Executive coaching Workbook reference

The companion worksheets, prompts and working records for HR Delivery's 6A Workplace Coaching System.

183 worksheets. 160 toolkit entries. Six connected coaching responsibilities.

How to use this reading edition

Find the worksheet that matches your coaching purpose, then read its labels, prompts and guidance alongside the complete Executive Coaching Toolkit. All source worksheets are included, in their original order. PDF bookmarks help you move between them.

This edition is for reading on screen. Spreadsheet inputs, calculations, charts and navigation controls are not interactive here. Blank records are not participant results. The separate EX examples retain their fictional teaching context.

For visual activity layouts and worked examples, use the Executive Coaching Toolkit and Coachee Visual Workbook in the coaching library.

001 / 00 Start

Start with a useful conversation

One engagement per working copy. Blank live records; separate fictional EX examples.

01 SET UP

Open 01 Setup. Agree the purpose, parties, date basis and information boundaries before recording personal information.

02 CHOOSE A TOOL

Open 02 Tool Index, or 03 Activity Finder for the 72 executive activities. The manual explains the method, working form and example.

03 WORK AND LEARN

Complete only the records relevant to the engagement. Use one small, authorised workplace experiment and review what happened.

04 SHARE SELECTIVELY

Create a separate approved sponsor summary. Do not share the entire workbook; hidden sheets and sheet protection are not confidentiality controls.

05 REVIEW AND CLOSE

Use Assure tools throughout. Review value, alternatives, support, sustainability and safe closure rather than prolonging coaching by default.

TEAL INPUTS = editable records. GREY OUTPUTS = formulas. EX sheets contain fictional teaching data and do not populate the live dashboard.

This is a macro-free local workbook, not a secure case-management platform. Store and transmit it through approved arrangements; maintain a clean master.

NEW: 12 Visual Index — seven live visual worksheets

Visual Practice Edition: seven additional plotting and comparison sheets complement the original working records. Use the redesigned PDF for the complete visual activity pages.

002 / 01 Setup

Set up the engagement

Use pseudonyms and minimum necessary data. Dates and decisions are entered by the responsible practitioner.

Engagement reference	
Coachee pseudonym	
Coach	
Sponsor	
Programme owner	
Current 6A focus	
As-of / reporting date	
Start date	
Planned review / closure date	
Agreed development purpose	
Information-sharing boundary	
Record access / retention decision	
Minutes per hour (constant)	60

An employer may fund coaching without being entitled to private session content. The coachee, coach, sponsor and programme owner agree what will be shared and when.

003 / 02 Tool Index

The complete 160-tool index

88 retained source tools + 72 new executive activities. Page references match the companion manual.

ID	Tool / activity	6A	Guide page	Form page	Example page	Open worksheet	Type
T01	Strategic coaching charter	Align	32	33	34	T01 Strategic coaching charter	Retained tool
T02	Strategy-to-behaviour chain	Align	35	36	37	T02 Strategytobehaviour chain	Retained tool
T03	Intervention fit test	Align	38	39	40	T03 Intervention fit test	Retained tool
T04	Coaching portfolio map	Align	41	42	43	T04 Coaching portfolio map	Retained tool
T05	Stakeholder and power map	Align	44	45	46	T05 Stakeholder and power map	Retained tool
T06	Business case canvas	Align	47	48	49	T06 Business case canvas	Retained tool
T07	Eligibility and equity matrix	Align	50	51	52	T07 Eligibility and equity matr	Retained tool
T08	Coaching mode decision matrix	Align	53	54	55	T08 Coaching mode decision matr	Retained tool
T09	Programme theory of change	Align	56	57	58	T09 Programme theory of change	Retained tool

T10	Coaching risk register	Align	59	60	61	T10 Coaching risk register	Retained tool
T11	Governance RACI	Align	62	63	64	T11 Governance RACI	Retained tool
T12	Programme readiness gate	Align	65	66	67	T12 Programme readiness gate	Retained tool
T75	Service blueprint and participant journey	Align	68	69	70	T75 Service blueprint and parti	Retained tool
T76	Coach capability framework	Align	71	72	73	T76 Coach capability framework	Retained tool
T81	Provider RFP and due-diligence scorecard	Align	74	75	76	T81 Provider RFP and duediligen	Retained tool
T82	Implementation workplan and milestone tracker	Align	77	78	79	T82 Implementation workplan and	Retained tool
T83	Communications and stakeholder plan	Align	80	81	82	T83 Communications and stakehol	Retained tool
T84	Capacity, budget and demand model	Align	83	84	85	T84 Capacity budget and demand	Retained tool
X01	Executive role mandate	Align	86	87	88	X01 Executive role mandate	New activity
X02	Leadership impact compass	Align	89	90	91	X02 Leadership impact compass	New activity
X03	Role-transition bridge	Align	92	93	94	X03 Roletransition bridge	New activity

X04	Priority and opportunity-cost review	Align	95	96	97	X04 Priority and opportunitycos	New activity
X05	Purpose, values and leadership choices	Align	98	99	100	X05 Purpose values and leadersh	New activity
X06	Stakeholder value interview	Align	101	102	103	X06 Stakeholder value interview	New activity
X07	Twelve-month future story	Align	104	105	106	X07 Twelvemonth future story	New activity
X08	Is coaching the right help?	Align	107	108	109	X08 Is coaching the right help	New activity
T13	Four-way contracting canvas	Agree	115	116	117	T13 Fourway contracting canvas	Retained tool
T14	Coachee agreement	Agree	120	121	122	T14 Coachee agreement	Retained tool
T15	Sponsor briefing guide	Agree	123	124	125	T15 Sponsor briefing guide	Retained tool
T16	Confidentiality information protocol	Agree	126	127	128	T16 Confidentiality information	Retained tool
T17	Role-conflict declaration	Agree	129	130	131	T17 Roleconflict declaration	Retained tool
T18	Session working agreement	Agree	132	133	134	T18 Session working agreement	Retained tool
T19	Data processing map	Agree	135	136	137	T19 Data processing map	Retained tool

T20	Referral and escalation protocol	Agree	138	139	140	T20 Referral and escalation pro	Retained tool
T21	Rematch and termination guide	Agree	141	142	143	T21 Rematch and termination gui	Retained tool
T22	Team coaching contract	Agree	144	145	146	T22 Team coaching contract	Retained tool
T23	Digital and AI consent notice	Agree	147	148	149	T23 Digital and AI consent noti	Retained tool
T24	Contract quality audit	Agree	150	151	152	T24 Contract quality audit	Retained tool
T78	Matching, chemistry and rematch protocol	Agree	153	154	155	T78 Matching chemistry and rema	Retained tool
X09	Chemistry conversation from the coachee's chair	Agree	156	157	158	X09 Chemistry conversation from	New activity
X10	Negotiate a shared coaching goal	Agree	159	160	161	X10 Negotiate a shared coaching	New activity
X11	Confidentiality boundaries rehearsal	Agree	162	163	164	X11 Confidentiality boundaries	New activity
X12	Feedback and challenge agreement	Agree	165	166	167	X12 Feedback and challenge agre	New activity
X13	Participation, agency and expectations	Agree	168	169	170	X13 Participation agency and ex	New activity
X14	Session preparation and private learning record	Agree	171	172	173	X14 Session preparation and pri	New activity

T25	Readiness and expectations check	Assess	206	207	208	T25 Readiness and expectations	Retained tool
T26	Person-role-system scan	Assess	209	210	211	T26 Personrolesystem scan	Retained tool
T27	Strengths evidence map	Assess	212	213	214	T27 Strengths evidence map	Retained tool
T28	Critical moments analysis	Assess	215	216	217	T28 Critical moments analysis	Retained tool
T29	Stakeholder perspective plan	Assess	218	219	220	T29 Stakeholder perspective pla	Retained tool
T30	Psychometric use check	Assess	221	222	223	T30 Psychometric use check	Retained tool
T31	Goal architecture canvas	Assess	224	225	226	T31 Goal architecture canvas	Retained tool
T32	Baseline evidence record	Assess	227	228	229	T32 Baseline evidence record	Retained tool
T33	Goal attainment scale	Assess	230	231	232	T33 Goal attainment scale	Retained tool
T34	Barrier and leverage map	Assess	233	234	235	T34 Barrier and leverage map	Retained tool
T35	Learning preference and access profile	Assess	236	237	238	T35 Learning preference and acc	Retained tool
T36	Coaching formulation	Assess	239	240	241	T36 Coaching formulation	Retained tool

X15	Leadership lifeline	Assess	242	243	244	X15 Leadership lifeline	New activity
X16	Best-work episode review	Assess	245	246	247	X16 Bestwork episode review	New activity
X17	Strengths dosage: underuse and overuse	Assess	248	249	250	X17 Strengths dosage underuse a	New activity
X18	Values trade-off cards	Assess	251	252	253	X18 Values tradeoff cards	New activity
X19	Energy and attention diary	Assess	254	255	256	X19 Energy and attention diary	New activity
X20	Calendar versus contribution audit	Assess	257	258	259	X20 Calendar versus contributio	New activity
X21	Critical decision reconstruction	Assess	260	261	262	X21 Critical decision reconstru	New activity
X22	Stakeholder perception interviews	Assess	263	264	265	X22 Stakeholder perception inte	New activity
X23	Leadership 360 debrief	Assess	266	267	268	X23 Leadership 360 debrief	New activity
X24	Assessment-to-experiment bridge	Assess	269	270	271	X24 Assessmenttoexperiment brid	New activity
X25	Relationship system map	Assess	272	273	274	X25 Relationship system map	New activity
X26	Delegation bottleneck review	Assess	275	276	277	X26 Delegation bottleneck revie	New activity

X27	Assumptions and contrary evidence	Assess	278	279	280	X27 Assumptions and contrary ev	New activity
X28	Control, influence and system action	Assess	281	282	283	X28 Control influence and syste	New activity
X29	Leadership context wheel	Assess	284	285	286	X29 Leadership context wheel	New activity
X30	Integrated coaching formulation	Assess	287	288	289	X30 Integrated coaching formula	New activity
T37	Session planning canvas	Activate	296	297	298	T37 Session planning canvas	Retained tool
T38	GROW conversation guide	Activate	299	300	301	T38 GROW conversation guide	Retained tool
T39	CLEAR conversation guide	Activate	302	303	304	T39 CLEAR conversation guide	Retained tool
T40	OSKAR solution-focused guide	Activate	305	306	307	T40 OSKAR solutionfocused guide	Retained tool
T41	Powerful question planner	Activate	308	309	310	T41 Powerful question planner	Retained tool
T42	Listening observation sheet	Activate	311	312	313	T42 Listening observation sheet	Retained tool
T43	Challenge with permission	Activate	314	315	316	T43 Challenge with permission	Retained tool
T44	Values-to-choice map	Activate	317	318	319	T44 Valuestochoice map	Retained tool

T45	Assumption testing canvas	Activate	320	321	322	T45 Assumption testing canvas	Retained tool
T46	Immunity-to-change map	Activate	323	324	325	T46 Immunitytochange map	Retained tool
T47	Decision quality canvas	Activate	326	327	328	T47 Decision quality canvas	Retained tool
T48	Difficult conversation rehearsal	Activate	329	330	331	T48 Difficult conversation rehe	Retained tool
T49	Feedback and feedforward planner	Activate	332	333	334	T49 Feedback and feedforward pl	Retained tool
T50	Session close and commitment	Activate	335	336	337	T50 Session close and commitmen	Retained tool
X31	Describe the preferred future	Activate	338	339	340	X31 Describe the preferred futu	New activity
X32	Find the useful exception	Activate	341	342	343	X32 Find the useful exception	New activity
X33	Scaling and one step better	Activate	344	345	346	X33 Scaling and one step better	New activity
X34	Perspective positions	Activate	347	348	349	X34 Perspective positions	New activity
X35	Weighted decision comparison	Activate	350	351	352	X35 Weighted decision compariso	New activity
X36	Premortem for a leadership experiment	Activate	353	354	355	X36 Premortem for a leadership	New activity

X37	Strategic zoom	Activate	356	357	358	X37 Strategic zoom	New activity
X38	Both-and tension map	Activate	359	360	361	X38 Bothand tension map	New activity
X39	Event, interpretation and choice	Activate	362	363	364	X39 Event interpretation and ch	New activity
X40	Distanced self-talk for a work decision	Activate	365	366	367	X40 Distanced selftalk for a wo	New activity
X41	Compassionate challenge after a setback	Activate	368	369	370	X41 Compassionate challenge aft	New activity
X42	Ambivalence conversation	Activate	371	372	373	X42 Ambivalence conversation	New activity
X43	Ladder of inference check	Activate	374	375	376	X43 Ladder of inference check	New activity
X44	Competing commitments inquiry	Activate	377	378	379	X44 Competing commitments inqui	New activity
X45	Courage through graded rehearsal	Activate	380	381	382	X45 Courage through graded rehe	New activity
X46	Difficult conversation rehearsal	Activate	383	384	385	X46 Difficult conversation rehe	New activity
X47	Negotiation interests and boundaries	Activate	386	387	388	X47 Negotiation interests and b	New activity
X48	Conflict response choice	Activate	389	390	391	X48 Conflict response choice	New activity

X49	SBI feedback rehearsal	Activate	392	393	394	X49 SBI feedback rehearsal	New activity
X50	Ask for feedforward	Activate	395	396	397	X50 Ask for feedforward	New activity
X51	Boundary-setting and saying no	Activate	398	399	400	X51 Boundarysetting and saying	New activity
X52	Ethical dilemma rehearsal	Activate	401	402	403	X52 Ethical dilemma rehearsal	New activity
X53	Metaphor as a thinking aid	Activate	404	405	406	X53 Metaphor as a thinking aid	New activity
X54	Future leadership identity in practice	Activate	407	408	409	X54 Future leadership identity	New activity
T51	Workplace experiment canvas	Apply	415	416	417	T51 Workplace experiment canvas	Retained tool
T52	Implementation intention	Apply	418	419	420	T52 Implementation intention	Retained tool
T53	Stakeholder support agreement	Apply	421	422	423	T53 Stakeholder support agreeme	Retained tool
T54	Manager transfer conversation	Apply	424	425	426	T54 Manager transfer conversati	Retained tool
T55	After-action review	Apply	427	428	429	T55 Afteraction review	Retained tool
T56	Habit and environment design	Apply	430	431	432	T56 Habit and environment desig	Retained tool

T57	Relapse and pressure plan	Apply	433	434	435	T57 Relapse and pressure plan	Retained tool
T58	90-day transfer plan	Apply	436	437	438	T58 90day transfer plan	Retained tool
T59	Learning journal	Apply	439	440	441	T59 Learning journal	Retained tool
T60	Closure and sustainment plan	Apply	442	443	444	T60 Closure and sustainment pla	Retained tool
X55	Fourteen-day delegation experiment	Apply	445	446	447	X55 Fourteenday delegation expe	New activity
X56	A new decision-meeting routine	Apply	448	449	450	X56 A new decisionmeeting routi	New activity
X57	Strategic calendar sprint	Apply	451	452	453	X57 Strategic calendar sprint	New activity
X58	Stakeholder listening tour	Apply	454	455	456	X58 Stakeholder listening tour	New activity
X59	Reciprocal network development	Apply	457	458	459	X59 Reciprocal network developm	New activity
X60	Habit cues and friction	Apply	460	461	462	X60 Habit cues and friction	New activity
X61	WOOP work experiment	Apply	463	464	465	X61 WOOP work experiment	New activity
X62	Role-crafting proposal	Apply	466	467	468	X62 Rolecrafting proposal	New activity

X63	Confidence through work evidence	Apply	469	470	471	X63 Confidence through work evi	New activity
X64	Targeted behavioural feedback pulse	Apply	472	473	474	X64 Targeted behavioural feedba	New activity
X65	Prospective decision journal	Apply	475	476	477	X65 Prospective decision journa	New activity
X66	Learning-partner check-in	Apply	478	479	480	X66 Learningpartner checkin	New activity
X67	After-action review of a difficult conversation	Apply	481	482	483	X67 Afteraction review of a dif	New activity
X68	Setback and restart plan	Apply	484	485	486	X68 Setback and restart plan	New activity
T61	Coaching dashboard specification	Assure	492	493	494	T61 Coaching dashboard specific	Retained tool
T62	Experience and alliance pulse	Assure	495	496	497	T62 Experience and alliance pul	Retained tool
T63	Goal progress review	Assure	500	501	502	T63 Goal progress review	Retained tool
T64	Behavioural evidence interview	Assure	503	504	505	T64 Behavioural evidence interv	Retained tool
T65	Contribution analysis	Assure	506	507	508	T65 Contribution analysis	Retained tool
T66	Cost-consequence analysis	Assure	509	510	511	T66 Costconsequence analysis	Retained tool

T67	Responsible ROI estimator	Assure	512	513	514	T67 Responsible ROI estimator	Retained tool
T68	Coach quality scorecard	Assure	515	516	517	T68 Coach quality scorecard	Retained tool
T69	Supervision record	Assure	518	519	520	T69 Supervision record	Retained tool
T70	Ethical decision record	Assure	521	522	523	T70 Ethical decision record	Retained tool
T71	Incident and complaint pathway	Assure	524	525	526	T71 Incident and complaint path	Retained tool
T72	AI coaching assurance checklist	Assure	527	528	529	T72 AI coaching assurance check	Retained tool
T73	Quarterly portfolio review	Assure	530	531	532	T73 Quarterly portfolio review	Retained tool
T74	Maturity assessment	Assure	533	534	535	T74 Maturity assessment	Retained tool
T77	Coach selection and observed-practice rubric	Assure	540	541	542	T77 Coach selection and observe	Retained tool
T79	Supervision standard and cadence	Assure	543	544	545	T79 Supervision standard and ca	Retained tool
T80	Coach authorisation, CPD and caseload record	Assure	546	547	548	T80 Coach authorisation CPD and	Retained tool
T85	Evaluation design and data-collection matrix	Assure	549	550	551	T85 Evaluation design and datac	Retained tool

T86	Aggregate themes and organisational action log	Assure	552	553	554	T86 Aggregate themes and organi	Retained tool
T87	Quality-assurance sampling plan	Assure	555	556	557	T87 Qualityassurance sampling p	Retained tool
T88	Supplier/platform continuity and exit plan	Assure	558	559	560	T88 Supplierplatform continuity	Retained tool
X69	Anchored goal-attainment review	Assure	561	562	563	X69 Anchored goalattainment rev	New activity
X70	Learning and contribution story	Assure	564	565	566	X70 Learning and contribution s	New activity
X71	Six-month maintenance and self-coaching plan	Assure	567	568	569	X71 Sixmonth maintenance and se	New activity
X72	Closure conversation and future letter	Assure	570	571	572	X72 Closure conversation and fu	New activity

004 / 03 Activity Finder

Find a coachee activity

Choose by the current work question, not by completing every worksheet.

