confirmation outstanding.
Coach / Separates gates from weighted preferences.	What requirement is not negotiable?
M-07 / Establishes a constraint, not a coaching judgement.	Technical assurance must be complete. That part is signed off.
Coach / Generates alternatives.	What are the feasible options for the remaining uncertainty?
M-07 / Creates a comparison.	Delay, approve everything or approve a bounded step with a condition.
Coach / Invites disconfirming evidence.	What could make the bounded option unwise, and who can verify it?
M-07 / Identifies further evidence.	If downstream commitments cannot be stopped. I need the delivery lead to confirm that.
Coach / Builds prospective learning.	Record that before deciding, and keep the prediction for our review.

DEBRIEF AND NEXT DECISION

Review process and outcome separately. Ask what was reasonable at the time, what was lucky or unlucky, and which reasoning practice should change.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S04 / RUN SHEET

Delegation and ownership session

Create a safe, clearer delegation experiment by examining the task agreement and the executive's response to uncertainty.

Time	Focus	Coach action
0-10	Choose a specific task	Establish outcome, significance and why the task was taken back.
10-25	Reconstruct the agreement	Review authority, evidence, capability, capacity, checkpoints and escalation.
25-35	Examine interpretation	Ask what the executive assumed and what other explanation fits.
35-48	Rehearse a different response	Practise asking for options and reasoning before supplying the answer.
48-55	Design the trial	Agree a task, permission, support, prediction and stop conditions.
55-60	Close	Summarise ownership and the evidence to review.

BETWEEN-SESSION ASSIGNMENT

Agree and run X55 with the colleague. Keep a brief record of the checkpoint, support and reasons for any intervention. Do not use the task as a covert assessment.

PREPARATION & LIMIT

Tool route: X26, X42, X45, X55; T51-T55. Use an appropriate task and task-specific competence. Never delegate unsafe or unauthorised work as a coaching experiment.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S04 / ANNOTATED DIALOGUE

Delegation and ownership session

Create a safe, clearer delegation experiment by examining the task agreement and the executive's response to uncertainty.

Speaker / coaching purpose	Illustrative dialogue
Coach / Moves from a label to a task.	What exactly had you delegated?
M-07 / Finds an agreement gap.	The recommendation, but I did not specify when to raise a missing supplier input.
Coach / Examines meaning.	What did you infer when the draft arrived late?
M-07 / A hypothesis, not a fact.	That the specialist had not thought ahead.
Coach / Creates a behavioural option.	How could you ask about the delay without removing ownership?
M-07 / Rehearses a specific question.	Which input is missing, what options do you see and what do you recommend?
Coach / Protects legitimate authority.	When would you still need to intervene directly?
M-07 / Defines an exception.	A safety requirement or a decision beyond the specialist's authority.
Coach / Prevents an unrealistic success criterion.	Then the test is clearer delegation, not never intervening.

DEBRIEF AND NEXT DECISION

Review quality, ownership, the colleague's experience and system dependencies. If delays remain because information is late, assign the system action to its proper owner.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S05 / RUN SHEET

Difficult conversation session

Prepare a clear, respectful conversation and rehearse listening, challenge and a practical ending.

Time	Focus	Coach action
0-10	Purpose and boundaries	Clarify the issue, authority, desired outcome and whether a formal process applies.
10-20	Facts and interests	Separate observed events from inferred motives; consider the other role's legitimate interests.
20-35	First rehearsal	Practise a short opening and a plausible response, then pause for feedback.
35-45	Second rehearsal	Practise listening, summarising and maintaining a legitimate boundary.
45-55	Plan the real conversation	Choose timing, setting, support and a follow-up route.
55-60	Close	Record one key phrase and the evidence to review afterwards.

BETWEEN-SESSION ASSIGNMENT

Use X46 or X49 to prepare, then X67 after the conversation. Seek specialist advice first if the issue is legally sensitive or part of a formal employment process.

PREPARATION & LIMIT

Tool route: X27, X46-X49, X51, X67. This design is not mediation, legal advice or a disciplinary script. Do not use it to manipulate, threaten or bypass required procedures.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S05 / ANNOTATED DIALOGUE

Difficult conversation session

Prepare a clear, respectful conversation and rehearse listening, challenge and a practical ending.

Speaker / coaching purpose	Illustrative dialogue
Coach / Defines a usable outcome.	What do you need to be clear by the end?
M-07 / Keeps the work central.	How we will handle late cost evidence before the gate.
Coach / Removes accusation.	Try the opening without explaining the peer's intention.
M-07 / Uses observable facts and inquiry.	The last two updates arrived after the preparation deadline. What is getting in the way?
Coach, as peer / Introduces a plausible perspective.	Your deadline ignores when the supplier gives us information.
M-07 / Demonstrates listening before solution.	So the dependency makes the current deadline unreliable. Which earlier provisional view could we provide?
Coach / Retains accountability.	What boundary still needs to be clear?
M-07 / States a legitimate limit.	We cannot present an unverified assumption as settled.
Coach / Avoids a vague agreement.	Close with who will do what and what still needs approval.

DEBRIEF AND NEXT DECISION

Ask what happened, what the other person needed and what remains unresolved. Success is not simply getting agreement or reducing discomfort.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S06 / RUN SHEET

Pressure, assumptions and restart session

Explore a pressure-triggered work response and design a proportionate alternative without clinical interpretation.

Time	Focus	Coach action
0-10	Check the remit	Ask what is happening, whether coaching is appropriate and what support is needed.
10-25	Reconstruct one episode	Separate event, interpretation, response and work consequence.
25-35	Find resources and alternatives	Use a counterexample, fair self-talk or a perspective question with permission.
35-48	Practise a small response	Rehearse a cue and an alternative question or action.
48-55	Plan conditions	Identify workload, authority and support changes that are needed.
55-60	Close and review	Agree a modest test or a different support route.

BETWEEN-SESSION ASSIGNMENT

Choose X39, X40 or X68 according to fit, not as a battery. Practise one response and record the context. Significant distress or needs outside competence require appropriate qualified support.

PREPARATION & LIMIT

Tool route: X17, X28, X39-X42, X60, X68. No mental-health diagnosis, treatment or promise of symptom reduction. Use referral and escalation protocols when indicated.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S06 / ANNOTATED DIALOGUE

Pressure, assumptions and restart session

Explore a pressure-triggered work response and design a proportionate alternative without clinical interpretation.

Speaker / coaching purpose	Illustrative dialogue
Coach / Checks fit and choice.	Would it be useful to examine one work episode, or do you need a different kind of support today?
M-07 / Defines behaviour.	A work episode is useful. Under pressure I give the answer before people finish.
Coach / Finds the cue.	What happened immediately before that?
M-07 / Separates an assumption.	The sponsor asked for certainty and I assumed I had to provide it.
Coach / Invites a balanced alternative.	What would a responsible answer look like if uncertainty remained?
M-07 / Practical response.	State what we know, what we do not know and who can resolve it.
Coach / Avoids person-only formulation.	What in the system would make that answer acceptable?
M-07 / Names a support action.	The sponsor must accept a conditional decision where governance permits it.
Coach / Connects agency and conditions.	Let us keep both the personal practice and the sponsor clarification in the plan.

DEBRIEF AND NEXT DECISION

Review whether the alternative improved the work and whether the necessary conditions were present. Do not equate feeling calmer with a better decision.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S07 / RUN SHEET

Six-session executive transition pathway

Sequence a bounded engagement around a real role transition, adapting the plan when evidence or purpose changes.

Time	Focus	Coach action
Session 1 / 60	Align and Agree	Role mandate, fit, four-way agreement and a provisional goal.
Session 2 / 60	Assess	Episodes, context, baseline and proportionate assessment only where needed.
Session 3 / 60	Activate	Explore assumptions and rehearse one leadership decision or conversation.
Session 4 / 60	Apply	Review the first experiment and refine support, authority and practice.
Session 5 / 60	Apply and Assure	Test transfer across a second context and examine evidence and unintended effects.
Session 6 / 60	Assure and close	Review goal anchors, contribution, maintenance, sponsor summary and record lifecycle.