ID	Activity	6A	Purpose	Time	Work mode	Open worksheet	Manual page
X01	Executive role mandate	Align	Turn a broad executive job title into a specific account of contribution, authority and the leadership work that coaching can support.	45 minutes together; 20 minutes preparation	Coach and coachee; involve others only with their agreement	X01 Executive role mandate	86
X02	Leadership impact compass	Align	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.	40 minutes	Coach and coachee; involve others only with their agreement	X02 Leadership impact compass	89
X03	Role-transition bridge	Align	Distinguish the leadership habits to carry forward, retire and develop when an executive enters a broader role.	50 minutes; 15 minutes independent reflection	Coach and coachee; involve others only with their agreement	X03 Roletransition bridge	92

X04	Priority and opportunity-cost review	Align	Choose what coaching will address by making competing priorities, effort and the cost of adding another commitment visible.	35 minutes	Coach and coachee; involve others only with their agreement	X04 Priority and opportunitycos	95
X05	Purpose, values and leadership choices	Align	Connect personally meaningful values to difficult executive choices without prescribing a preferred value system.	50 minutes	Coach and coachee; involve others only with their agreement	X05 Purpose values and leadersh	98
X06	Stakeholder value interview	Align	Gather direct, consented information about the contribution others need from the executive before setting the coaching agenda.	45 minutes preparation; three 15-minute interviews	Coach and coachee; involve others only with their agreement	X06 Stakeholder value interview	101
X07	Twelve-month future story	Align	Explore a plausible desired future and work backwards to the leadership practices and conditions it would require.	45 minutes	Coach and coachee; involve others only with their agreement	X07 Twelvemonth future story	104

X08	Is coaching the right help?	Align	Make a joint, non-stigmatising choice between coaching and other forms of support before an engagement becomes a default remedy.	40 minutes	Coach and coachee; involve others only with their agreement	X08 Is coaching the right help	107
X09	Chemistry conversation from the coachee's chair	Agree	Give the executive an active role in choosing a coach and testing whether the relationship can be useful, safe and appropriately challenging.	30 minutes; 10 minutes private reflection	Coach and coachee; involve others only with their agreement	X09 Chemistry conversation from	156
X10	Negotiate a shared coaching goal	Agree	Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.	60 minutes; coach prepares separately with each party	Coach and coachee; involve others only with their agreement	X10 Negotiate a shared coaching	159
X11	Confidentiality boundaries rehearsal	Agree	Make the information agreement usable by practising realistic requests before a boundary is put under pressure.	35 minutes	Coach and coachee; involve others only with their agreement	X11 Confidentiality boundaries	162

X12	Feedback and challenge agreement	Agree	Agree how the coach can offer observations, challenge assumptions and repair misunderstandings without taking over the executive's judgement.	40 minutes	Coach and coachee; involve others only with their agreement	X12 Feedback and challenge agre	165
X13	Participation, agency and expectations	Agree	Create realistic participation commitments while making voluntary choice, competing demands and the right to revise or stop visible.	35 minutes	Coach and coachee; involve others only with their agreement	X13 Participation agency and ex	168
X14	Session preparation and private learning record	Agree	Help the coachee arrive with a useful question and leave with a concise record they can control.	15 minutes before; 10 minutes after each session	Coach and coachee; involve others only with their agreement	X14 Session preparation and pri	171
X15	Leadership lifeline	Assess	Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.	60 minutes	Coach and coachee; involve others only with their agreement	X15 Leadership lifeline	242

X16	Best-work episode review	Assess	Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.	45 minutes	Coach and coachee; involve others only with their agreement	X16 Bestwork episode review	245
X17	Strengths dosage: underuse and overuse	Assess	Explore how the same strength can help or hinder depending on intensity, timing and context.	40 minutes	Coach and coachee; involve others only with their agreement	X17 Strengths dosage underuse a	248
X18	Values trade-off cards	Assess	Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.	45 minutes	Coach and coachee; involve others only with their agreement	X18 Values tradeoff cards	251
X19	Energy and attention diary	Assess	Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.	20 minutes setup; five days of brief entries; 30-minute review	Coach and coachee; involve others only with their agreement	X19 Energy and attention diary	254
X20	Calendar versus contribution audit	Assess	Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.	45 minutes review plus 20 minutes preparation	Coach and coachee; involve others only with their agreement	X20 Calendar versus contributio	257

X21	Critical decision reconstruction	Assess	Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.	55 minutes	Coach and coachee; involve others only with their agreement	X21 Critical decision reconstru	260
X22	Stakeholder perception interviews	Assess	Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.	60 minutes setup/debrief; 15 minutes per interview	Coach and coachee; involve others only with their agreement	X22 Stakeholder perception inte	263
X23	Leadership 360 debrief	Assess	Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.	75 minutes; optional second session	Coach and coachee; involve others only with their agreement	X23 Leadership 360 debrief	266
X24	Assessment-to-experiment bridge	Assess	Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.	50 minutes	Coach and coachee; involve others only with their agreement	X24 Assessmenttoexperiment brid	269

X25	Relationship system map	Assess	See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.	50 minutes	Coach and coachee; involve others only with their agreement	X25 Relationship system map	272
X26	Delegation bottleneck review	Assess	Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.	45 minutes	Coach and coachee; involve others only with their agreement	X26 Delegation bottleneck revie	275
X27	Assumptions and contrary evidence	Assess	Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.	45 minutes	Coach and coachee; involve others only with their agreement	X27 Assumptions and contrary ev	278
X28	Control, influence and system action	Assess	Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.	40 minutes	Coach and coachee; involve others only with their agreement	X28 Control influence and syste	281

X29	Leadership context wheel	Assess	Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.	45 minutes	Coach and coachee; involve others only with their agreement	X29 Leadership context wheel	284
X30	Integrated coaching formulation	Assess	Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.	60 minutes	Coach and coachee; involve others only with their agreement	X30 Integrated coaching formula	287
X31	Describe the preferred future	Activate	Move from a problem-saturated account to a concrete, plausible description of what useful progress would look like.	40 minutes	Coach and coachee; involve others only with their agreement	X31 Describe the preferred futu	338
X32	Find the useful exception	Activate	Identify when a recurring difficulty is absent or less severe and learn what can be deliberately repeated.	35 minutes	Coach and coachee; involve others only with their agreement	X32 Find the useful exception	341
X33	Scaling and one step better	Activate	Use a locally defined scale to make progress and the next feasible move discussable, without treating the number as a test score.	30 minutes	Coach and coachee; involve others only with their agreement	X33 Scaling and one step better	344

X34	Perspective positions	Activate	Explore a difficult interaction from multiple viewpoints while keeping imagined perspectives distinct from actual evidence.	45 minutes	Coach and coachee; involve others only with their agreement	X34 Perspective positions	347
X35	Weighted decision comparison	Activate	Structure a decision with explicit criteria and uncertainty while preserving executive judgement and non-negotiable constraints.	60 minutes	Coach and coachee; involve others only with their agreement	X35 Weighted decision compariso	350
X36	Premortem for a leadership experiment	Activate	Anticipate plausible ways an executive's plan could fail and strengthen safeguards before acting.	40 minutes	Coach and coachee; involve others only with their agreement	X36 Premortem for a leadership	353
X37	Strategic zoom	Activate	Help an executive move between immediate action, organisational interdependence and longer-term consequences before choosing a response.	45 minutes	Coach and coachee; involve others only with their agreement	X37 Strategic zoom	356

X38	Both-and tension map	Activate	Explore recurring tensions that need ongoing balance rather than a once-and-for-all choice between two supposedly opposing virtues.	50 minutes	Coach and coachee; involve others only with their agreement	X38 Bothand tension map	359
X39	Event, interpretation and choice	Activate	Explore how an interpretation influences a work response and develop a more useful, evidence-based choice.	45 minutes	Coach and coachee; involve others only with their agreement	X39 Event interpretation and ch	362
X40	Distanced self-talk for a work decision	Activate	Create a brief reflective distance from a pressured situation so the executive can consider a response more deliberately.	25 minutes	Coach and coachee; involve others only with their agreement	X40 Distanced selftalk for a wo	365
X41	Compassionate challenge after a setback	Activate	Combine a fair account of a work setback with responsibility and a constructive next step, without excusing harm or escalating self-criticism.	35 minutes	Coach and coachee; involve others only with their agreement	X41 Compassionate challenge aft	368

X42	Ambivalence conversation	Activate	Explore both the reasons to change and the reasons to keep a current practice, preserving the executive's autonomy.	45 minutes	Coach and coachee; involve others only with their agreement	X42 Ambivalence conversation	371
X43	Ladder of inference check	Activate	Slow a rapid jump from selected information to action and identify where a checking question could improve judgement.	40 minutes	Coach and coachee; involve others only with their agreement	X43 Ladder of inference check	374
X44	Competing commitments inquiry	Activate	Explore a possible tension between a stated development goal and another legitimate commitment the executive may be protecting.	60 minutes; experienced coach recommended	Coach and coachee; involve others only with their agreement	X44 Competing commitments inqui	377
X45	Courage through graded rehearsal	Activate	Build task-specific readiness for a difficult leadership behaviour through manageable practice rather than waiting for complete confidence.	45 minutes plus short rehearsals	Coach and coachee; involve others only with their agreement	X45 Courage through graded rehe	380

X46	Difficult conversation rehearsal	Activate	Prepare and practise a specific work conversation that combines clarity, inquiry and appropriate accountability.	60 minutes	Coach and coachee; involve others only with their agreement	X46 Difficult conversation rehe	383
X47	Negotiation interests and boundaries	Activate	Prepare an executive for a negotiation by clarifying interests, authority, alternatives and the relationship, rather than scripting a win at any cost.	55 minutes	Coach and coachee; involve others only with their agreement	X47 Negotiation interests and b	386
X48	Conflict response choice	Activate	Expand the executive's response options in a disagreement while treating conflict preferences as hypotheses, not fixed identities.	45 minutes	Coach and coachee; involve others only with their agreement	X48 Conflict response choice	389
X49	SBI feedback rehearsal	Activate	Practise specific feedback that separates observable behaviour and experienced impact from assumptions about the other person's intention.	40 minutes	Coach and coachee; involve others only with their agreement	X49 SBI feedback rehearsal	392

X50	Ask for feedforward	Activate	Invite a small number of practical suggestions for a chosen future behaviour while leaving the coachee free to select what fits.	30 minutes preparation/debrief; 10 minutes per conversation	Coach and coachee; involve others only with their agreement	X50 Ask for feedforward	395
X51	Boundary-setting and saying no	Activate	Help an executive make a clear, respectful limit or trade-off visible without using avoidance, false promises or unnecessary defensiveness.	45 minutes	Coach and coachee; involve others only with their agreement	X51 Boundarysetting and saying	398
X52	Ethical dilemma rehearsal	Activate	Help an executive recognise affected interests, duties and power before choosing a responsible action and appropriate advice.	60 minutes	Coach and coachee; involve others only with their agreement	X52 Ethical dilemma rehearsal	401
X53	Metaphor as a thinking aid	Activate	Use an optional, coachee-generated metaphor to examine a work pattern and identify a practical alternative without assigning hidden symbolic meanings.	35 minutes	Coach and coachee; involve others only with their agreement	X53 Metaphor as a thinking aid	404

X54	Future leadership identity in practice	Activate	Connect an executive's desired way of leading with repeatable present actions, while avoiding a rigid ideal self or an imposed leadership persona.	50 minutes	Coach and coachee; involve others only with their agreement	X54 Future leadership identity	407
X55	Fourteen-day delegation experiment	Apply	Test a clearer delegation agreement in real work, then review ownership, quality and the reasons for any intervention.	35 minutes setup; two weeks application; 30-minute review	Coach and coachee; involve others only with their agreement	X55 Fourteenday delegation expe	445
X56	A new decision-meeting routine	Apply	Test a meeting sequence that connects the decision question, challenge, reasoning and ownership without adding unnecessary ceremony.	30 minutes design; one or two meetings; 30-minute review	Coach and coachee; involve others only with their agreement	X56 A new decisionmeeting routi	448
X57	Strategic calendar sprint	Apply	Protect a small amount of time for an agreed executive contribution and test whether it produces useful work rather than simply a fuller diary.	30 minutes setup; two weeks; 25-minute review	Coach and coachee; involve others only with their agreement	X57 Strategic calendar sprint	451

X58	Stakeholder listening tour	Apply	Practise purposeful executive listening across different roles and turn what is heard into a transparent response, not an unbounded promise.	40 minutes preparation; four short conversations; 45-minute synthesis	Coach and coachee; involve others only with their agreement	X58 Stakeholder listening tour	454
X59	Reciprocal network development	Apply	Strengthen a work relationship through a useful reciprocal exchange rather than treating networking as influence over people.	35 minutes setup; two conversations; 30-minute review	Coach and coachee; involve others only with their agreement	X59 Reciprocal network developm	457
X60	Habit cues and friction	Apply	Make a chosen leadership behaviour easier to repeat by linking it to a reliable cue and changing the immediate work environment.	40 minutes setup; three weeks observation	Coach and coachee; involve others only with their agreement	X60 Habit cues and friction	460
X61	WOOP work experiment	Apply	Combine a feasible wish with an anticipated internal obstacle and a concrete if-then response, while retaining attention to external constraints.	40 minutes	Coach and coachee; involve others only with their agreement	X61 WOOP work experiment	463

X62	Role-crafting proposal	Apply	Explore a small, authorised adjustment to tasks or relationships that better uses capability and supports the role's purpose.	55 minutes	Coach and coachee; involve others only with their agreement	X62 Rolecrafting proposal	466
X63	Confidence through work evidence	Apply	Build a more grounded view of readiness by reviewing specific practice and feedback rather than relying on reassurance or a global confidence rating.	35 minutes setup; two practice opportunities; 30-minute review	Coach and coachee; involve others only with their agreement	X63 Confidence through work evi	469
X64	Targeted behavioural feedback pulse	Apply	Obtain a small amount of feedback on a named work practice without recreating a 360 test or claiming validated measurement.	30 minutes design; short collection; 30-minute review	Coach and coachee; involve others only with their agreement	X64 Targeted behavioural feedba	472
X65	Prospective decision journal	Apply	Create a record of reasoning before outcomes are known so the executive can learn without rewriting the past through hindsight.	20 minutes per decision; 45-minute periodic review	Coach and coachee; involve others only with their agreement	X65 Prospective decision journa	475

X66	Learning-partner check-in	Apply	Create a light, reciprocal support routine for workplace practice without disclosing private coaching content or outsourcing the coach's responsibilities.	20 minutes setup; weekly 15-minute check-ins	Coach and coachee; involve others only with their agreement	X66 Learningpartner checkin	478
X67	After-action review of a difficult conversation	Apply	Learn from a real interaction by comparing intent, behaviour, response and consequences, then choosing a proportionate repair or next practice.	45 minutes	Coach and coachee; involve others only with their agreement	X67 Afteraction review of a dif	481
X68	Setback and restart plan	Apply	Respond constructively when a practice is interrupted, distinguishing an ordinary lapse from an unsuitable goal or a missing condition.	40 minutes	Coach and coachee; involve others only with their agreement	X68 Setback and restart plan	484
X69	Anchored goal-attainment review	Assure	Review progress against predefined, behaviourally specific goal levels while preserving context and avoiding misleading overall scores.	60 minutes	Coach and coachee; involve others only with their agreement	X69 Anchored goalattainment rev	561

X70	Learning and contribution story	Assure	Prepare a credible account of what was learned, applied and observed without claiming that coaching alone caused an organisational result.	60 minutes	Coach and coachee; involve others only with their agreement	X70 Learning and contribution s	564
X71	Six-month maintenance and self-coaching plan	Assure	Help the executive sustain useful practices, notice drift and access support without becoming dependent on the coach.	50 minutes	Coach and coachee; involve others only with their agreement	X71 Sixmonth maintenance and se	567
X72	Closure conversation and future letter	Assure	End the coaching relationship deliberately, recognise learning and clarify what continues, what is shared and what happens to records.	60 minutes; 20-minute optional letter	Coach and coachee; involve others only with their agreement	X72 Closure conversation and fu	570

005 / 04 Assessment Selector

Assessment to coaching action

46 current catalogue offers reviewed. Catalogue descriptions are not technical validation.

Code	Assessment / pathway	Evidence lens	Coaching question	Activity route	Debrief prompts	Workplace follow-through	Caution	Source
CMA	Cultural Match Assessment	Culture-related preferences	Explore the relationship between personal work expectations and the culture experienced, without judging a person as a cultural misfit.	X05, X18, X25	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?	Ask for a concrete example of the desired working condition and negotiate one practical adjustment.	Not a licence to screen out difference or infer values from nationality.	https://hr.delivery/hr-delivery/assessments
PSN	Personal Strengths Navigator	Relative strengths and preferences	Explore useful contribution, energy and the dosage of a strength in a current executive challenge.	X16, X17, X24	Where has this strength helped? | Where has it been too much or absent? | What complementary practice would the task need?	Apply one recognised strength deliberately and seek feedback on its usefulness.	Relative preference does not establish superior capability or justify comparisons between people.	https://hr.delivery/hr-delivery/assessments

FCA	Full Career Assessment	Integrated career exploration	Explore plausible career directions alongside aspirations, actual opportunities and role requirements.	X01, X03, X07	What options does the report open? | What does it leave out about your circumstances? | What real evidence or conversation is needed next?	Arrange one information interview or bounded role exploration.	Not a guarantee of suitability, promotion, employment or a vacancy.	https://hr.delivery/hr-delivery/assessments
BCA	Behavioural Competency Assessment	Competency-related assessment	Discuss development against an explicitly identified role model and appropriate level.	X21, X24, X63	Which behaviour is being assessed? | What evidence from work supports or contradicts the pattern? | What task would let you practise it safely?	Choose a role-relevant practice with feedback and review.	Retain the authorised competency taxonomy; a score is not a complete account of behaviour.	https://hr.delivery/hr-delivery/assessments
TCA	Technical Competency Assessment	Technical evidence	Clarify a technical development need that requires authorised specialist interpretation.	X01, X08, X63	What is the technical requirement? | Who is qualified to interpret this result? | What instruction or supervised practice is needed?	Refer the technical development action to a qualified owner while coaching supports planning and follow-through.	The coach must not confer technical competence, licence or authorisation.	https://hr.delivery/hr-delivery/assessments
LPQ	Learning Preference Questionnaire	Learning preferences	Discuss how the coachee likes to approach learning and broaden their practice options.	X14, X60, X66	What learning approach do you prefer? | When has a different approach worked? | Which method best fits this task?	Test two suitable learning approaches against actual task performance.	Preferences do not establish fixed learning styles or unique instructional effectiveness.	https://hr.delivery/hr-delivery/assessments

CCA	Career Compass Assessment	Career exploration	Examine interests, contribution and possible directions without overriding the executive's own aspirations.	X03, X05, X07	What feels relevant and what does not? | Which aspiration is yours rather than someone else's? | What evidence would clarify an option?	Build a small exploration plan, including real role information and constraints.	Do not prescribe a career path from a profile or treat specialist careers as lesser outcomes.	https://hr.delivery/hr-delivery/assessments
WSI	Work Styles Indicator	Work preferences	Explore communication, pace and decision habits as hypotheses to compare with actual episodes.	X17, X25, X34	When does the description fit? | Where is your behaviour different? | What does the situation require beyond preference?	Try one context-appropriate adjustment in a working relationship.	Avoid fixed types, compatibility scores or explaining every difficulty through style.	https://hr.delivery/hr-delivery/assessments
CRA	Conflict Response Assessment	Conflict-response preferences	Explore a wider range of responses to a specific disagreement.	X27, X46, X48	What is your usual response protecting? | What are the stakes and authority here? | What alternative could fit better?	Rehearse and test a context-specific response.	No conflict mode is universally best; formal harm and safety issues are not style differences.	https://hr.delivery/hr-delivery/assessments
PPP	Personality Pattern Profile	Personality-pattern self-report	Use the report cautiously as language for reflection, with authorised interpretation and work evidence.	X15, X24, X30	What do you recognise? | What is not captured by the profile? | What concrete work hypothesis could be tested?	Select one behaviour, not a new identity, for practice.	Not clinical diagnosis, destiny or a basis for unsupported suitability decisions.	https://hr.delivery/hr-delivery/assessments

RMA	The Relate Map Assessment	Relationship preferences and needs	Explore how the coachee expresses relationship needs and understands others' experience.	X25, X34, X59	What do you need from this relationship? | How do others know that? | What should you ask rather than infer?	Hold one explicit expectations conversation.	Do not infer another person's needs from the coachee's profile or create a compatibility verdict.	https://hr.delivery/hr-delivery/assessments
PIP	Personal Insights Profile	Personal insight	Develop a focused self-reflection question, checking report claims against lived work experience.	X15, X24, X30	What is useful here? | What evidence would qualify the interpretation? | Which next action belongs to you?	Translate one supported insight into a small work experiment.	Confirm the instrument version and technical basis; avoid treating broad descriptions as proof.	https://hr.delivery/hr-delivery/assessments
TWI	Team Workstyles Indicator	Team-level workstyle picture	Explore a team-related coaching question using appropriate team consent and group interpretation.	X25, X56, X58	What is a team pattern rather than your individual score? | Whose experience may be missing? | What team agreement could help?	Use a separately contracted team conversation or a modest coordination experiment.	Aggregate team findings must not be assigned to one leader; use the published minimum and privacy rules.	https://hr.delivery/hr-delivery/assessments
TCP	Team Contribution Profile	Team contribution lens	Discuss complementary contributions and how the team allocates work.	X25, X55, X59	Which contribution is visible or absent? | Is the gap capability, opportunity or allocation? | What agreement could improve it?	Test a clearer contribution or responsibility agreement.	Do not assign fixed team roles or infer individual incapability from a group pattern.	https://hr.delivery/hr-delivery/assessments

TPW	Team Performance WatchPoints	Team conditions	Identify conditions worth investigating in a team-related development goal.	X25, X28, X58	Which condition has evidence? | What could the team and system change? | What is outside an individual coaching contract?	Route systemic concerns to the appropriate team or organisational owner.	A watchpoint is not a diagnosis or proof that the leader caused the condition.	https://hr.delivery/hr-delivery/assessments
MMAC	Managerial Assumptions, Arguments and Conclusions	Reasoning and judgement	Practise distinguishing assumptions, evidence and argument quality in managerial decisions.	X21, X27, X43	What is stated and what is assumed? | What would weaken the conclusion? | What evidence would change your decision?	Use a prospective decision journal and a checking question.	Do not infer personality, integrity or character from a reasoning result.	https://hr.delivery/hr-delivery/assessments
MSJ	Managerial Situational Judgement Test	Scenario judgement	Explore reasoning in managerial situations and rehearse comparable, new work challenges.	X21, X24, X46	Why did the response seem effective? | What competing demand did it address? | How does the actual work context differ?	Rehearse a new, role-relevant situation and gather workplace evidence.	Preserve the report's published structure; do not silently relabel its domains.	https://hr.delivery/hr-delivery/assessments
5D16F	5 Dimension 16 Factor Assessment	Multidimensional management assessment	Explore a specific management-development question with the authorised manual and report.	X24, X30, X63	What exactly does this scale claim to assess? | What evidence supports this use? | What practical learning question follows?	Choose a bounded practice after qualified interpretation.	The name alone does not establish the constructs, validity or permissible decisions.	https://hr.delivery/hr-delivery/assessments

LPP	Leadership Preference Profile	Relative leadership preference	Explore attention across Direction, Development and Delivery without equating preference with capability.	X02, X17, X24	Where is attention naturally drawn? | What does the current role require? | What deliberate contribution could you practise?	Select one less-emphasised but relevant contribution for a work experiment.	Do not seek numerical balance for its own sake or infer absolute competence.	https://hr.delivery/hr-delivery/assessments
LSJ	Leadership Situational Judgement	Leadership scenario judgement	Explore choices and trade-offs in leadership situations, then practise comparable original scenarios.	X21, X35, X52	What made the choice attractive? | What longer-term consequence mattered? | What does real work add to the scenario?	Rehearse a new decision and review the reasoning, not protected answers.	No coaching of live item answers; scenario scores do not perfectly describe workplace behaviour.	https://hr.delivery/hr-delivery/assessments
LEAD360	Leadership 360 Feedback	Multi-source experienced behaviour	Examine differences between self-view and others' experience with privacy protections intact.	X22, X23, X64	What differs across observation groups? | What episode could explain it? | What practice could colleagues observe next?	Use one behavioural experiment and a targeted, consented follow-up.	Never identify raters or treat all perspectives as interchangeable; retain authorised group thresholds.	https://hr.delivery/hr-delivery/assessments
CLA	Contextual Leadership Assessment	Task-specific leadership judgement	Explore how direction and support can be adapted to a particular person's task and circumstances.	X26, X48, X55	What does this task require? | What capability and support are available? | What would a clearer agreement change?	Run a bounded delegation or support experiment.	Do not label a colleague permanently as low readiness or infer a fixed leadership style.	https://hr.delivery/hr-delivery/assessments

SSA	Shadow Self Assessment	Pressure and strength-overuse patterns	Explore a possible trigger-response pattern without pathologising the executive.	X17, X39, X68	What pressure cue do you recognise? | What does the pattern protect? | What alternative response is safe to test?	Agree an early warning cue and a bounded response plan.	Non-clinical; not evidence of psychological danger, disorder or employment unfitness.	https://hr.delivery/hr-delivery/assessments
EQA	Emotional Intelligence Assessment	Work-related emotional capabilities	Explore a specific emotional or interpersonal work behaviour, using authorised interpretation.	X39, X40, X46	What happens in the work episode? | What is within your choice? | What support or boundary is needed?	Rehearse a response and review the experienced impact.	Not a mental-health diagnosis or a substitute for qualified support.	https://hr.delivery/hr-delivery/assessments
NDR	Numerical and Data Reasoning Assessment	Reasoning performance	Clarify a development question about interpreting work data, where assessment is genuinely relevant.	X21, X35, X65	What reasoning demand matters in your role? | Which errors or uncertainties need instruction? | What work task can test learning?	Use relevant data-analysis training and a supported work example.	Ability evidence requires technical interpretation; do not infer motivation or personality.	https://hr.delivery/hr-delivery/assessments
AAR	Abstract and Adaptive Reasoning Assessment	Reasoning performance	Explore a specific need to recognise patterns and adapt reasoning to new information.	X21, X27, X37	What task does this evidence relate to? | What does it not predict? | What supported practice is relevant?	Combine instruction or practice with a real decision review.	Not a global measure of executive potential or proof of everyday adaptability.	https://hr.delivery/hr-delivery/assessments

CPSA	Cognitive Processing and Learning Speed Assessment	Cognitive performance	Consider a narrowly defined learning or processing question with appropriate accommodations.	X08, X24, X63	Is speed actually required by the task? | What access conditions affect interpretation? | What support is useful?	Arrange task-relevant learning support rather than a generic confidence exercise.	Do not infer intelligence or employability beyond the authorised evidence and intended use.	https://hr.delivery/hr-delivery/assessments
AAE	Attention, Accuracy and Error Detection Assessment	Accuracy-related performance	Explore accuracy demands in a relevant task and the work conditions supporting them.	X19, X21, X63	What errors matter in this task? | Which system controls are needed? | What practice or checking routine would help?	Design a supported quality check in actual work.	Do not treat one test as proof of reliability, medical status or safety authorisation.	https://hr.delivery/hr-delivery/assessments
EPPA	Executive Planning and Prioritisation Assessment	Planning and prioritisation judgement	Explore sequencing, constraints and replanning in a complex work task.	X04, X20, X35	What did you prioritise and why? | Which constraint changed the plan? | What would you stop or resequence?	Use a live priority review and prospective decision record.	Check current pilot and technical status; do not present it as validated prediction of executive performance.	https://hr.delivery/hr-delivery/assessments
SRCPS	Systems Reasoning and Complex Problem Solving Assessment	Systems reasoning	Explore a bounded question about interdependencies and competing explanations.	X25, X27, X37	Which relationship did you notice? | What alternative explanation was missed? | What evidence could test the system hypothesis?	Map one real dependency and test a checking question.	A test is not a complete organisational diagnosis or licence to redesign a system alone.	https://hr.delivery/hr-delivery/assessments

DSIM1	Direction Simulation	Simulation evidence	Discuss strategic framing and judgement using authorised simulation feedback.	X02, X21, X37	What decision did the simulation require? | Which evidence changed your view? | How does the real role differ?	Rehearse a new strategic decision and review work evidence.	Simulation performance is not actual business achievement or complete succession readiness.	https://hr.delivery/hr-delivery/assessments
DSIM2	Development Simulation	Simulation evidence	Explore people-development and stakeholder choices in a supported developmental context.	X24, X46, X55	What did the response enable for others? | What context was missing? | What behaviour could be practised safely?	Use a delegation or feedback experiment with consent.	Retain simulation scoring and privacy rules; avoid training participants on protected answers.	https://hr.delivery/hr-delivery/assessments
DSIM3	Delivery Simulation	Simulation evidence	Explore execution, prioritisation and accountability in realistic work decisions.	X04, X35, X56	What did you prioritise? | What risk or dependency mattered? | What would you change in a real work routine?	Test an accountable decision or handover routine.	Do not equate successful simulation completion with operational authorisation.	https://hr.delivery/hr-delivery/assessments
AC03	Career Combination	Career exploration	Use only when the combined career evidence adds something to a specific aspiration or transition question.	X03, X05, X07	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments

AC08	Combined Leadership Assessment	LSJ, competency-based interview and LPP	Clarify whether the process is developmental or consequential before combining judgement, interview and preference evidence.	X21, X24, X30	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC06	General Leadership Development	LSJ, LPP and CLA	Explore leadership judgement, natural emphasis and task-specific adaptation as distinct evidence.	X17, X24, X55	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC05	General Management Development	MMAC, MSJ and 5D16F	Keep reasoning, scenario judgement and the multidimensional report distinct in a management-development question.	X21, X24, X30	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments

AC09	Graduate Potential Combination	Combined early-career evidence	Usually not the first choice for an established executive; require a specific role-transition rationale.	X08, X24, X63	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC10	High Potential Ability Combination	Combined ability evidence	Use only for a clearly defined cognitive-development question with qualified interpretation, not an informal potential label.	X08, X24, X37	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC07	Leadership Discovery Combination	LEAD360, EQA and SSA	Compare experienced behaviour, emotional capability and pressure patterns without assuming one causes another.	X23, X24, X39	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments

AC12	Managerial Execution Combination	Combined execution evidence	Explore a specific planning or execution question rather than purchasing a battery by default.	X04, X24, X56	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC11	Operational Reliability Combination	Combined operational evidence	Relevant only where the executive's development question genuinely concerns the assessed work demands.	X08, X21, X63	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC01	Personal Development Combination	Combined personal-development evidence	Choose a limited developmental question and explain what each component contributes.	X15, X24, X30	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments

AC02	Personal Discovery Combination	PSN, RMA and CRA	Explore contribution, relationship needs and disagreement as complementary perspectives.	X17, X25, X48	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC13	Strategic Leadership Ability Combination	Combined reasoning evidence	Explore specific strategic reasoning demands, not a single verdict about leadership quality.	X21, X35, X37	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments
AC04	Team Combination	Combined team evidence	Requires a separate team purpose, consent and facilitation design; not a proxy rating of the individual leader.	X25, X56, X58	Why is each component needed? | What do the results agree or disagree about? | What real work evidence will test the interpretation?	Select one supported hypothesis and one workplace action; do not add unlike scores together.	Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.	https://hr.delivery/hr-delivery/assessments

Use authorised instruments and current manuals. Check intended purpose, qualification, reliability, validity, norms, language, accessibility and privacy before use. No item banks or test scoring are included.

006 / 05 Session Log

Session record

Record a short agreed focus, not a transcript. Do not place private content in a sponsor report.

Session ID	Date	Minutes	6A focus	Agreed focus	Status	Next action / tool	Shareable summary agreed?

007 / 06 Goal Tracker

Goal and evidence tracker

Keep each goal separate. Goal anchors are local, prospective descriptions, not normed scores.

Goal ID	Goal and prospective anchors	Baseline evidence	Current level -2 to +2 / N/O	Review date	Observed evidence	Status	Next decision

008 / 07 Experiments

Workplace experiments

Track opportunities, attempted behaviour, evidence and the next learning decision.

Experiment ID	Behaviour / opportunity	Start	Review due	Prediction and boundary	Status	Evidence / learning	Next decision

009 / 08 Actions

Agreed actions

Overdue calculations use the as-of date in Setup. Blank dates are not treated as zero.

Action ID	Agreed action	Owner	Due date	6A	Status	Completion date	Days overdue	Check
							Calculated in the Excel workbook	Calculated in the Excel workbook
							Calculated in the Excel workbook	Calculated in the Excel workbook
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	Calculated in the Excel workbook	Calculated in the Excel workbook

010 / 09 Dashboard

Engagement dashboard

Service and follow-through records only. No overall psychological or coaching-success score.

Service / record	Count	Interpretation
Identified sessions	0	Session IDs recorded; not a competence or outcome measure.
Completed sessions	0	Status marked Completed; inspect opportunity and learning separately.
Recorded session hours	0	Valid positive minutes on completed sessions only.
Identified goals	0	Each goal has its own evidence; no aggregate goal score.
Identified experiments	0	An experiment record is not evidence of successful transfer.
Reviewed experiments	0	A learning review has been recorded.
Identified actions	0	Count of action IDs; incomplete records may need attention.

Completed actions	0	Completion status, not proof of benefit.
Overdue open actions	0	Uses the reporting date in Setup.
Action input checks	0	Records requiring an ID, owner, valid status or valid dates.

INTERPRETATION

No live data are entered in this master. Review missing information, opportunities, learning, observed behaviour and system conditions before forming conclusions. An empty dashboard is not a failed engagement.

Action status	Count
Not started	0
In progress	0
Complete	0
Cancelled	0
Experiment decision	**Count**
Continue	0
Adapt	0
Stop	0
Escalate system issue	0
Further evidence	0

011 / 10 Sources

Sources and use boundaries

Source publications, researched methods and original applications are distinguished.