BETWEEN-SESSION ASSIGNMENT

Assign at most one substantial between-session activity at a time. Allow two to four weeks between sessions when work opportunities require it. This is an example pathway, not a claim about an optimal coaching dose.

PREPARATION & LIMIT

Tool route: 6A framework; X01-X03, X14, X21, X30, X45-X46, X55-X56, X64-X72. Programme design must reflect actual needs and risk. A transition may require instruction, mentoring, team work or system change in parallel.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S07 / ANNOTATED DIALOGUE

Six-session executive transition pathway

Sequence a bounded engagement around a real role transition, adapting the plan when evidence or purpose changes.

Speaker / coaching purpose	Illustrative dialogue
Session 1 prompt / Use X01 and X03; do not assume promotion means the same transition for everyone.	What must your new role contribute that your old role did not?
Session 2 prompt / Use X21 and X30; an assessment is optional, not automatic.	What evidence supports the current account, and what could contradict it?
Session 3 prompt / Use X45 or X46 and rehearse one adjustment.	What would you say or do at the difficult moment?
Session 4 prompt / Use X55 or X56; retain failed predictions.	What happened in work, and what did the conditions allow?
Session 5 prompt / Use X64 and X65; do not overgeneralise from one success.	Does the practice help in another appropriate situation?
Session 6 prompt / Use X69-X72 and close explicitly.	What can you now carry independently, and what remains owned elsewhere?
Adaptation decision / The sequence is not a rigid waterfall.	If authority remains unclear, pause the experiment and seek the proper organisational decision.
Sponsor review / The four-way information agreement governs every review.	Discuss agreed goals, practice and support, not private session content.

DEBRIEF AND NEXT DECISION

At each session, check fit, consent, evidence and opportunity. Continue, adapt, pause, rematch or stop where appropriate. Six sessions do not certify competence or guarantee a business outcome.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S08 / RUN SHEET

Midpoint review and closure design

Make a transparent decision about continuing, adapting or ending, using evidence and the agreed information boundaries.

Time	Focus	Coach action
0-15	Revisit purpose and consent	Check the original goal, changed context and what the review is authorised to discuss.
15-35	Review evidence	Examine experience, learning, application and work effects separately.
35-50	Test explanations	Identify coaching contribution, other influences, missing evidence and adverse effects.
50-65	Choose direction	Continue, adapt, stop, rematch or close, with explicit reasons and ownership.
65-80	Plan maintenance and reporting	Agree future practice, support, permitted summary and record arrangements.
80-90	Close the conversation	Invite unresolved concerns and confirm exactly what happens next.

BETWEEN-SESSION ASSIGNMENT

Complete X69 and X70 before a review where feasible. Use X71 and X72 for closure. Sponsor participation is limited to the agenda and information agreed by the coachee and other contracting parties.

PREPARATION & LIMIT

Tool route: T61-T74, X69-X72. These are original adaptable scripts. They are not an audit opinion, causal evaluation design or permission to disclose private coaching material.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

S08 / ANNOTATED DIALOGUE

Midpoint review and closure design

Make a transparent decision about continuing, adapting or ending, using evidence and the agreed information boundaries.

Speaker / coaching purpose	Illustrative dialogue
Coach / Prevents evaluation becoming a ceremonial success report.	What decision should this review help us make?
M-07 / Keeps two distinct questions.	Whether the work has been useful enough to continue, and what I can now do independently.
Coach / Tests the evidence chain.	Which evidence concerns changed behaviour, not just a useful conversation?
M-07 / Includes limits.	Two gate records and feedback show a clearer sequence. The supplier delay has not improved.
Coach / Avoids inflated attribution.	What else helped the new sequence happen?
M-07 / Names co-contributors.	Earlier evidence and the sponsor's authority clarification.
Coach / Links evidence to action.	Then what is a fair claim and a sensible next decision?
M-07 / Supports independence.	The coaching helped me practise, but the system changes mattered too. I can maintain the routine and close this goal.
Coach / Completes the information lifecycle.	What may be shared, and what remains private after we end?

DEBRIEF AND NEXT DECISION

An extension needs a defined question and purpose. Do not continue because the ending feels uncomfortable or because unused sessions remain. Resolve complaints and referrals through their proper routes.

BASIS H01-H04 / Original adaptable scripts | M-07 dialogue is fictional

SOURCE CONTINUITY

The ebook and this toolkit

Page references below refer to the supplied 131-page D6 ebook, not this manual.

Ebook area	Pages	Source contribution	Toolkit application
Framework	6-8	6A, three levels, six enablers and quality lens	Model opening; all six A sections
Defining and selecting help	9-18	Coaching, mentoring, management and specialist boundaries	T03, X08; help and pause routes
Contracting	19-23	Trustworthy agreement and sponsor boundaries	T13-T24, X09-X14
Listening and reflection	25-28	Inquiry, meaning and checked interpretation	T37-T43, X14, X27
Goals and action	29-33	Observable goals, evidence and small practice	T31-T33, X55-X61
Feedback and challenge	34-38	Behaviour, perspective and agency	X22-X24, X46-X50
Mentoring	40-45	Experience and advice without imposing a career	Kept distinct; not renamed as coaching
Ethics and difficult situations	46-50	Competence, conflicts, referral and repair	T20-T24, T69-T72, X11, X52
Programme design	51-57	Access, matching, governance and capacity	T01-T12, T75-T84
Practitioner development	58-62	Observed practice and support	T68, T77, T79-T80
Evaluation and closure	63-71	Contribution, independence and endings	T61-T74, X69-X72

The mappings are editorial navigation aids. The ebook is not the complete 88-tool suite, and its C-resource IDs do not replace T01-T88. Where an internal ebook reference differs from an actual resource heading, use the heading and page range shown here. New activities remain X01-X72.

SOURCE CONTINUITY

The ebook and this toolkit

Page references below refer to the supplied 131-page D6 ebook, not this manual.

Ebook area	Pages	Source contribution	Toolkit application
Madar Facilities case	72-79	A fictional coaching pilot reveals operational barriers	Separate case lesson; not merged with Meridian
Harbour mentoring case	80-84	Knowledge transfer and career agency	Mentoring distinction retained
Assessment companion	85-88	Preference, judgement, behaviour and technical limits	46-offering selector; X23-X24
Practitioner learning pathway	89-91	A learning route, not a qualification	Session designs and supervised practice guidance
Worked and reusable resources	92-122	Separate ebook resource IDs and records	Linked conceptually, not renumbered as T tools
C03 resource heading	99-101	Goal, baseline and workplace experiment	T31-T33, T51, X55; use actual heading/pages
Framework connections	125-126	Coaching sits within wider HR and OD work	System actions retained alongside coaching
Sources and responsible use	127-131	Evidence, permissions and publication limits	Source register and edition notes

The mappings are editorial navigation aids. The ebook is not the complete 88-tool suite, and its C-resource IDs do not replace T01-T88. Where an internal ebook reference differs from an actual resource heading, use the heading and page range shown here. New activities remain X01-X72.

Sources and practice notes

What the framework preserves, what the research informs and what remains an educational adaptation.

Use the method. Keep the evidence. Protect the relationship.

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

H01

HR Delivery (2026). Coaching and Mentoring at Work. D6 editorial edition.

Source publication

Supplied 131-page ebook. Governs distinctions, relationship practice, cases and assessment cautions.

Supplied: D6_Coaching_and_Mentoring.pdf

H02

HR Delivery (2026). 6A Workplace Coaching System: One-page Framework, second edition.

Source framework

Controlling six stages, three levels, six enablers and four-part quality lens.

HR_Delivery_Workplace_Coaching_One_Page_Framework.pdf

H03

HR Delivery (2026). Workplace Coaching White Paper, second edition.

Source publication

Organisational rationale, evidence and operating architecture. Maturity labels differ from H04 Appendix M; see edition crosswalk.