ID	Publication / origin	Used for	URL or supplied source	Evidence / use status
H01	HR Delivery (2026). Coaching and Mentoring at Work. D6 editorial edition.	Supplied 131-page ebook. Governs distinctions, relationship practice, cases and assessment cautions.	Supplied: D6_Coaching_and_Mentoring.pdf	Source publication
H02	HR Delivery (2026). 6A Workplace Coaching System: One-page Framework, second edition.	Controlling six stages, three levels, six enablers and four-part quality lens.	HR_Delivery_Workplace_Coaching_One_Page_Framework.pdf	Source framework
H03	HR Delivery (2026). Workplace Coaching White Paper, second edition.	Organisational rationale, evidence and operating architecture. Maturity labels differ from H04 Appendix M; see edition crosswalk.	HR_Delivery_Workplace_Coaching_White_Paper.pdf	Source publication

H04	HR Delivery (2026). Workplace Coaching Extensive Toolkit, second edition.	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	Source toolkit
H05	HR Delivery. Assessment catalogue.	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	Catalogue / checked 12 October 2026
R01	International Coaching Federation. Code of Ethics (effective 1 April 2025).	Ethical relationship, responsibilities, agreements, confidentiality, conflicts and accountable practice.	https://coachingfederation.org/credentialing/coaching-ethics/icf-code-of-ethics/	Professional standard
R02	International Coaching Federation. 2025 Core Competencies.	Competence reference, not a qualification granted by this toolkit.	https://coachingfederation.org/wp-content/uploads/2025/09/icf-cs-core-competencies-2025.pdf	Professional standard

R03	Global Code of Ethics. Fourth version, December 2025.	Public code and version reference. Apply the professional code governing your actual practice.	https://globalcodeofethics.org/	Professional standard
R04	International Test Commission. International Guidelines for Test Use.	Competent, appropriate and ethical test use, with evidence relevant to intended purpose.	https://www.intestcom.org/page/15	Testing guidance
R05	International Test Commission. Guidelines for Translating and Adapting Tests, second edition.	Translation alone does not establish equivalent measurement or valid interpretation.	https://www.intestcom.org/files/guideline_test_adaptation_2ed.pdf	Testing guidance
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.	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	Research synthesis

R07	Workplace coaching: a meta-analysis and recommendations for advancing the science of coaching (2023). Frontiers in Psychology, article 1204166.	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	Research synthesis
R08	Grant, Curtayne and Burton (2009). Executive coaching enhances goal attainment, resilience and workplace well-being: a randomised controlled study.	A specific multicomponent executive intervention; its results cannot be assigned to a standalone worksheet.	https://doi.org/10.1080/17439760902992456	Primary coaching study
R09	The Open University. Workplace learning: coaching and mentoring, section 5.2.	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	Educational method
R10	McKergow and Jackson. The OSKAR coaching framework.	Outcome, Scaling, Know-how and resources, Affirm and Action, Review. This toolkit uses original executive prompts.	https://sfwork.com/oskar-coaching	Creator method

R11	Motivational Interviewing Network of Trainers. Understanding motivational interviewing.	Collaborative exploration of ambivalence and autonomy; no claim of MI certification or treatment competence.	https://motivationalinterviewing.org/node/11216	Professional method
R12	Center for Creative Leadership. Situation-Behavior-Impact feedback model.	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/	Creator/practitioner method
R13	Marshall Goldsmith. Try Feedforward Instead of Feedback.	Future-oriented suggestions are used with permission; this toolkit supplies an independent workplace application.	https://www.marshallgoldsmith.com/post/try-feedforward-instead-of-feedback	Creator/practitioner method
R14	Kegan and Lahey (2001). The Real Reason People Won't Change.	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	Creator publication

R15	Harvard Program on Negotiation. Difficult conversations resource.	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	Professional education
R16	Neff. Exploring self-compassion through writing.	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/	Creator practice
R17	Locke and Latham (2002). Building a practically useful theory of goal setting and task motivation.	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	Research synthesis
R18	Gollwitzer and Sheeran (2006). Implementation intentions and goal achievement.	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	Research synthesis
R19	WOOP: Wish, Outcome, Obstacle, Plan.	Creator guidance for mental contrasting with implementation intentions; use a feasible, ethical work wish.	https://woopmylife.org/	Creator method

R20	Mental contrasting with implementation intentions: meta-analysis (2021).	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/	Research synthesis
R21	Ryan and Deci (2000). Self-determination theory and the facilitation of intrinsic motivation, social development and well-being.	Autonomy, competence and relatedness inform questions about conditions, not a new diagnostic score.	https://selfdeterminationtheory.org/SDT/documents/2000_RyanDeci_SDT.pdf	Foundational research
R22	University of Michigan, Center for Positive Organizations. Reflected Best Self Exercise.	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/	Licensed resource pointer
R23	University of Michigan, Center for Positive Organizations. Job Crafting Exercise.	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/	Licensed resource pointer

R24	Kross et al. (2014). Self-talk as a regulatory mechanism: how you do it matters.	Experimental self-distancing evidence; our short executive reflection is an adaptation, not clinical treatment.	https://pubmed.ncbi.nlm.nih.gov/24467424/	Primary experimental research
R25	Lally et al. (2010). How are habits formed: modelling habit formation in the real world.	Habit formation varies. Do not promise that a behaviour will become automatic in 21 or 66 days.	https://doi.org/10.1002/ejsp.674	Primary research
R26	Turner-Stokes (2009). Goal attainment scaling in rehabilitation: a practical guide.	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	Method with transfer limitations

012 / 11 Workbook Guide

Using the working toolkit

Read the matching manual guide before using a form or calculation.

Manual links

Every tool index entry shows the guide, working form and example page in the PDF. The Open worksheet link stays inside this workbook. The source T01-T88 IDs are unchanged; X01-X72 are new executive activities.

Privacy

Use one engagement per copy. Do not collect identifiers unnecessarily or share the entire workbook with the sponsor. There is no per-tab confidentiality boundary. Sheet hiding and validation do not provide security.

Dates and zero

As-of date is entered in Setup. Real date cells should contain valid dates, not strings. A valid numerical zero is not missing. Missing inputs suppress calculations or create a visible check.

What calculations mean

Weighted comparisons are discussion aids. Risk products use ordinal labels, not probabilities. ROI scenarios reflect chosen assumptions, not causal attribution. Goal anchors remain separate; no overall coachee score is calculated.

T62 pulse

Enter one response per statement in the mixed-order input table. The source-order view is formula-driven. Use 1-5, N/A or blank. Counts are descriptive; there is no invented overall alliance score.

T74 maturity

Use the sixteen dimension-specific anchors retained from the source extensive toolkit: Ad hoc, Defined, Integrated and Adaptive. N/O means insufficient observation. These differ from the White Paper's labels; the two systems are not combined.

Limits

Live action rows: 40; sessions: 24; experiments: 24; goals: 8. Source registers generally provide 10 or more working rows. Extend formulas, validation and chart ranges deliberately when more capacity is required.

Examples

The three EX tabs contain fictional worked data. They are not participants or benchmarks and do not feed the live dashboard. Do not copy example consent, risk or referral arrangements into live use without appropriate review.

Assessments

The selector reviews 46 website catalogue offers as potential coaching evidence. It does not administer or score those assessments. Use the provider's current technical manual, authorised platform and qualified interpretation.

Operating instructions

Read the guide, agree the activity, record only what helps, review the evidence and decide the next step. A worksheet can be skipped or adapted when it does not serve the coachee's purpose.

013 / T01 Strategic coaching charter

T01 Strategic coaching charter

ALIGN | Two 90-minute workshops plus evidence review and approval over two to three weeks | Manual guide 32 / form 33 / example 34

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use the charter as a procurement brief or individual contract before diagnosis and accountable strategic approval. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

014 / T02 Strategytobehaviour chain

T02 Strategy-to-behaviour chain

ALIGN | 60-90 minutes per priority, followed by validation with people who perform the critical work | Manual guide 35 / form 36 / example 37

Translate strategy into coachable behaviour and observable work evidence.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not force a linear coaching chain where the work moment or principal barrier is still unknown. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

015 / T03 Intervention fit test

T03 Intervention fit test

ALIGN | 45-60 minutes per use case; obtain clinical, legal or employee-relations advice where indicated | Manual guide 38 / form 39 / example 40

Decide whether coaching is the right response.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use this screening tool to make clinical, legal or formal employment judgments beyond participants' competence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

016 / T04 Coaching portfolio map

T04 Coaching portfolio map

ALIGN | Two-hour mapping workshop, annual deep review and quarterly update when demand or evidence changes | Manual guide 41 / form 42 / example 43

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not compare offers by cost or participation alone when purpose, complexity and outcome differ materially. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

017 / T05 Stakeholder and power map

T05 Stakeholder and power map

ALIGN | 60-90 minutes initially; refresh before launch and whenever sponsorship, conflict or authority changes | Manual guide 44 / form 45 / example 46

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not circulate sensitive power hypotheses as factual stakeholder assessments or identifiable coaching intelligence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

018 / T06 Business case canvas

T06 Business case canvas

ALIGN | Half-day design session plus finance and assurance review before investment approval | Manual guide 47 / form 48 / example 49

Secure a decision without inflated benefit claims.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not approve investment from speculative financial returns without alternatives, uncertainty and decision-quality evidence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

019 / T07 Eligibility and equity matr

T07 Eligibility and equity matrix

ALIGN | 90-minute design review; test with representative users and review access data quarterly | Manual guide 50 / form 51 / example 52

Define fair access and identify unintended exclusion.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not treat identical provision as equitable or collect protected information without a necessary, governed purpose. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

020 / T08 Coaching mode decision matr

T08 Coaching mode decision matrix

ALIGN | 45-60 minutes per pathway; specialist review for high-risk, clinical-adjacent or AI-enabled modes | Manual guide 53 / form 54 / example 55

Match delivery mode to need, complexity and risk.

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							

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not select coaching mode where clinical care, technical advice or formal accountability is the primary need. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04 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.

CALCULATION AID | Enter eight non-negative weights and a 0-4 score for every criterion. Weighted scores use a 0-4 scale. Weights need not total 100. A score never overrides suitability, safety or confidentiality.

Measure		Manager	Internal	External	Peer/group	Team	Digital/AI
Weighted comparison		Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook
Weight check	Not entered						
Decision / non-negotiable conditions							

021 / T09 Programme theory of change

T09 Programme theory of change

ALIGN | Half-day workshop plus evidence challenge and stakeholder validation before baseline collection | Manual guide 56 / form 57 / example 58

Make the expected causal chain and assumptions explicit.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not present the theory as proof of causation; it is a testable explanation for evaluation. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

022 / T10 Coaching risk register

T10 Coaching risk register

ALIGN | 90-minute risk workshop; monthly review during pilot and immediate review after any material incident | Manual guide 59 / form 60 / example 61

Identify and control programme risks before delivery.

Risk event + cause	Affected	L	I	Controls	Owner	Residual	Trigger / action	Initial L x I	Input / ownership check
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook
								Calculated in the Excel workbook	Calculated in the Excel workbook

	Calculated in the Excel workbook	Calculated in the Excel workbook
	Calculated in the Excel workbook	Calculated in the Excel workbook

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not replace qualified safeguarding, legal, privacy, security or clinical risk procedures with this general register. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

L and I are local ordinal judgements on 1-5 scales; the product is only a prioritisation aid, not a probability or expected loss. Residual risk requires a fresh discussion after controls.

023 / T11 Governance RACI

T11 Governance RACI

ALIGN | 60-90 minutes to agree; governance approval and review after any role or supplier change | Manual guide 62 / form 63 / example 64

Clarify accountability across the coaching ecosystem.

Decision / activity	R	A	C	I	Confidentiality / conflict boundary

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not assign accountability to a committee or supplier that lacks authority to correct failure. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

024 / T12 Programme readiness gate

T12 Programme readiness gate

ALIGN | 90-minute evidence-based gate meeting after pre-read; specialist sign-off required for unresolved protection items | Manual guide 65 / form 66 / example 67

Confirm minimum conditions for safe launch.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not launch on a conditional protection item unless an authorised owner, deadline and safe interim control exist. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

No average can override a critical failed condition. Enter evidence, a status and an owned response for every applicable criterion. Conditional/adapt entries require a named action before a responsible human decides.

Gate summary	Not assessed

025 / T75 Service blueprint and parti

T75 Service blueprint and participant journey

ALIGN | 2-3 hour workshop plus user validation | Manual guide 68 / form 69 / example 70

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not approve a blueprint based only on staff assumptions; representative participants must test the actual journey. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

026 / T76 Coach capability framework

T76 Coach capability framework

ALIGN | Half-day design; annual evidence and role review | Manual guide 71 / form 72 / example 73

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

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				

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

The framework defines role evidence for Meridian and does not confer a professional credential or universal scope. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

027 / T81 Provider RFP and duediligen

T81 Provider RFP and due-diligence scorecard

ALIGN | Half-day scoring after demonstrations; specialist due diligence as required | Manual guide 74 / form 75 / example 76

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

Requirement	Weight	Provider evidence	Score 0-4	Weighted	Risk / contract condition
Service purpose/model				Calculated in the Excel workbook	
Coach selection/observation				Calculated in the Excel workbook	
Matching/rematch				Calculated in the Excel workbook	
Supervision/CPD				Calculated in the Excel workbook	
Ethics/complaints				Calculated in the Excel workbook	
Data/security/AI				Calculated in the Excel workbook	
Inclusion/access				Calculated in the Excel workbook	
Evaluation/claims				Calculated in the Excel workbook	

Operations/continuity		Calculated in the Excel workbook	
Commercial/value		Calculated in the Excel workbook	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not enter market scoring until decision authority, requirements, mandatory gates and evaluation rules are approved. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

Set weights before reviewing providers. A favourable average does not resolve mandatory ethics, competence, privacy, safeguarding or contract failures. Use one copy of this comparison per provider and retain the evidence.

Weighted score (0-4)	Calculated in the Excel workbook

028 / T82 Implementation workplan and

T82 Implementation workplan and milestone tracker

ALIGN | 30-45 minutes weekly; gate review at each milestone | Manual guide 77 / form 78 / example 79

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

The tracker does not replace the risk register, decision log, change control or formal governance approvals. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

029 / T83 Communications and stakehol

T83 Communications and stakeholder plan

ALIGN | 60-90 minutes; approve before launch or material change | Manual guide 80 / form 81 / example 82

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not promote enrolment before service capacity, participant protections and qualified routes are operational. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

030 / T84 Capacity budget and demand

T84 Capacity, budget and demand model

ALIGN | 90-120 minutes; refresh quarterly and before scope changes | Manual guide 83 / form 84 / example 85

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is a planning model, not budget authority; retain uncertainty and refresh assumptions when demand or scope changes. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

DEMAND / CAPACITY MODEL	Low	Base	High	Assumption / evidence
Eligible / forecast requests				
Uptake proportion				
Start proportion				
Expected starts (unrounded)	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Planned whole starts	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Sessions per planned start				
Session minutes				

Preparation minutes / session				
Administration hours / start				
Total delivery demand hours	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Coaches available				
Available hours per coach				
Usable proportion of capacity				
Available coaching hours	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Capacity gap: available - demand	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Hourly delivery cost				
Fixed programme cost				
Full estimated programme cost	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Cost per planned start	Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Model check	Not entered	Not entered	Not entered	

Expected starts are rounded up for planning whole engagements. Include supervision, rematching, platform, accessibility and overhead costs in the appropriate hourly or fixed cost assumptions. These are planning scenarios, not quotations or confirmed demand.

031 / X01 Executive role mandate

X01 Executive role mandate

ALIGN | 45 minutes together; 20 minutes preparation | Manual guide 86 / form 87 / example 88

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

Purpose of the role

Accountable outcomes

Decisions and boundaries

Expected leadership moments

Unconfirmed expectations

Coaching focus and next step

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01 | Original HR Delivery executive activity

032 / X02 Leadership impact compass

X02 Leadership impact compass

ALIGN | 40 minutes | Manual guide 89 / form 90 / example 91

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.

Situation

Direction impact

Relationship impact

Delivery impact

Consequences to protect

Chosen focus and evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This compass is a reflective organising device. It has no norms, pass mark, ideal shape or overall leadership score. Ask one affected colleague what a useful meeting outcome would look like. Do not present the four areas as a compulsory rating survey.

SOURCE / H01 | Original HR Delivery executive activity

033 / X03 Roletransition bridge

X03 Role-transition bridge

ALIGN | 50 minutes; 15 minutes independent reflection | Manual guide 92 / form 93 / example 94

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

Previous success pattern

New mandate

Retain deliberately

Reduce or release

New practice

Thirty-day bridge

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not assume every promotion requires the same transition or that reluctance reflects psychological resistance. Missing authority and staffing may be the real issue. Record two occasions when an old habit appeared. Note whether it helped, obstructed or was necessary, and bring the evidence without self-blame.

SOURCE / H01 | Original HR Delivery executive activity

034 / X04 Priority and opportunitycos

X04 Priority and opportunity-cost review

ALIGN | 35 minutes | Manual guide 95 / form 96 / example 97

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

Candidate themes

Priority selected

Supporting theme

Effort and displacement

Dependencies

Not-now and trigger

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Ratings, when used, are local discussion aids. Do not turn a weighted priority number into proof of personal worth or business return. Make one actual calendar change and tell the relevant person what is being reduced. Bring evidence that practice time was feasible.

SOURCE / H01 | Original HR Delivery executive activity

035 / X05 Purpose values and leadersh

X05 Purpose, values and leadership choices

ALIGN | 50 minutes | Manual guide 98 / form 99 / example 100

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

Meaningful episode

Value and definition

Second value

Current tension

Chosen action

Purpose in practice

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Participation is voluntary. Do not impose religious, cultural, political or personal values or infer them from nationality, identity or a test profile. Notice one value tension during the week. Record the action and consequence, not a rating of whether you are a good person.

SOURCE / H01, R21 | Original HR Delivery executive activity

036 / X06 Stakeholder value interview

X06 Stakeholder value interview

ALIGN | 45 minutes preparation; three 15-minute interviews | Manual guide 101 / form 102 / example 103

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

Interview purpose

Participants and permissions

Core questions

Pattern found

Alternative explanation

Next experiment

HOW TO USE THIS RECORD

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?

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.

BOUNDARIES AND FOLLOW-THROUGH

Use authorised feedback routes for allegations, misconduct or employment decisions. Do not collect sensitive third-party information that is unnecessary for coaching. Conduct the agreed interviews, share only permitted summaries and note who was missing from the evidence.

SOURCE / H01 | Original HR Delivery executive activity

037 / X07 Twelvemonth future story

X07 Twelve-month future story

ALIGN | 45 minutes | Manual guide 104 / form 105 / example 106

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

Future scene

Observable leadership

Continuing difficulty

Required conditions

Near-term signal

First move

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not present visualisation as a causal mechanism guaranteeing success or replace practical preparation with positive imagery. Read the story before one relevant meeting; afterwards mark which part was observable and which remains an assumption.

SOURCE / H01 | Original HR Delivery executive activity

038 / X08 Is coaching the right help

X08 Is coaching the right help?

ALIGN | 40 minutes | Manual guide 107 / form 108 / example 109

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

Question

Coachable element

Non-coaching element

Alternative support

Fit decision

Next communication

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Significant distress, risk of harm or needs outside competence require an appropriate qualified route. Coaching must not replace urgent help or formal duties. Write one sentence describing the support you have chosen and one condition that would lead you to pause or change it.

SOURCE / H01, H04, R01 | Original HR Delivery executive activity

039 / T13 Fourway contracting canvas

T13 Four-way contracting canvas

AGREE | 45-60 minutes initially, plus 15-30 minutes whenever purpose, role, risk or reporting changes | Manual guide 115 / form 116 / example 117

Align coachee, coach, sponsor and programme owner.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not proceed when sponsorship, goal ownership or confidentiality expectations remain materially incompatible. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04 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.