HR_Delivery_Workplace_Coaching_White_Paper.pdf

H04

HR Delivery (2026). Workplace Coaching Extensive Toolkit, second edition.

Source toolkit

88 original tool IDs and titles retained. Operational templates re-presented; selected conflicts are disclosed and resolved against the controlling framework.

HR_Delivery_Workplace_Coaching_Extensive_Toolkit.pdf

BASIS Public references reviewed October 2026 | No endorsement, accreditation or universal efficacy claim

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

H05

HR Delivery. Assessment catalogue.

Catalogue / checked 12 October 2026

Live catalogue reviewed for names and intended applications. A catalogue is not technical validation or a licence to reconstruct a test.

https://hr.delivery/hr-delivery/assessments

R01

International Coaching Federation. Code of Ethics (effective 1 April 2025).

Professional standard

Ethical relationship, responsibilities, agreements, confidentiality, conflicts and accountable practice.

https://coachingfederation.org/credentialing/coaching-ethics/icf-code-of-ethics/

R02

International Coaching Federation. 2025 Core Competencies.

Professional standard

Competence reference, not a qualification granted by this toolkit.

https://coachingfederation.org/wp-content/uploads/2025/09/icf-cs-core-competencies-2025.pdf

R03

Global Code of Ethics. Fourth version, December 2025.

Professional standard

Public code and version reference. Apply the professional code governing your actual practice.

https://globalcodeofethics.org/

BASIS Public references reviewed October 2026 | No endorsement, accreditation or universal efficacy claim

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R04 **International Test Commission. International Guidelines for Test Use.**

Testing guidance

Competent, appropriate and ethical test use, with evidence relevant to intended purpose.

https://www.intestcom.org/page/15

R05 **International Test Commission. Guidelines for Translating and Adapting Tests, second edition.**

Testing guidance

Translation alone does not establish equivalent measurement or valid interpretation.

https://www.intestcom.org/files/guideline_test_adaptation_2ed.pdf

R06 **Nicolau, Candel, Constantin and Kleingeld (2023). The effects of executive coaching on behaviors, attitudes, and personal characteristics: a meta-analysis of randomized control trial studies.**

Research synthesis

Average effects across interventions do not validate each exercise or guarantee individual outcomes.

https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1089797/full

R07 **Workplace coaching: a meta-analysis and recommendations for advancing the science of coaching (2023). Frontiers in Psychology, article 1204166.**

Research synthesis

Evidence for workplace coaching should be interpreted with design, measures and heterogeneity in view.

https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1204166/full

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R08 **Grant, Curtayne and Burton (2009). Executive coaching enhances goal attainment, resilience and workplace well-being: a randomised controlled study.**

Primary coaching study

A specific multicomponent executive intervention; its results cannot be assigned to a standalone worksheet.

https://doi.org/10.1080/17439760902992456

R09 **The Open University. Workplace learning: coaching and mentoring, section 5.2.**

Educational method

GROW as a conversation scaffold, not a substitute for contracting or responsive listening.

https://www.open.edu/openlearn/money-business/workplace-learning-coaching-and-mentoring/content-section-5.2

R10 **McKergow and Jackson. The OSKAR coaching framework.**

Creator method

Outcome, Scaling, Know-how and resources, Affirm and Action, Review. This toolkit uses original executive prompts.

https://sfwork.com/oskar-coaching

R11 **Motivational Interviewing Network of Trainers. Understanding motivational interviewing.**

Professional method

Collaborative exploration of ambivalence and autonomy; no claim of MI certification or treatment competence.

https://motivationalinterviewing.org/node/11216

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R12

Center for Creative Leadership. Situation-Behavior-Impact feedback model.

Creator/practitioner method

Describe the situation, observed behaviour and impact, then inquire rather than assume intent.

https://www.ccl.org/articles/leading-effectively-article/sbi-feedback-model-a-quick-win-to-improve-talent-conversations-development/

R13

Marshall Goldsmith. Try Feedforward Instead of Feedback.

Creator/practitioner method

Future-oriented suggestions are used with permission; this toolkit supplies an independent workplace application.

https://www.marshallgoldsmith.com/post/try-feedforward-instead-of-feedback

R14

Kegan and Lahey (2001). The Real Reason People Won't Change.

Creator publication

Competing commitments and assumptions as a reflective hypothesis, not a diagnosis or reason to force disclosure.

https://store.hbr.org/product/the-real-reason-people-won-t-change/R0110E

R15

Harvard Program on Negotiation. Difficult conversations resource.

Professional education

Separate observed impact from assumed intention; explore interests and contribution without excusing misconduct.

https://www.pon.harvard.edu/wp-content/uploads/images/posts/dbcr29.pdf

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R16

Neff. Exploring self-compassion through writing.

Creator practice

Inspires a brief, optional, work-focused reflective activity. The original exercise is not reproduced.

https://self-compassion.org/exercises/exercise-3-exploring-self-compassion-through-writing/

R17

Locke and Latham (2002). Building a practically useful theory of goal setting and task motivation.

Research synthesis

Specific goals, feedback and task complexity require judgement; performance targets are not always the best learning goals.

https://doi.org/10.1037/0003-066X.57.9.705

R18

Gollwitzer and Sheeran (2006). Implementation intentions and goal achievement.

Research synthesis

If-then plans connect a recognisable cue with a chosen action. Executive adaptation here is not separately validated.

https://doi.org/10.1016/S0065-2601(06)38002-1

R19

WOOP: Wish, Outcome, Obstacle, Plan.

Creator method

Creator guidance for mental contrasting with implementation intentions; use a feasible, ethical work wish.

https://woopmylife.org/

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R20 **Mental contrasting with implementation intentions: meta-analysis (2021).**

Research synthesis

General goal-attainment evidence does not establish a fixed benefit for executives or any specific organisational outcome.

https://pmc.ncbi.nlm.nih.gov/articles/PMC8149892/

R21 **Ryan and Deci (2000). Self-determination theory and the facilitation of intrinsic motivation, social development and well-being.**

Foundational research

Autonomy, competence and relatedness inform questions about conditions, not a new diagnostic score.

https://selfdeterminationtheory.org/SDT/documents/2000_RyanDeci_SDT.pdf

R22 **University of Michigan, Center for Positive Organizations. Reflected Best Self Exercise.**

Licensed resource pointer

A separately licensed product. Our best-work episode review is an original activity, not a reproduction of the licensed exercise.

https://positiveorgs.bus.umich.edu/cpo-tool/reflected-best-self-exercise/

R23 **University of Michigan, Center for Positive Organizations. Job Crafting Exercise.**

Licensed resource pointer

A separately licensed resource. Our role-crafting proposal is an independent work-design discussion, not its booklet or scoring.

https://positiveorgs.bus.umich.edu/cpo-tool/job-crafting-exercise/

SOURCES AND FURTHER PRACTICE

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R24 **Kross et al. (2014). Self-talk as a regulatory mechanism: how you do it matters.**

Primary experimental research

Experimental self-distancing evidence; our short executive reflection is an adaptation, not clinical treatment.

https://pubmed.ncbi.nlm.nih.gov/24467424/

R25 **Lally et al. (2010). How are habits formed: modelling habit formation in the real world.**

Primary research

Habit formation varies. Do not promise that a behaviour will become automatic in 21 or 66 days.

https://doi.org/10.1002/ejsp.674

R26 **Turner-Stokes (2009). Goal attainment scaling in rehabilitation: a practical guide.**

Method with transfer limitations

The toolkit borrows explicit individual anchors. It does not import clinical norms, T-scores or validation into executive coaching.

https://www.kcl.ac.uk/nmpc/assets/rehab/6.-goal-attainment-scaling-a-practical-guide.pdf

WORKING GLOSSARY

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Agency	The coachee's meaningful ownership of choices within real constraints.
Alliance	Agreement on purpose and work, with a relationship that supports useful learning; not a score invented by this toolkit.
Assessment	A defined method of gathering evidence, whose intended use and technical basis matter.
Baseline	The starting evidence, with a defined behaviour, period, context and source.
Boundary	A limit of purpose, role, authority, competence, information or method.
Capability	What a person can demonstrate under relevant conditions, not merely a preference or confidence rating.
Capacity	The actual time, resources and support available to do the work.
Coachee	The person receiving coaching; their agency and information rights remain central.