040 / T14 Coachee agreement

T14 Coachee agreement

AGREE | 20-30 minutes before coaching begins; pause and re-agree after any material service change | Manual guide 120 / form 121 / example 122

Create informed, practical consent for the engagement.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not treat signature as informed agreement when choice, records, exceptions or technology remain unclear. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

041 / T15 Sponsor briefing guide

T15 Sponsor briefing guide

AGREE | 45-minute briefing before nomination or goal-setting, with a 15-minute midpoint boundary refresh | Manual guide 123 / form 124 / example 125

Set expectations and prevent surveillance pressure.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use sponsor briefing to solicit personal disclosures or coach-generated judgments about a participant. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

042 / T16 Confidentiality information

T16 Confidentiality information protocol

AGREE | 60-90 minutes to map each item; qualified review before new data, recipient or technology use | Manual guide 126 / form 127 / example 128

Define every information flow before data is created.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not rely on generic consent where the purpose, recipient, content or legal obligation is specific. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

043 / T17 Roleconflict declaration

T17 Role-conflict declaration

AGREE | 10-15 minutes at matching and rechecked on change; rapid specialist review for material conflicts | Manual guide 129 / form 130 / example 131

Surface dual roles and decide whether they can be managed.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not assume disclosure removes a conflict; material power or information risks may still require rematch. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

044 / T18 Session working agreement

T18 Session working agreement

AGREE | 15-20 minutes in the first session and five minutes to revisit when working needs change | Manual guide 132 / form 133 / example 134

Agree how coach and coachee will work together in the room.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use the working agreement to override a participant's access need, refusal or right to pause. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

045 / T19 Data processing map

T19 Data processing map

AGREE | Half-day lifecycle mapping; technical and privacy review before launch, integration or material platform change | Manual guide 135 / form 136 / example 137

Control personal and sensitive coaching data end to end.

Data element	System / processor	Access	Transfer / country	Retention	Deletion test	Risk / control

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not treat this map as a substitute for qualified privacy, security and records-management assessment. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

046 / T20 Referral and escalation pro

T20 Referral and escalation protocol

AGREE | Two-hour design and tabletop test; immediate qualified consultation when a live trigger occurs | Manual guide 138 / form 139 / example 140

Guide proportionate response when needs exceed coaching boundaries.

Route / trigger	Qualified contact	Primary / backup	Availability	Authority / action	Secure contact / test

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not improvise urgent clinical, safeguarding or legal action from this template; follow qualified local protocol. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04 Localisation required: complete and verify the routes before use. The source's illustrative tier timings are not universal legal or clinical standards.

047 / T21 Rematch and termination gui

T21 Rematch and termination guide

AGREE | 15-30 minutes for routine rematch; immediate review for safety, boundary or conduct concerns | Manual guide 141 / form 142 / example 143

Enable dignified exit without requiring personal disclosure.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not require explanation or continued contact when a participant requests a routine confidential rematch. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

048 / T22 Team coaching contract

T22 Team coaching contract

AGREE | 60-90 minutes before substantive work, with re-contracting after membership, purpose or sponsor changes | Manual guide 144 / form 145 / example 146

Contract a team, its members, leader, sponsor and coach around real work.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use team coaching for a nominal group lacking a shared task, interdependence or safe participation conditions. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

049 / T23 Digital and AI consent noti

T23 Digital and AI consent notice

AGREE | 45-60 minutes to draft; privacy, security and legal review before launch and after any material product or data-use change. | Manual guide 147 / form 148 / example 149

Secure informed use of AI-enabled or recorded coaching.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, H04 | H04

050 / T24 Contract quality audit

T24 Contract quality audit

AGREE | 60-90 minutes per quarterly sample, plus action-owner follow-up within the severity-based deadline. | Manual guide 150 / form 151 / example 152

Check that live agreements meet minimum standards.

Criterion	Single rating	Evidence	Context / uncertainty	Critical gap	Next action	Rating check	
Purpose and parties						Missing	
Voluntariness and rights						Missing	
Goal relevance / ownership						Missing	
Confidentiality and sharing						Missing	
Exceptions / referral						Missing	
Records / technology / AI						Missing	
Access / adjustments						Missing	
Review / rematch / complaint / exit						Missing	
						Calculated in the Excel workbook	

Calculated in the Excel workbook

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not infer coaching quality from paperwork conformity alone or audit confidential session content that is unnecessary to the stated quality purpose. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

Workbook representation uses one rating cell per row instead of the source's multiple response columns. Record observed evidence and critical concerns. Do not average these ratings into accreditation or a pass decision. N/O = not observed.

051 / T78 Matching chemistry and rema

T78 Matching, chemistry and rematch protocol

AGREE | 20-minute intake, 30-minute chemistry check; rematch within SLA | Manual guide 153 / form 154 / example 155

Create a fair, confidential and responsive process for matching coaches and coachees.

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	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not infer fit from protected characteristics, personality profiling or opaque automated matching. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

052 / X09 Chemistry conversation from

X09 Chemistry conversation from the coachee's chair

AGREE | 30 minutes; 10 minutes private reflection | Manual guide 156 / form 157 / example 158

Give the executive an active role in choosing a coach and testing whether the relationship can be useful, safe and appropriately challenging.

Development need

Questions for the coach

Mini-conversation

Experience noticed

Concerns and conditions

Choice

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Chemistry is not proof of competence. Do not imply that a coachee must accept a match because it has already been paid for. After the meeting, privately record one reason to proceed, one concern and one condition. Share only what is necessary to establish the match.

SOURCE / H01, R01 | Original HR Delivery executive activity

053 / X10 Negotiate a shared coaching

X10 Negotiate a shared coaching goal

AGREE | 60 minutes; coach prepares separately with each party | Manual guide 159 / form 160 / example 161

Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.

Sponsor interest

Coachee interest

Shared behavioural goal

Support required

Information agreement

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not disguise a formal performance-improvement process as confidential coaching. Disclose any consequential assessment purpose and establish a separate process. Prepare the wording you are comfortable sharing at a sponsor review; ask the coach to challenge ambiguity before agreeing it.

SOURCE / H01, H02, R01 | Original HR Delivery executive activity

054 / X11 Confidentiality boundaries

X11 Confidentiality boundaries rehearsal

AGREE | 35 minutes | Manual guide 162 / form 163 / example 164

Make the information agreement usable by practising realistic requests before a boundary is put under pressure.

Request

Boundary

Response rehearsal

Permitted alternative

Exception route

Contract update

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Confidentiality duties depend on context and jurisdiction. Verify applicable obligations; this rehearsal is not legal advice. Explain the information agreement back in your own words. Flag any recipient or technology not yet covered.

SOURCE / H01, H04, R01 | Original HR Delivery executive activity

055 / X12 Feedback and challenge agre

X12 Feedback and challenge agreement

AGREE | 40 minutes | Manual guide 165 / form 166 / example 167

Agree how the coach can offer observations, challenge assumptions and repair misunderstandings without taking over the executive's judgement.

Helpful conditions

Unhelpful conditions

Preferred challenge

Rehearsal

Repair phrase

Review point

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Never interpret consent to challenge as consent to humiliation, coercion, unqualified therapy or personal disclosure. Notice one moment when challenge helped and one when it did not. Bring the process detail rather than judging the whole relationship.

SOURCE / H01, R01, R12 | Original HR Delivery executive activity

056 / X13 Participation agency and ex

X13 Participation, agency and expectations

AGREE | 35 minutes | Manual guide 168 / form 169 / example 170

Create realistic participation commitments while making voluntary choice, competing demands and the right to revise or stop visible.

Coachee expectation

Available time

Coachee commitment

Coach commitment

Missed-practice response

Pause or exit

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is not a coachability assessment. Do not score willingness, infer character from missed homework or use participation to decide promotion. Test the practical commitment for one week and return with any changes needed to make it honest and useful.

SOURCE / H01, H02, R21 | Original HR Delivery executive activity

057 / X14 Session preparation and pri

X14 Session preparation and private learning record

AGREE | 15 minutes before; 10 minutes after each session | Manual guide 171 / form 172 / example 173

Help the coachee arrive with a useful question and leave with a concise record they can control.

Episode and question

Facts versus interpretation

Useful session outcome

Learning in my words

Chosen next step

Private and shareable records

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

One engagement per workbook copy. Hiding a tab is not access control; never send the whole working file to a sponsor. Use this record before and after the next session, keeping it short enough to sustain.

SOURCE / H01, H04, R01 | Original HR Delivery executive activity

058 / T25 Readiness and expectations

T25 Readiness and expectations check

ASSESS | 25-40 minutes before goals are agreed; revisit after a major context, capacity or risk change. | Manual guide 206 / form 207 / example 208

Test fit, motivation, capacity and misconceptions.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use readiness language to blame, exclude or coerce someone whose real barrier is workload, access, power or an unresolved organisational process. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

059 / T26 Personrolesystem scan

T26 Person-role-system scan

ASSESS | 45-60 minutes early in coaching, then 15-20 minutes when progress stalls or the context shifts. | Manual guide 209 / form 210 / example 211

Prevent personal development from ignoring role and system causes.

Person Strengths, skills, beliefs, wellbeing and agency

Role Clarity, authority, workload and interfaces

Relationships Stakeholders, trust, conflict and support

System Structure, incentives, culture and resources

Context Change, market, community and identity

Leverage What the coachee can influence

Escalate What requires organisational action

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, H04 | H04

060 / T27 Strengths evidence map

T27 Strengths evidence map

ASSESS | 30-45 minutes in discovery, with a 10-minute update after significant application or feedback. | Manual guide 212 / form 213 / example 214

Ground strengths in situations, outcomes and feedback.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use uncorroborated labels or strengths positivity to bypass capability gaps, overuse risks, harm or difficult contextual evidence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

061 / T28 Critical moments analysis

T28 Critical moments analysis

ASSESS | 35-50 minutes per priority moment; review after the next two or three real occurrences. | Manual guide 215 / form 216 / example 217

Identify the situations in which behaviour matters most.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not generalise from a single reconstructed incident when memory, role power or missing stakeholder evidence could materially change the pattern. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

062 / T29 Stakeholder perspective pla

T29 Stakeholder perspective plan

ASSESS | 30-45 minutes to plan, 15-30 minutes per stakeholder, and 30 minutes to interpret the combined evidence. | Manual guide 218 / form 219 / example 220

Gather useful stakeholder evidence without turning coaching into surveillance.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not gather stakeholder views secretly, solicit broad character judgements or repurpose coaching feedback for appraisal or surveillance. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

063 / T30 Psychometric use check

T30 Psychometric use check

ASSESS | 45-75 minutes for selection review, plus standard administration and a 60-90 minute qualified feedback session. | Manual guide 221 / form 222 / example 223

Use assessments responsibly within their evidence and purpose limits.

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	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use an instrument outside its validated purpose, population, qualified-use conditions or authority for selection, diagnosis or high-stakes decisions. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

No average can override a critical failed condition. Enter evidence, a status and an owned response for every applicable criterion. Conditional/adapt entries require a named action before a responsible human decides.

Gate summary	Not assessed

064 / T31 Goal architecture canvas

T31 Goal architecture canvas

ASSESS | 45-60 minutes after discovery, with 15-minute reviews at agreed milestones. | Manual guide 224 / form 225 / example 226

Create a goal that connects meaning, behaviour, evidence and context.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not finalise an elegant individual goal when the required opportunity, authority, support or organisational ownership is absent. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

065 / T32 Baseline evidence record

T32 Baseline evidence record

ASSESS | 30-60 minutes before intervention; data-quality review before comparison and whenever the measure changes. | Manual guide 227 / form 228 / example 229

Create a proportionate starting point for later comparison.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not present a weak, shifting or inaccessible baseline as proof that coaching caused a later organisational outcome. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

066 / T33 Goal attainment scale

T33 Goal attainment scale

ASSESS | 30-45 minutes to anchor one goal, then 15-20 minutes at the stated review date. | Manual guide 230 / form 231 / example 232

Define meaningful levels of progress before action.

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		

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use Goal Attainment Scaling with vague, overlapping anchors or change the scale after seeing the result to manufacture progress. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

067 / T34 Barrier and leverage map

T34 Barrier and leverage map

ASSESS | 35-50 minutes, followed by a 15-minute evidence review after the first leverage experiment. | Manual guide 233 / form 234 / example 235

Choose the highest-leverage constraints to address.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not ask the coachee to experiment around a barrier that requires formal authority, safeguarding, health, legal or organisational action. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

068 / T35 Learning preference and acc

T35 Learning preference and access profile

ASSESS | 25-40 minutes during early contracting; check effectiveness after two sessions and whenever needs or delivery mode change. | Manual guide 236 / form 237 / example 238

Adapt coaching without stereotyping or unnecessary diagnosis.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not label people with fixed 'learning styles', demand diagnostic disclosure or assume a stated preference is automatically an effective adjustment. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

069 / T36 Coaching formulation

T36 Coaching formulation

ASSESS | 45-60 minutes after discovery, plus 20-30 minutes in supervision when evidence, risk or the working hypothesis changes. | Manual guide 239 / form 240 / example 241

Create a tentative, testable explanation of the development challenge.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not treat a coaching formulation as a diagnosis or settled truth; it remains a provisional explanation to test and revise. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

070 / X15 Leadership lifeline

X15 Leadership lifeline

ASSESS | 60 minutes | Manual guide 242 / form 243 / example 244

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Events selected

Action in the difficult event

Lesson formed

Counterexample

Revised hypothesis

Workplace test

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is not trauma processing. Stop or change the activity if it moves beyond the coaching remit, and use appropriate qualified support when needed. Notice when the old lesson appears in a current decision. Record a supporting and a contrary example before the next session.

SOURCE / H01, H04 | Original HR Delivery executive activity

071 / X16 Bestwork episode review

X16 Best-work episode review

ASSESS | 45 minutes | Manual guide 245 / form 246 / example 247

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

Episode one

Episode two

Strength hypothesis

Enabling conditions

Overuse risk

Application

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is an original episode-review exercise. It is not the licensed Reflected Best Self Exercise and does not reproduce its materials or scoring. Ask one colleague for a concrete example of your useful contribution, with permission to discuss it in coaching.

SOURCE / H01, R22 | Original HR Delivery executive activity

072 / X17 Strengths dosage underuse a

X17 Strengths dosage: underuse and overuse

ASSESS | 40 minutes | Manual guide 248 / form 249 / example 250

Explore how the same strength can help or hinder depending on intensity, timing and context.

Strength

Underuse

Useful range

Overuse

Adjustment cue

Experiment and feedback

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not infer capability, character or risk from a relative preference score. Retain authorised assessment interpretation and avoid forced numerical balance. Record three uses of the strength this week and what the context required in each.

SOURCE / H01, H05, R04 | Original HR Delivery executive activity

073 / X18 Values tradeoff cards

X18 Values trade-off cards

ASSESS | 45 minutes | Manual guide 251 / form 252 / example 253

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Dilemma

Values in tension

Non-negotiable boundary

Options considered

Choice and reason

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is a reflective conversation, not a standardised values assessment. Do not rank people or infer their beliefs from group identity. Explain the trade-off to one relevant colleague and record what their perspective adds.

SOURCE / H01, R21 | Original HR Delivery executive activity

074 / X19 Energy and attention diary

X19 Energy and attention diary

ASSESS | 20 minutes setup; five days of brief entries; 30-minute review | Manual guide 254 / form 255 / example 256

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Observation window

Pattern noticed

Context

Alternative explanations

Experiment

Review evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

No burnout, medical or mental-health score is produced. Participation in energy reflection is optional; persistent symptoms or significant distress require appropriate support. Keep the agreed brief diary, then identify one change in work design rather than a long list of self-improvement tasks.

SOURCE / H01 | Original HR Delivery executive activity

075 / X20 Calendar versus contributio

X20 Calendar versus contribution audit

ASSESS | 45 minutes review plus 20 minutes preparation | Manual guide 257 / form 258 / example 259

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

Period and basis

Categories

Finding

Context

Adjustment

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not impose a supposedly optimal time allocation or use private calendar data beyond the agreed purpose. Run the agreed calendar experiment and bring one example of a protected contribution and one unintended consequence.

SOURCE / H01, H04 | Original HR Delivery executive activity

CALENDAR COMPARISON | Use the same period length, categories and data basis. Hours below are descriptive. An ideal allocation is not supplied; choose what the executive role and circumstances require.

Category	Before hours	After hours	Change in hours	Before share	After share
Decision meetings			Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook
Strategic preparation			Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook
Developing people			Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook
Stakeholder work			Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook
Administration / other			Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook
Total hours	Calculated in the Excel workbook	Calculated in the Excel workbook			

076 / X21 Critical decision reconstru

X21 Critical decision reconstruction

ASSESS | 55 minutes | Manual guide 260 / form 261 / example 262

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

Decision

Known information

Assumption

Pressure and context

Learning

Next-decision prompt

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not infer stable judgement ability from one episode. Respect legal privilege, investigations and restrictions on confidential business information. Use the prospective prompt on a new decision and retain the prediction before the outcome is known.

SOURCE / H01, H04 | Original HR Delivery executive activity

077 / X22 Stakeholder perception inte

X22 Stakeholder perception interviews

ASSESS | 60 minutes setup/debrief; 15 minutes per interview | Manual guide 263 / form 264 / example 265

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

Focus

Contributor plan

Questions

Evidence

Context

Action and follow-up

HOW TO USE THIS RECORD

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?

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.

BOUNDARIES AND FOLLOW-THROUGH

A coaching interview is not an investigation or a validated 360 instrument. Use formal routes for misconduct and qualified administration for standardised tests. Review the permitted summary, mark what fits and what needs context, then choose one observable practice to test.

SOURCE / H01, H05, R04 | Original HR Delivery executive activity

078 / X23 Leadership 360 debrief

X23 Leadership 360 debrief

ASSESS | 75 minutes; optional second session | Manual guide 266 / form 267 / example 268

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

Report boundary

Initial response

Evidence pattern

Context and counterexample

Experiment

Follow-up and sharing

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not reverse-engineer raters, average unlike scales, treat a small group as representative or repeat the full instrument simply to manufacture improvement. Write a short, non-defensive statement of the practice you will try and the specific feedback you will request.