BASIS H01-H04 / Original editorial definitions

WORKING GLOSSARY

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Coaching	A purposeful developmental partnership supporting reflection, choice, practice and learning.
Confidentiality	Agreed protection of information with explicit applicable limits, not absolute secrecy.
Contribution	A reasoned account of how coaching may have helped alongside other influences.
Counterexample	Evidence that qualifies or challenges a proposed pattern or interpretation.
Experiment	A small, ethical attempt to test a practice and learn from the result.
Four-way contract	Agreement covering coachee, coach, sponsor and programme owner, with other support roles explicit.
Goal anchor	A predefined description of a level of attainment for one specific goal.
Hypothesis	A provisional explanation or prediction open to testing and revision.

BASIS H01-H04 / Original editorial definitions

WORKING GLOSSARY

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Impact	A consequence experienced in work; not established by attendance or satisfaction alone.
Interpretation	Meaning assigned to evidence, distinguishable from the evidence itself.
Mentoring	Development through relevant experience, advice, challenge and connections while respecting the mentee's direction.
Programme owner	The role accountable for the coaching service's design, operations and governance.
Re-contracting	Reviewing and revising an agreement when purpose, roles, risks or conditions change.
Referral	Connecting a need to an appropriate qualified route beyond the coach's remit.
Sponsor	The commissioning or supporting role; funding does not confer ownership of private session content.
Supervision	Reflective and ethical professional support for the coach's practice and judgement.

BASIS H01-H04 / Original editorial definitions

WORKING GLOSSARY

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Transfer	Use and adaptation of learning in actual work.
Validation	Evidence supporting a specified interpretation and use, not a property established by a polished report.

BASIS H01-H04 / Original editorial definitions

EDITION AND RESPONSIBLE USE

Executive Coaching Framework & Toolkit

Visual Practice Edition / October 2026 / HR Delivery

Scope and source continuity

The original 606-page manual is the content and pagination master. All 160 tool identifiers are retained: T01-T88 and X01-X72. The 6A names, operating levels, enablers, quality lens, assessment companion and D6 ebook crosswalk remain intact.

Presentation revision

All 72 executive activities have redesigned working forms and matching worked examples. Fifteen core coaching tools also have redesigned forms and examples. Registers, contracts and other tools retain tabular formats when that is the useful working format.

Examples and measures

Source case examples remain fictional. Plotted positions that are not numerical source data are labelled illustrative. Wheels and personal scales are reflection aids, not validated tests, norms or predictions. No missing data are invented to make a chart look complete.

Use and professional responsibility

This is an educational and practical aid, not accreditation, clinical treatment, legal advice or technical authorisation. Use appropriate competence, consent, qualified advice and organisational processes for consequential decisions.

Source and intellectual property

Third-party model names and materials remain with their owners. Protected assessment item banks and separately licensed commercial exercise booklets are not reproduced. New visual working layouts do not alter the evidence status of a method.

Publication and privacy

The foreword remains prepared for Dr Phillip Welsh's review and approval. Keep one engagement per working copy and share only agreed outputs. Different workbook tabs are not a confidentiality boundary, and the complete workbook is not a sponsor report.

Working files and navigation

The manual has 606 pages; the coachee pack has 88. Original page references remain valid. The Excel workbook contains 183 tabs: the original 175 plus one visual index and seven additional working views. It includes seven new native charts alongside the original eight.

Access and quality boundaries

PDF text fields can be completed in a compatible reader; use its drawing tool for freehand plotting. Live numerical charts are in Excel. Cover imagery is conceptual brand artwork. Technical and visual checks are not PDF/UA certification or independent professional approval.

Basis: HR Delivery | Original source attribution retained