SOURCE / H01, H05, R04, R05 | Original HR Delivery executive activity

079 / X24 Assessmenttoexperiment brid

X24 Assessment-to-experiment bridge

ASSESS | 50 minutes | Manual guide 269 / form 270 / example 271

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

Question and tool

Evidence type

Finding and qualification

Work hypothesis

Experiment

Review evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Use qualified interpretation and authorised reports. No new score, benchmark or test item is created by this bridge. Complete one assessment-to-action record and check it with your practitioner before making a consequential inference.

SOURCE / H01, H05, R04, R05 | Original HR Delivery executive activity

080 / X25 Relationship system map

X25 Relationship system map

ASSESS | 50 minutes | Manual guide 272 / form 273 / example 274

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

Challenge

Roles and flows

Observed pattern

Uncertainty

Small system change

Learning question

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Maps are hypotheses, not proof of influence or hidden motives. Avoid intrusive personal-network data or politically manipulative use. Discuss one mapped dependency with the relevant colleague and invite them to correct the map.

SOURCE / H01, H04 | Original HR Delivery executive activity

081 / X26 Delegation bottleneck revie

X26 Delegation bottleneck review

ASSESS | 45 minutes | Manual guide 275 / form 276 / example 277

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

Task

Original gap

Take-back trigger

Diagnosis hypothesis

Revised agreement

Trial evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use delegation experiments for work requiring unprovided qualifications, unsafe independence or authority the colleague does not have. Ask the colleague what would make the next delegation clearer, then agree the trial jointly.

SOURCE / H01, H05 | Original HR Delivery executive activity

082 / X27 Assumptions and contrary ev

X27 Assumptions and contrary evidence

ASSESS | 45 minutes | Manual guide 278 / form 279 / example 280

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

Observed event

Initial interpretation

Supporting and contrary evidence

Alternatives

Information action

Provisional conclusion

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use this to invalidate reports of discrimination, bullying or safety concerns. Appropriate formal routes remain available. Capture one interpretation during the week and one piece of evidence that could change it.

SOURCE / H01, H04 | Original HR Delivery executive activity

083 / X28 Control influence and syste

X28 Control, influence and system action

ASSESS | 40 minutes | Manual guide 281 / form 282 / example 283

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

Challenge

Within authority

Requires agreement

System action

Immediate step

Review trigger

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not suggest that injustice, unsafe conditions or systemic barriers can be solved solely by changing the coachee's attitude. Take one action in your authority and one request to the correct owner. Bring the response, including refusal or uncertainty.

SOURCE / H01 | Original HR Delivery executive activity

084 / X29 Leadership context wheel

X29 Leadership context wheel

ASSESS | 45 minutes | Manual guide 284 / form 285 / example 286

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

Mandate

Relationships

Resources

Capability and feedback

Priority condition

Review evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

The wheel is not a validated readiness, wellbeing or leadership assessment. Avoid fixed cut-offs, colour-only judgements or comparisons between people. Revisit one condition after a real work event and record what changed in evidence, not just the rating.

SOURCE / H01, H02 | Original HR Delivery executive activity

085 / X30 Integrated coaching formula

X30 Integrated coaching formulation

ASSESS | 60 minutes | Manual guide 287 / form 288 / example 289

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

Goal

Evidence

Working pattern

Alternative explanation

Leverage points

Test and review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

A coaching formulation is a shared work hypothesis, not a clinical diagnosis, hidden personality analysis or automatic employment decision. Read the formulation privately, edit anything that does not fit, then choose the first experiment you genuinely own.

SOURCE / H01, H04, R04 | Original HR Delivery executive activity

086 / T37 Session planning canvas

T37 Session planning canvas

ACTIVATE | 10-15 minutes before a routine session; 20-30 minutes where complexity or boundary risk needs review. | Manual guide 296 / form 297 / example 298

Prepare without scripting or controlling the coachee's agenda.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use session planning to script the conversation, impose the coach's agenda or avoid responding to an emergent risk or priority. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

087 / T38 GROW conversation guide

T38 GROW conversation guide

ACTIVATE | 20-45 minutes for a focused GROW conversation, with a brief check-in on the agreed follow-up date. | Manual guide 299 / form 300 / example 301

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

Goal What would make this useful?

Reality What is happening; what evidence and meaning?

Options What else; consequences; resources?

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

Contract check Whose goal is this?

Follow-up When and how progress is reviewed

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use GROW when a directive, formal performance, investigation, crisis or specialist-support conversation is actually required. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

088 / T39 CLEAR conversation guide

T39 CLEAR conversation guide

ACTIVATE | 45-75 minutes for a full CLEAR cycle; relationship and action review at the next session. | Manual guide 302 / form 303 / example 304

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

Contract Purpose and way of working

Listen Story, emotion, system and silence

Explore Patterns, assumptions and alternatives

Action Chosen experiment or decision

Review Learning about topic and relationship

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use CLEAR as a linear script or continue relational exploration beyond coaching competence when clinical or safeguarding support is indicated. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

089 / T40 OSKAR solutionfocused guide

T40 OSKAR solution-focused guide

ACTIVATE | 20-40 minutes, with a 10-15 minute scaling and progress review after the next action opportunity. | Manual guide 305 / form 306 / example 307

Build on desired outcome, existing resources and small steps.

Outcome What do you want instead?

Scaling Where are you now, 0-10?

Know-how What is already working?

Affirm/action Which resource and next step?

Review What improved and how?

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use solution focus to bypass harm, grief, discrimination, conflict facts or root causes that first require acknowledgement and action. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

090 / T41 Powerful question planner

T41 Powerful question planner

ACTIVATE | 15-25 minutes to plan and rehearse, then 10 minutes to review selected questions after use. | Manual guide 308 / form 309 / example 310

Create concise inquiry without interrogation or hidden advice.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not mistake provocative wording for a powerful question; hidden advice, stacked questions and unnecessary cognitive load reduce agency. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

091 / T42 Listening observation sheet

T42 Listening observation sheet

ACTIVATE | 30-60 minutes of observed practice and 30-45 minutes for evidence-based feedback and development planning. | Manual guide 311 / form 312 / example 313

Develop listening beyond facts and chronology.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not observe or record without explicit consent, trained interpretation and proportionate controls for confidential material. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

092 / T43 Challenge with permission

T43 Challenge with permission

ACTIVATE | 10-20 minutes within a session, including consent and repair; revisit impact before or at the next session. | Manual guide 314 / form 315 / example 316

Offer observations that increase awareness without imposing a verdict.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not challenge to display insight, force disclosure or win an interpretation, especially where power makes refusal or disagreement unsafe. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

093 / T44 Valuestochoice map

T44 Values-to-choice map

ACTIVATE | 30-45 minutes for one dilemma, with a 15-minute review after the decision has been tested in practice. | Manual guide 317 / form 318 / example 319

Clarify competing values and make deliberate trade-offs.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not frame a decision as a values conflict when legal duties, safety requirements or organisational authority remove one of the apparent options. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

094 / T45 Assumption testing canvas

T45 Assumption testing canvas

ACTIVATE | 35-45 minutes; 10-minute review after the test | Manual guide 320 / form 321 / example 322

Turn a limiting certainty into a safe test.

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

HOW TO USE THIS RECORD

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.

04 Generate at least two plausible explanations for the same observations.

05 Run the smallest safe test, compare predictions and update the assumption.

BOUNDARIES AND FOLLOW-THROUGH

Do not use assumption testing to dismiss a verified constraint or expose anyone to a high-stakes test. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

095 / T46 Immunitytochange map

T46 Immunity-to-change map

ACTIVATE | 60-90 minutes; revisit only after a safe test | Manual guide 323 / form 324 / example 325

Explore hidden commitments that compete with a desired change.

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

HOW TO USE THIS RECORD

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.

04 Translate recurring worries into a competing commitment and big assumption.

05 Design a low-risk assumption test, then review evidence without forcing change.

BOUNDARIES AND FOLLOW-THROUGH

Do not treat the map as diagnosis or explore trauma-related protection without consent, competence and an appropriate route. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

096 / T47 Decision quality canvas

T47 Decision quality canvas

ACTIVATE | 45-60 minutes; up to 90 for material decisions | Manual guide 326 / form 327 / example 328

Improve strategic decisions without supplying the answer.

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

HOW TO USE THIS RECORD

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.

04 Generate credible options, including conditions, delay and no action.

05 Name likely biases, seek disconfirming challenge and record the decision rationale.

BOUNDARIES AND FOLLOW-THROUGH

This canvas supports judgment; it does not replace engineering, commercial, legal, safety or delegated-authority due diligence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

097 / T48 Difficult conversation rehe

T48 Difficult conversation rehearsal

ACTIVATE | 30-45 minutes; repeat briefly before the conversation | Manual guide 329 / form 330 / example 331

Prepare a high-stakes conversation through practice and feedback.

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

HOW TO USE THIS RECORD

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.

04 Explore the counterpart's plausible perspective without inventing certainty.

05 Rehearse opening, difficult responses, listening and a specific workable close.

BOUNDARIES AND FOLLOW-THROUGH

Do not rehearse an informal conversation where safety, harassment, grievance or another protected formal process requires specialist handling. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

098 / T49 Feedback and feedforward pl

T49 Feedback and feedforward planner

ACTIVATE | 30-45 minutes plus a 15-minute pattern review | Manual guide 332 / form 333 / example 334

Seek behavioural evidence and turn it into future action.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not gather covert feedback or repurpose developmental observations for an undisclosed employment decision. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

099 / T50 Session close and commitmen

T50 Session close and commitment

ACTIVATE | 10-15 minutes at every session close | Manual guide 335 / form 336 / example 337

Consolidate learning and create accountable next action.

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

HOW TO USE THIS RECORD

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.

04 Check feasibility, risk, support and what remains deliberately unshared.

05 Confirm how evidence will be noticed and when commitment will be reviewed.

BOUNDARIES AND FOLLOW-THROUGH

Do not force a commitment when reflection, consent, competence or operational safety requires pause or referral. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

100 / X31 Describe the preferred futu

X31 Describe the preferred future

ACTIVATE | 40 minutes | Manual guide 338 / form 339 / example 340

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

Current question

Preferred scene

First observable difference

Existing exception

Action

Evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, H04, R10 | Original HR Delivery executive activity

X32 Find the useful exception

ACTIVATE | 35 minutes | Manual guide 341 / form 342 / example 343

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

Usual pattern

Exception

Different conditions

Repeatable element

Non-transferable condition

Next test

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use exceptions to dismiss a person's account of persistent barriers or to suggest that serious harm is solved by positive thinking. Notice and record one small exception without forcing it to become a success narrative.

SOURCE / H01, R10 | Original HR Delivery executive activity

102 / X33 Scaling and one step better

X33 Scaling and one step better

ACTIVATE | 30 minutes | Manual guide 344 / form 345 / example 346

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

Scale question

Anchors

Current position

Existing resource

One-step action

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

No normative comparison or psychometric interpretation is justified. Keep confidence, readiness, importance and performance as different questions. Take the one-step action and return with a work example, whether or not the number changes.

SOURCE / H01, H04, R10 | Original HR Delivery executive activity

X34 Perspective positions

ACTIVATE | 45 minutes | Manual guide 347 / form 348 / example 349

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

Own view

Imagined other view

Observer view

Assumptions to check

Next question

Behavioural adjustment

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is perspective-taking, not mind-reading or a diagnostic technique. Do not infer hidden motives, trauma or identity from imagined roles. Ask one checking question in the real relationship and revise the imagined perspective accordingly.

SOURCE / H01, H04 | Original HR Delivery executive activity

104 / X35 Weighted decision compariso

X35 Weighted decision comparison

ACTIVATE | 60 minutes | Manual guide 350 / form 351 / example 352

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

Decision

Options and constraints

Criteria and weights

Evidence and scores

Uncertainty

Decision and review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Scores are local judgements, not probabilities or validated scales. Do not use the matrix to conceal mandatory legal, safety or ethical constraints. Obtain one missing piece of evidence and rerun only the relevant comparison; document any change in reasoning.

SOURCE / H01, H04 | Original HR Delivery executive activity

OPTION COMPARISON | Agree criteria and weights before rating. Use five weights in percentage points totalling 100, and option scores 0-4. Keep ethical and operational constraints separate from this arithmetic.

Criterion	Weight points	Option A	Option B	Option C	Evidence / assumption
Weighted score 0-4		Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook	
Weight check	Not entered				

105 / X36 Premortem for a leadership

X36 Premortem for a leadership experiment

ACTIVATE | 40 minutes | Manual guide 353 / form 354 / example 355

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

Experiment

Possible failure

Early signal

Prevention

Stop or recovery

Revised plan

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is an original risk-rehearsal activity, not a prediction model. Do not allow imagined failure to become evidence against a person. Add the two most useful safeguards to the experiment plan and test whether they helped.

SOURCE / H01, H04 | Original HR Delivery executive activity

106 / X37 Strategic zoom

X37 Strategic zoom

ACTIVATE | 45 minutes | Manual guide 356 / form 357 / example 358

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

Immediate issue

System view

Longer-term view

Trade-off

Chosen response

Review signal

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Long-range scenarios are not forecasts. Do not use strategic language to bypass urgent safety, employment or technical responsibilities. Apply the three lenses to one upcoming decision and record which lens actually changed your choice.

SOURCE / H01, H04 | Original HR Delivery executive activity

107 / X38 Bothand tension map

X38 Both-and tension map

ACTIVATE | 50 minutes | Manual guide 359 / form 360 / example 361

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

Tension

Value of pace

Value of challenge

Overuse risks

Routine

Review signals

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not frame discrimination, unsafe conduct or a mandatory standard as a polarity to balance. Use the appropriate formal decision route. Ask a colleague to notice one agreed warning signal and discuss it without assigning blame.

SOURCE / H01, H04 | Original HR Delivery executive activity

108 / X39 Event interpretation and ch

X39 Event, interpretation and choice

ACTIVATE | 45 minutes | Manual guide 362 / form 363 / example 364

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

Event

Interpretation

Response and consequence

Balanced account

Chosen response

Test and review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, H04 | Original HR Delivery executive activity

109 / X40 Distanced selftalk for a wo

X40 Distanced self-talk for a work decision

ACTIVATE | 25 minutes | Manual guide 365 / form 366 / example 367

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

Situation

Initial self-talk

Distanced prompt

New perspective

Action sentence

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, R24 | Original HR Delivery executive activity

110 / X41 Compassionate challenge aft

X41 Compassionate challenge after a setback

ACTIVATE | 35 minutes | Manual guide 368 / form 369 / example 370

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

Setback

Harsh judgement

Fair account

Responsibility

Repair action

Learning step

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, R16 | Original HR Delivery executive activity

111 / X42 Ambivalence conversation

X42 Ambivalence conversation

ACTIVATE | 45 minutes | Manual guide 371 / form 372 / example 373

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

Current practice

Reasons to keep it

Reasons to change

Conditions needed

Chosen next step

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, R11, R21 | Original HR Delivery executive activity

112 / X43 Ladder of inference check

X43 Ladder of inference check

ACTIVATE | 40 minutes | Manual guide 374 / form 375 / example 376

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

Observation

Selected information

Meaning and assumption

Conclusion and action

Alternative path

Checking question

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

The sequence is an explanatory aid, not a validated assessment of bias or proof of another person's motives. Use the checking question once and record whether new information changed the conclusion.

SOURCE / H01, H04 | Original HR Delivery executive activity

113 / X44 Competing commitments inqui

X44 Competing commitments inquiry

ACTIVATE | 60 minutes; experienced coach recommended | Manual guide 377 / form 378 / example 379

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

Stated goal

Counter-behaviour

Possible competing commitment

Assumption

Safe test

Learning criterion

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, H04, R14 | Original HR Delivery executive activity

114 / X45 Courage through graded rehe

X45 Courage through graded rehearsal

ACTIVATE | 45 minutes plus short rehearsals | Manual guide 380 / form 381 / example 382

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

Target behaviour

Practice ladder

First step

Feedback

Support and boundary

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is work-skill rehearsal, not exposure therapy. Do not use it for clinical anxiety, trauma or unsafe workplace conditions. Complete the agreed first real-world step and record the behaviour, response and learning.

SOURCE / H01, H04 | Original HR Delivery executive activity

115 / X46 Difficult conversation rehe

X46 Difficult conversation rehearsal

ACTIVATE | 60 minutes | Manual guide 383 / form 384 / example 385

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

Conversation

Opening

Likely response

Listening response

Boundary and agreement

Follow-up

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not coach someone to manipulate, threaten or bypass formal employment procedures. Obtain appropriate advice for consequential or legally sensitive conversations. Hold the conversation when properly prepared; afterwards use X67 to review what actually happened.

SOURCE / H01, R12, R15 | Original HR Delivery executive activity

116 / X47 Negotiation interests and b

X47 Negotiation interests and boundaries

ACTIVATE | 55 minutes | Manual guide 386 / form 387 / example 388

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

Issue

M-07's interests

Other interests to check

Authority and limits

Proposal and alternative

Agreement record

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Negotiation preparation is not legal or procurement advice. Do not encourage deception, discriminatory leverage or commitments beyond authority. Check one assumed interest with the other party and update the proposal before negotiating.

SOURCE / H01, R15 | Original HR Delivery executive activity

117 / X48 Conflict response choice

X48 Conflict response choice

ACTIVATE | 45 minutes | Manual guide 389 / form 390 / example 391

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

Disagreement

Usual response

Cost

Alternative

Opening

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use conflict styles to label colleagues or require reconciliation in cases of harm. Formal and specialist routes remain available. Try the agreed response in an appropriate situation and collect evidence of its effect, not just whether conflict reduced.

SOURCE / H01, H05 | Original HR Delivery executive activity

118 / X49 SBI feedback rehearsal

X49 SBI feedback rehearsal

ACTIVATE | 40 minutes | Manual guide 392 / form 393 / example 394

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

Situation

Behaviour

Impact

Inquiry

Next step

Rehearsal learning

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Feedback must not be a disguised attack or an invented consensus. Do not use a coaching rehearsal to bypass formal duties or specialist procedures. Use the feedback when appropriate and ask the recipient what they understood, without demanding agreement.

SOURCE / H01, R12 | Original HR Delivery executive activity

119 / X50 Ask for feedforward

X50 Ask for feedforward

ACTIVATE | 30 minutes preparation/debrief; 10 minutes per conversation | Manual guide 395 / form 396 / example 397

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

Goal

Contributors

Request

Suggestions

Choice

Follow-up

HOW TO USE THIS RECORD

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?

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.

BOUNDARIES AND FOLLOW-THROUGH

Future suggestions complement rather than replace necessary feedback about actual harm, performance or required standards. Make the agreed requests, select one suggestion and bring a record of the experiment, not just the advice received.

SOURCE / H01, R13 | Original HR Delivery executive activity

120 / X51 Boundarysetting and saying

X51 Boundary-setting and saying no

ACTIVATE | 45 minutes | Manual guide 398 / form 399 / example 400

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

Request

Constraint

Response

Alternative

Persistent challenge

Follow-up

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use boundary language to evade duties, deny reasonable access or disregard an urgent safety obligation. Seek appropriate advice when obligations are unclear. Use the response in a legitimate situation and record the trade-off that was actually agreed.

SOURCE / H01 | Original HR Delivery executive activity

121 / X52 Ethical dilemma rehearsal

X52 Ethical dilemma rehearsal

ACTIVATE | 60 minutes | Manual guide 401 / form 402 / example 403

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

Dilemma

Facts and uncertainty

Affected interests

Boundary

Next action

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is ethical reflection, not legal advice or an investigation. Immediate risk and formal reporting duties take priority over completing the worksheet. Identify the actual advice route before using the rehearsal in a live consequential situation.

SOURCE / H01, H04, R01 | Original HR Delivery executive activity

122 / X53 Metaphor as a thinking aid

X53 Metaphor as a thinking aid

ACTIVATE | 35 minutes | Manual guide 404 / form 405 / example 406

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

Image

Meaning

What it reveals

What it misses

Practical alternative

Experiment

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not interpret drawings or metaphors as diagnostic evidence, hidden trauma or unconscious truth. The coachee controls meaning and disclosure. Use the practical action once; keep the metaphor only if it continues to clarify the work.

SOURCE / H01, H04 | Original HR Delivery executive activity

123 / X54 Future leadership identity

X54 Future leadership identity in practice

ACTIVATE | 50 minutes | Manual guide 407 / form 408 / example 409

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

Desired description

Observable practices

Existing evidence

Habit in tension

Small action

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not impose a culturally narrow executive ideal or require the coachee to suppress identity, values or legitimate emotion to appear credible. Practise the one chosen behaviour and ask a trusted colleague what they actually experienced.

SOURCE / H01, H04, R21 | Original HR Delivery executive activity

124 / T51 Workplace experiment canvas

T51 Workplace experiment canvas

APPLY | 30-45 minutes; specialist approval for material risk | Manual guide 415 / form 416 / example 417

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not run a workplace experiment whose failure could create unmanaged safety, legal, employment or material project harm. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

125 / T52 Implementation intention

T52 Implementation intention

APPLY | 15-25 minutes; review after three cue events | Manual guide 418 / form 419 / example 420

Convert intent into an if-then cue and response.

Goal Desired behaviour

If cue Specific time, place, signal or event

Then response Observable action

Friction Likely barrier

Support Environment or person

Tracking Simple evidence

Recovery What to do after a miss

HOW TO USE THIS RECORD

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.

04 Remove environmental friction and arrange proportionate support or reminders.

05 Track three cue events, then simplify or strengthen the intention from evidence.

BOUNDARIES AND FOLLOW-THROUGH

An implementation intention cannot overcome a missing authority, opportunity or resource that makes the response impossible. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

126 / T53 Stakeholder support agreeme

T53 Stakeholder support agreement

APPLY | 30-45 minutes jointly; re-contract after role change | Manual guide 421 / form 422 / example 423

Mobilise opportunity and feedback without sharing private coaching content.

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

HOW TO USE THIS RECORD

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.

04 Define observable feedback and when it will be offered privately.

05 Set information boundaries, record commitments and review after the opportunity.

BOUNDARIES AND FOLLOW-THROUGH

Do not turn stakeholder support into surveillance, compelled disclosure or control of the coachee's choices. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

127 / T54 Manager transfer conversati

T54 Manager transfer conversation

APPLY | 30-45 minutes at goal, midpoint and transfer review | Manual guide 424 / form 425 / example 426

Enable the manager to support application within contracted boundaries.

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

HOW TO USE THIS RECORD

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.

04 Choose behavioural evidence both parties may discuss at review.

05 Restate confidentiality and employment-use boundaries before confirming the next check-in.

BOUNDARIES AND FOLLOW-THROUGH

Do not combine this transfer conversation with performance adjudication or requests for private coaching content. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

128 / T55 Afteraction review

T55 After-action review

APPLY | 20-30 minutes, preferably within 48 hours | Manual guide 427 / form 428 / example 429

Learn quickly from a workplace experiment or event.

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

HOW TO USE THIS RECORD

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.

04 Identify what helped, hindered and sat outside participants' control.

05 Carry one lesson into the next action, support or environmental change.

BOUNDARIES AND FOLLOW-THROUGH

Use the organisation's incident or investigation process, not an after-action review, where accountability or evidence preservation is formal. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

129 / T56 Habit and environment desig

T56 Habit and environment design

APPLY | 30-45 minutes; test for two to four weeks | Manual guide 430 / form 431 / example 432

Make new behaviour easier to repeat under pressure.

Behaviour Tiny repeatable action

Cue Reliable trigger

Environment Make desired behaviour easy

Friction Make old pattern harder

Reward Immediate meaningful reinforcement

Social support Who notices or joins

Tracking Light-touch evidence

HOW TO USE THIS RECORD

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.

04 Increase friction around the old response without creating new risk.

05 Select an immediate meaningful reward and review repetition, not perfection.

BOUNDARIES AND FOLLOW-THROUGH

Habit design cannot resolve a structural barrier, unsafe workload or missing decision right that needs organisational action. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

130 / T57 Relapse and pressure plan

T57 Relapse and pressure plan

APPLY | 30-45 minutes before closure or predictable pressure | Manual guide 433 / form 434 / example 435

Protect new behaviour when workload or emotion rises.

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

HOW TO USE THIS RECORD

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.

04 Agree a brief reset sequence for use after any lapse.

05 Confirm consented support, escalation limits and a post-event learning review.

BOUNDARIES AND FOLLOW-THROUGH

This plan is not a crisis, safeguarding or clinical response; activate the qualified route when those thresholds are met. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

131 / T58 90day transfer plan

T58 90-day transfer plan

APPLY | 45-60 minutes plus brief monthly reviews | Manual guide 436 / form 437 / example 438

Sequence application, feedback and consolidation beyond sessions.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Treat the phases as a review scaffold, not a rigid schedule when role, risk or opportunity changes materially. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

132 / T59 Learning journal

T59 Learning journal

APPLY | 10-15 minutes per entry; monthly pattern review | Manual guide 439 / form 440 / example 441

Capture evidence and reflection without storing unnecessary sensitive detail.

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

HOW TO USE THIS RECORD

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.

04 Compare entries to identify contextual patterns and exceptions.

05 Select one learning question or experiment and remove unnecessary sensitive detail.

BOUNDARIES AND FOLLOW-THROUGH

A learning journal must remain optional and private unless specific access and use have been freely agreed. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

133 / T60 Closure and sustainment pla

T60 Closure and sustainment plan

APPLY | 45-60 minutes plus a 90-day follow-up | Manual guide 442 / form 443 / example 444

End the engagement deliberately and preserve autonomy.

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

HOW TO USE THIS RECORD

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.

04 Agree proportionate support and boundaries for the sustainment period.

05 Define warning signs, resets, follow-up date and secure record closure.

BOUNDARIES AND FOLLOW-THROUGH

Do not close coaching while an unresolved safety, ethical, complaint or continuity issue still requires accountable action. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

134 / X55 Fourteenday delegation expe

X55 Fourteen-day delegation experiment

APPLY | 35 minutes setup; two weeks application; 30-minute review | Manual guide 445 / form 446 / example 447

Test a clearer delegation agreement in real work, then review ownership, quality and the reasons for any intervention.

Task and permission

Agreement

Prediction

Observed practice

Result and limits

Next decision

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not transfer accountability without authority or use high-risk tasks for unsupervised experimentation. Formal competence requirements remain unchanged. Run only the agreed task, retain minimal evidence and bring both the useful and unhelpful effects to review.

SOURCE / H01, H04 | Original HR Delivery executive activity

135 / X56 A new decisionmeeting routi

X56 A new decision-meeting routine

APPLY | 30 minutes design; one or two meetings; 30-minute review | Manual guide 448 / form 449 / example 450

Test a meeting sequence that connects the decision question, challenge, reasoning and ownership without adding unnecessary ceremony.

Meeting

New sequence

Preparation

Observation

Feedback

Next version

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not treat participation counts or apparent agreement as decision quality. Preserve required technical review and formal decision rights. Use the routine, keep the decision record and ask two precise questions about clarity and opportunity to contribute.

SOURCE / H01, H04 | Original HR Delivery executive activity

136 / X57 Strategic calendar sprint

X57 Strategic calendar sprint

APPLY | 30 minutes setup; two weeks; 25-minute review | Manual guide 451 / form 452 / example 453

Protect a small amount of time for an agreed executive contribution and test whether it produces useful work rather than simply a fuller diary.

Contribution

Time plan

Displacement

Boundary

Evidence

Adjustment

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

No ideal executive time percentage is implied. Do not equate calendar discipline with personal virtue or ignore unrealistic organisational demand. Complete the sprint and compare booked time, used time, output quality and burden on others.

SOURCE / H01 | Original HR Delivery executive activity

137 / X58 Stakeholder listening tour

X58 Stakeholder listening tour

APPLY | 40 minutes preparation; four short conversations; 45-minute synthesis | Manual guide 454 / form 455 / example 456

Practise purposeful executive listening across different roles and turn what is heard into a transparent response, not an unbounded promise.

Purpose

Contributors

Script

Themes

Response

Feedback loop

HOW TO USE THIS RECORD

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?

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.

BOUNDARIES AND FOLLOW-THROUGH

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. Complete the conversations, then close the loop with a factual response that includes limits.

SOURCE / H01, H04 | Original HR Delivery executive activity

138 / X59 Reciprocal network developm

X59 Reciprocal network development

APPLY | 35 minutes setup; two conversations; 30-minute review | Manual guide 457 / form 458 / example 459

Strengthen a work relationship through a useful reciprocal exchange rather than treating networking as influence over people.

Relationship

Shared need

Offer

Request

Action

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use coaching to cultivate improper favours, manipulate vulnerable people or bypass procurement and governance rules. Make the agreed contribution first and review the actual coordination benefit rather than the number of contacts made.

SOURCE / H01 | Original HR Delivery executive activity

139 / X60 Habit cues and friction

X60 Habit cues and friction

APPLY | 40 minutes setup; three weeks observation | Manual guide 460 / form 461 / example 462

Make a chosen leadership behaviour easier to repeat by linking it to a reliable cue and changing the immediate work environment.

Behaviour

Cue

Friction removed

If-then plan

Exception and restart

Evidence

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not promise a habit in 21 or 66 days. Repetition counts are not evidence of capability or business impact. Use the small tracker and bring one example where the behaviour helped and one where an exception was appropriate.

SOURCE / H01, R18, R25 | Original HR Delivery executive activity

PRACTICE LOG | Record whether an opportunity occurred, whether practice was appropriate and whether you attempted it. Counts are not a measure of behaviour quality or business impact. Legitimate exceptions are not failures.

Date	Opportunity?	Appropriate?	Attempted?	Learning / context	Check
					Calculated in the Excel workbook
					Calculated in the Excel workbook
					Calculated in the Excel workbook
					Calculated in the Excel workbook
					Calculated in the Excel workbook
					Calculated in the Excel workbook
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			Calculated in the Excel workbook	
			Calculated in the Excel workbook	
			Calculated in the Excel workbook	
			Calculated in the Excel workbook	
			Calculated in the Excel workbook	
Appropriate opportunities	0			
Attempts in appropriate opportunities	0			
Attempt / opportunity proportion	Calculated in the Excel workbook			

140 / X61 WOOP work experiment

X61 WOOP work experiment

APPLY | 40 minutes | Manual guide 463 / form 464 / example 465

Combine a feasible wish with an anticipated internal obstacle and a concrete if-then response, while retaining attention to external constraints.

Wish

Outcome

Internal obstacle

External barrier

If-then plan

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

WOOP is not a replacement for resources, authority or qualified support. Do not imply that failure means the coachee lacked desire. Use the plan once in the agreed situation, then record the cue, response and consequence.

SOURCE / H01, R18, R19, R20 | Original HR Delivery executive activity

141 / X62 Rolecrafting proposal

X62 Role-crafting proposal

APPLY | 55 minutes | Manual guide 466 / form 467 / example 468

Explore a small, authorised adjustment to tasks or relationships that better uses capability and supports the role's purpose.

Work area

Proposed adjustment

Value

Fairness and capacity

Authorised trial

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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. Discuss the proposal with affected people and run only the agreed trial.

SOURCE / H01, R23 | Original HR Delivery executive activity

142 / X63 Confidence through work evi

X63 Confidence through work evidence

APPLY | 35 minutes setup; two practice opportunities; 30-minute review | Manual guide 469 / form 470 / example 471

Build a more grounded view of readiness by reviewing specific practice and feedback rather than relying on reassurance or a global confidence rating.

Task

Existing evidence

Practice gap

Supported practice

Feedback

Next step

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Confidence is not certification. Do not infer competence for high-risk tasks from self-ratings, coaching participation or a small rehearsal. Record the behaviour, feedback and remaining gap after each practice opportunity.

SOURCE / H01, H04 | Original HR Delivery executive activity

143 / X64 Targeted behavioural feedba

X64 Targeted behavioural feedback pulse

APPLY | 30 minutes design; short collection; 30-minute review | Manual guide 472 / form 473 / example 474

Obtain a small amount of feedback on a named work practice without recreating a 360 test or claiming validated measurement.

Behaviour and window

Participants

Prompts

Illustrative result

Interpretation

Next step

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is an original feedback aid, not a validated instrument. No combined score, norm or employment judgement is appropriate. Ask only the agreed observers and bring the full pattern, including not-observed and unhelpful responses.

SOURCE / H01, H05, R04 | Original HR Delivery executive activity

144 / X65 Prospective decision journa

X65 Prospective decision journal

APPLY | 20 minutes per decision; 45-minute periodic review | Manual guide 475 / form 476 / example 477

Create a record of reasoning before outcomes are known so the executive can learn without rewriting the past through hindsight.

Decision question

Options and criteria

Assumptions

Choice and conditions

Review observation

Learning

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Protect confidential business information and legal privilege. Do not use personal notes to contradict or conceal required official documentation. Make one prospective entry and review it without changing the original wording.

SOURCE / H01, H04 | Original HR Delivery executive activity

145 / X66 Learningpartner checkin

X66 Learning-partner check-in

APPLY | 20 minutes setup; weekly 15-minute check-ins | Manual guide 478 / form 479 / example 480

Create a light, reciprocal support routine for workplace practice without disclosing private coaching content or outsourcing the coach's responsibilities.

Partner

Shared goal

Boundary

Check-in

Next step

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

A learning partner is not a therapist, investigator or substitute for qualified coaching supervision. Do not create an informal reporting channel to the sponsor. Hold one check-in using the four questions and bring any boundary or usefulness concern to the coach.

SOURCE / H01, H04 | Original HR Delivery executive activity

146 / X67 Afteraction review of a dif

X67 After-action review of a difficult conversation

APPLY | 45 minutes | Manual guide 481 / form 482 / example 483

Learn from a real interaction by comparing intent, behaviour, response and consequences, then choosing a proportionate repair or next practice.

Intention

What happened

Helpful behaviour

Unhelpful moment

Repair and next action

Learning

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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. Complete the agreed follow-up and record whether it resolved the specific issue or revealed another dependency.

SOURCE / H01, R15 | Original HR Delivery executive activity

147 / X68 Setback and restart plan

X68 Setback and restart plan

APPLY | 40 minutes | Manual guide 484 / form 485 / example 486

Respond constructively when a practice is interrupted, distinguishing an ordinary lapse from an unsuitable goal or a missing condition.

Stalled practice

Conditions

What still helps

Choice

Restart plan

Review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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. Try the revised small action and report what the conditions allowed, not what you think the coach wants to hear.

SOURCE / H01, R18, R25 | Original HR Delivery executive activity

148 / T61 Coaching dashboard specific

T61 Coaching dashboard specification

ASSURE | 90-120 minute design workshop; specialist sign-off before build | Manual guide 492 / form 493 / example 494

Define useful programme evidence without capturing session content.

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

HOW TO USE THIS RECORD

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.

04 Attach thresholds and fix, adapt, scale, pause or stop responses.

05 Prototype with decision users and remove any metric that changes no decision.

BOUNDARIES AND FOLLOW-THROUGH

The dashboard must never expose individual session content or unsafe small-group results merely because data are available. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

149 / T62 Experience and alliance pul

T62 Experience and alliance pulse

ASSURE | 3-5 minutes; 15-30 minutes for repair if needed | Manual guide 495 / form 496 / example 497

Detect contracting, fit and usefulness issues early.

Choose one response per statement: 1 Strongly disagree; 2 Disagree; 3 Neither; 4 Agree; 5 Strongly agree. N/A = not applicable. Blank = missing. Optional comments stay within the agreed information boundary.

ID	Statement: fixed mixed-order participant version	Response	Optional example / change requested	Check
E05	I retained ownership of decisions and action.			Missing
E02	I could raise what mattered to me.			Missing
E08	I know how to raise a concern or request a rematch.			Missing
E04	The coach helped me see the issue differently.			Missing
E01	I understood the purpose and information boundaries.			Missing

E07	I tested relevant action between sessions.		Missing
E03	The coach and I agreed what useful work involved.		Missing
E06	Coaching connected to meaningful work.		Missing

SOURCE-ORDER VIEW / Linked to the responses above; do not enter a second set

ID	Statement: canonical source order	Response	Linked comment
E01	I understood the purpose and information boundaries.	Calculated in the Excel workbook	Calculated in the Excel workbook
E02	I could raise what mattered to me.	Calculated in the Excel workbook	Calculated in the Excel workbook
E03	The coach and I agreed what useful work involved.	Calculated in the Excel workbook	Calculated in the Excel workbook
E04	The coach helped me see the issue differently.	Calculated in the Excel workbook	Calculated in the Excel workbook
E05	I retained ownership of decisions and action.	Calculated in the Excel workbook	Calculated in the Excel workbook

E06	Coaching connected to meaningful work.	Calculated in the Excel workbook	Calculated in the Excel workbook	
E07	I tested relevant action between sessions.	Calculated in the Excel workbook	Calculated in the Excel workbook	
E08	I know how to raise a concern or request a rematch.	Calculated in the Excel workbook	Calculated in the Excel workbook	

Coverage	Count
Valid ratings	0
Not applicable	0
Missing	8
Invalid	0

INTERPRETATION AND FOLLOW-THROUGH

Discuss individual responses, examples and concerns. Do not calculate an overall psychological score. Missing responses are not negative ratings, and N/A is not zero. A low rating on information boundaries or ability to raise concerns deserves direct attention; a favourable response elsewhere does not cancel it.

For programme reporting, use a separate privacy-approved process and explicit denominators. Example: 9 positive responses among 12 valid responses = 75%; three missing responses remain missing, not negatives. This workbook is one engagement's record, not an anonymous survey platform.

Source H04 T62 contains an inconsistent worked extract. This edition retains the actual eight source statements and stable E01-E08 IDs; the new fictional completed example and analysis rules are clearly identified in the manual. The instrument is developmental, not validated.

150 / T63 Goal progress review

T63 Goal progress review

ASSURE | 30-45 minutes at midpoint and closure | Manual guide 500 / form 501 / example 502

Review progress using evidence and context, not impression alone.

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

HOW TO USE THIS RECORD

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.

04 Examine context, support, unintended effects and credible alternative explanations.

05 Decide sustain, adapt, pause or close and set the next evidence point.

BOUNDARIES AND FOLLOW-THROUGH

Goal progress is not proof of organisational impact or coaching causality and should be interpreted with contextual evidence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

151 / T64 Behavioural evidence interv

T64 Behavioural evidence interview

ASSURE | 30-45 minutes plus coding and quality review | Manual guide 503 / form 504 / example 505

Gather narrow stakeholder evidence with consent.

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

HOW TO USE THIS RECORD

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.

04 Test alternative explanations and seek a negative or contrasting case.

05 Assess sustainability cautiously, code consistently and protect identifying detail.

BOUNDARIES AND FOLLOW-THROUGH

Do not interview without informed consent or use developmental evidence for selection, discipline or diagnosis. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

152 / T65 Contribution analysis

T65 Contribution analysis

ASSURE | 2-4 hours after evidence preparation; independent challenge if high stakes | Manual guide 506 / form 507 / example 508

Judge how plausibly coaching contributed to observed outcomes.

Theory Expected change chain

Observed results Evidence by level

Implementation What was actually delivered

Mechanisms Evidence that intended mechanisms occurred

Alternatives Other explanations

Context Events helping or hindering

Confidence Low/medium/high with reason

Decision Scale, adapt, test or stop

HOW TO USE THIS RECORD

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.

04 Investigate concurrent changes, rival explanations and negative cases.

05 Conclude contribution with confidence, limitations and the decision it informs.

BOUNDARIES AND FOLLOW-THROUGH

Contribution analysis strengthens a reasoned explanation but cannot establish experimental causality or a precise attribution percentage. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

153 / T66 Costconsequence analysis

T66 Cost-consequence analysis

ASSURE | 60-90 minutes after cost and outcome definitions are validated | Manual guide 509 / form 510 / example 511

Compare programme costs with multiple outcomes transparently.

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

HOW TO USE THIS RECORD

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.

04 Describe application and work consequences in their natural units.

05 Compare scenarios without aggregating unlike outcomes or implying causality.

BOUNDARIES AND FOLLOW-THROUGH

Keep unlike consequences visible in their own units; this analysis is not an ROI ratio or licence to double-count value. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

154 / T67 Responsible ROI estimator

T67 Responsible ROI estimator

ASSURE | 90-120 minutes; independent review for public or investment claims | Manual guide 512 / form 513 / example 514

Model a financial range without hiding assumptions.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Use ROI only where outcome quantity and value are credible; never monetise trust, wellbeing or avoided harm speculatively. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04 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.

These contribution and confidence factors are chosen sensitivity assumptions, not estimated causal probabilities. Report how values were constructed, alternative explanations, full costs and non-monetised outcomes. No defensible counterfactual means no causal ROI claim.

Input check	Not entered	Not entered	Not entered

155 / T68 Coach quality scorecard

T68 Coach quality scorecard

ASSURE | 60-90 minutes per coach after evidence review | Manual guide 515 / form 516 / example 517

Review competence, conduct and contribution using multiple evidence sources.

Criterion	Single rating	Evidence	Context / uncertainty	Critical gap	Next action	Rating check	
Ethics and boundaries						Missing	
Contracting						Missing	
Trust and presence						Missing	
Listening						Missing	
Awareness / challenge						Missing	
Choice and action						Missing	
Context / system						Missing	
Inclusion / access						Missing	
Transfer						Missing	
Reflection / supervision						Missing	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

A periodic scorecard does not replace immediate complaint, incident, competence or safeguarding action when a gate fails. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

Workbook representation uses one rating cell per row instead of the source's multiple response columns. Record observed evidence and critical concerns. Do not average these ratings into accreditation or a pass decision. N/O = not observed.

156 / T69 Supervision record

T69 Supervision record

ASSURE | 30-60 minutes monthly; rapid consultation for material dilemmas | Manual guide 518 / form 519 / example 520

Structure reflective supervision without unnecessary identifying detail.

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	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

The supervision record is not the participant case file and should contain no unnecessary identifying or session detail. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

157 / T70 Ethical decision record

T70 Ethical decision record

ASSURE | 30-60 minutes; immediate consultation where urgency requires | Manual guide 521 / form 522 / example 523

Make a transparent, proportionate decision in a dilemma.

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	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This record structures ethical reasoning but does not provide legal, clinical, safeguarding or regulatory determination. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

158 / T71 Incident and complaint path

T71 Incident and complaint pathway

ASSURE | Immediate protection; triage within SLA; duration stated case by case | Manual guide 524 / form 525 / example 526

Respond fairly, promptly and without retaliation.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not use the routine complaint pathway for emergencies; activate the named urgent or statutory route immediately. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

159 / T72 AI coaching assurance check

T72 AI coaching assurance checklist

ASSURE | Half-day review plus scenario testing; repeat after material change | Manual guide 527 / form 528 / example 529

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

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	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Checklist completion is not proof that an AI service is safe, effective or suitable for every user or context. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

160 / T73 Quarterly portfolio review

T73 Quarterly portfolio review

ASSURE | 90-120 minutes quarterly after protected pack review | Manual guide 530 / form 531 / example 532

Turn evidence into scale, adapt and stop decisions.

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

The board should receive protected aggregate evidence and must not seek private content to explain a programme trend. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

161 / T74 Maturity assessment

T74 Maturity assessment

ASSURE | Half to one day annually; targeted re-rating after 90 days | Manual guide 533 / form 534 / example 535

Assess organisational coaching capability against four evidence-gated levels.

Dimension	Level 1-4 or N/O	Evidence / confidence	Critical gap / exception	90-day action / owner	Rating check	
Strategic purpose					Missing	
Leadership sponsorship					Missing	
Portfolio design					Missing	
Access and inclusion					Missing	
Contracting					Missing	
Coach capability					Missing	
Matching					Missing	
Supervision					Missing	
Manager ecosystem					Missing	
Application					Missing	
Measurement					Missing	
Data and privacy					Missing	

AI and technology		Missing	
Ethics and complaints		Missing	
Supplier management		Missing	
Continuous improvement		Missing	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

This is an internal improvement assessment, not accreditation, validation or a benchmark against unnamed organisations. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04 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.

Source-specific levels: 1 Ad hoc; 2 Defined; 3 Integrated; 4 Adaptive. N/O = insufficient observation. There is no overall maturity percentage. A critical ethical gap requires action irrespective of other ratings.

Dimensions with numeric ratings	0

Not observed	0			
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.
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.
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.

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.

162 / T77 Coach selection and observe

T77 Coach selection and observed-practice rubric

ASSURE | 75-120 minutes per candidate plus calibration | Manual guide 540 / form 541 / example 542

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

Criterion	Single rating	Evidence	Context / uncertainty	Critical gap	Next action	Rating check	
Ethics and boundaries						Missing	
Contracting						Missing	
Trust and presence						Missing	
Listening						Missing	
Awareness / challenge						Missing	
Choice and action						Missing	
Context / system						Missing	
Inclusion / access						Missing	
Transfer						Missing	
Reflection / supervision						Missing	

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Selection scores cannot override a mandatory gate, unresolved conflict or missing evidence of authorised competence. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

Workbook representation uses one rating cell per row instead of the source's multiple response columns. Record observed evidence and critical concerns. Do not average these ratings into accreditation or a pass decision. N/O = not observed.

163 / T79 Supervision standard and ca

T79 Supervision standard and cadence

ASSURE | 90-minute design review; reassess after incident or scope change | Manual guide 543 / form 544 / example 545

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Published cadence is a minimum; emerging risk, novice practice or complex cases may require more or different supervision. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

164 / T80 Coach authorisation CPD and

T80 Coach authorisation, CPD and caseload record

ASSURE | 15-20 minutes quarterly; 45-60 minutes for reauthorisation | Manual guide 546 / form 547 / example 548

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

An up-to-date register supports control but is not, by itself, evidence that current practice remains competent. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

165 / T85 Evaluation design and datac

T85 Evaluation design and data-collection matrix

ASSURE | Half-day design; specialist review for experimental or linked data | Manual guide 549 / form 550 / example 551

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not design evaluation after delivery begins if baseline, consent or comparison evidence is essential to the decision. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

166 / T86 Aggregate themes and organi

T86 Aggregate themes and organisational action log

ASSURE | 60-90 minutes quarterly after protected theme preparation | Manual guide 552 / form 553 / example 554

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

Protected theme	Evidence / confidence	Aggregation / risk	System implication	Action	Owner / due	Feedbac k / review

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Aggregate themes must never be reverse-engineered for individual employment action or disclosed below the protection threshold. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

167 / T87 Qualityassurance sampling p

T87 Quality-assurance sampling plan

ASSURE | 90-minute planning; sampling effort proportionate to risk | Manual guide 555 / form 556 / example 557

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Periodic sampling cannot replace continuous concern routes, incident response or mandatory review of every critical exception. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

168 / T88 Supplierplatform continuity

T88 Supplier/platform continuity and exit plan

ASSURE | 2-3 hour plan; annual exercise and post-change retest | Manual guide 558 / form 559 / example 560

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

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

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

A continuity plan is ineffective without enforceable data rights, offline contacts, tested alternatives and named invocation authority. Use the record for its named decision; agree the owner, next action and review point. Keep private engagement content separate from programme reporting.

SOURCE / H01, H04 | H04

169 / X69 Anchored goalattainment rev

X69 Anchored goal-attainment review

ASSURE | 60 minutes | Manual guide 561 / form 562 / example 563

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

Goal

Predefined expected level

Evidence

Attainment

Contribution and limits

Next decision

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

These are individual developmental anchors, not clinical GAS norms or a psychometric T-score. Do not average unlike goals into a competence verdict. Assemble the agreed evidence and mark what is missing before the review rather than selecting a favourable rating first.

SOURCE / H01, H04, R26 | Original HR Delivery executive activity

170 / X70 Learning and contribution s

X70 Learning and contribution story

ASSURE | 60 minutes | Manual guide 564 / form 565 / example 566

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

Original hypothesis

Application evidence

Observed consequence

Other influences

Limits and adverse effects

Conclusion and decision

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Do not monetise confidence or assign an invented percentage of business improvement to coaching. Use transparent assumptions only in clearly labelled sensitivity scenarios. Draft a one-page account with evidence, alternative explanations, limits and the next decision; approve what may be shared.

SOURCE / H01, H03, H04, R06, R07 | Original HR Delivery executive activity

171 / X71 Sixmonth maintenance and se

X71 Six-month maintenance and self-coaching plan

ASSURE | 50 minutes | Manual guide 567 / form 568 / example 569

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

Practice one

Practice two

Drift signals

Self-review rhythm

Support and escalation

Six-month decision

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

Maintenance is not a promise that difficulties will not return. Avoid dependency and do not replace appropriate specialist support with self-coaching. Put the first review in your own calendar and prepare a brief prompt you can use without the coach.

SOURCE / H01, H04 | Original HR Delivery executive activity

172 / X72 Closure conversation and fu

X72 Closure conversation and future letter

ASSURE | 60 minutes; 20-minute optional letter | Manual guide 570 / form 571 / example 572

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

Learning

Applied practice

Unfinished work

Closure terms

Future letter

Permitted summary

HOW TO USE THIS RECORD

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.

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.

BOUNDARIES AND FOLLOW-THROUGH

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

SOURCE / H01, H04, R01 | Original HR Delivery executive activity

173 / EX Executive Journey

Fictional executive journey

NEW TEACHING EPISODES around M-07 / Meridian Infrastructure Group. Not client records.

X01 Executive role mandate | Align

Purpose of the role	M-07 must make capital-gate decisions dependable across MetroLink East, without taking technical approval away from the accountable specialists.
Accountable outcomes	A usable decision at each gate; unresolved evidence and conditions explicitly recorded. Delivery speed alone is insufficient.
Decisions and boundaries	M-07 owns the integrated recommendation. Engineering retains technical sign-off and the sponsor approves material scope changes.
Expected leadership moments	At the monthly review, invite competing evidence before stating a preferred recommendation.
Unconfirmed expectations	The sponsor appears to expect same-day approval. M-07 will check whether this applies when a mandatory assurance is missing.
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.

X10 Negotiate a shared coaching goal | Agree

Sponsor interest	Fewer reopened gate decisions and more dependable cross-functional ownership.
Coachee interest	Lead difficult decisions without repeatedly taking over specialists' work.
Shared behavioural goal	At the next two gate reviews, use a clear decision question, invite concerns first and confirm the owner and conditions.
Support required	Sponsor clarifies scope authority; engineering lead provides timely evidence and feedback on the trial.
Information agreement	M-07 shares agreed actions and observed work evidence; no private notes, raw assessment scores or inferred motives are shared.
Review	After two gate meetings, coachee and sponsor discuss usefulness and conditions, then decide whether to retain or revise the goal.

X23 Leadership 360 debrief | Assess

Report boundary	Authorised Leadership 360 Feedback; self and manager separate, peer and direct-report groups protected according to the manual.
Initial response	M-07 recognises strong decision ownership but is surprised by comments about limited challenge.
Evidence pattern	Some colleagues experience the recommendation as settled before discussion; observation opportunities differ.
Context and counterexample	A recent concerns-first meeting was experienced differently, suggesting the sequence may matter.
Experiment	At two reviews, ask for risks and alternatives before stating a preference, then summarise what changed in the recommendation.
Follow-up and sharing	M-07 shares the practice, not rater identities or raw group data, and requests specific feedback after two meetings.

X46 Difficult conversation rehearsal | Activate

Conversation	M-07 needs to discuss repeated late evidence with a commercial peer.
Opening	The last two cost updates arrived after the preparation deadline, which limited the review. What is getting in the way?
Likely response	The peer says the deadline ignores supplier response times.
Listening response	You are saying the current deadline is not controllable because a supplier input arrives later. Which part can we change together?
Boundary and agreement	Mandatory cost assumptions must be visible before endorsement; agree an early provisional update and a named exception route.
Follow-up	Review the next cycle and adjust the process if the supplier dependency remains.

X55 Fourteen-day delegation experiment | Apply

Task and permission	A specialist agrees to prepare the next integrated recommendation within their authorised scope.
Agreement	Outcome, evidence standard, available data, two-day checkpoint and escalation conditions are written and understood.
Prediction	Clearer checkpoints will reduce avoidable rewriting while keeping material gaps visible.
Observed practice	M-07 asks for the specialist's options before offering an opinion; one late supplier input is escalated appropriately.

Result and limits	Ownership remains clearer, but the supplier delay persists; the trial does not prove that delegation alone improves delivery time.
Next decision	Retain the agreement format and address the supplier dependency through procurement.

X69 Anchored goal-attainment review | Assure

Goal	Use clear decision framing and invite challenge in two gate reviews.
Predefined expected level	At both reviews, state the question, hear decision-relevant concerns and close with owner and conditions.
Evidence	Two records and consented feedback show the sequence was used; one concern changed an approval condition.
Attainment	Expected level achieved for this bounded goal; no overall leadership score is inferred.
Contribution and limits	Rehearsal helped M-07's response, while earlier evidence and sponsor clarification also mattered.
Next decision	Retain the routine and review its usefulness after three further opportunities, without repeating the full assessment battery.

The examples show decision framing, agreement, feedback, rehearsal, workplace application and review. Operational dependencies remain real constraints. Do not turn the case into a causal success story.

174 / EX Calculations

Worked calculations and checks

Fictional numerical examples. Separate examples need not describe the same programme or coachee.

EXAMPLE A / Responsible ROI sensitivity. GBP values are invented educational assumptions. Contribution and confidence factors are subjective scenario weights, not causal probabilities.

Component	Low	Base	High	Interpretation
Gross value, GBP	42000	42000	42000	Six events x GBP 7,000; source H04's illustrative gross value.
Contribution proportion	0.15	0.3	0.5	Judgemental sensitivity assumption, not measured attribution.
Confidence adjustment	0.5	0.65	0.8	Judgemental evidence discount, not a probability.
Adjusted scenario benefit	3150	8190	16800	Gross x contribution x confidence.
Full cost, GBP	8150	8150	8150	Illustrative full cost; replace with defensible local costs.
Net scenario benefit	-5000	40	8650	Adjusted benefit less full cost.

Scenario ROI	-0.6134969325153374	0.0049079754601227	1.0613496932515338	Net divided by cost; undefined for zero cost.

EXAMPLE B / Separate programme planning illustration: 80 eligible people, 25% interest and 80% starts among those interested. It is not the source Meridian programme or M-07's case.

Planning input / calculation	Example
Eligible people	80
Interest proportion	0.25
Start proportion	0.8
Expected starts	16
Planned whole starts	16
Sessions per start	6
Session minutes	60
Preparation minutes / session	30
Administration hours / start	1
Delivery hours needed	160
Coaches	4
Hours per coach	50

Usable capacity proportion	0.8
Available hours	160
Capacity gap	0
Hourly cost GBP	250
Fixed cost GBP	5000
Total cost GBP	45000
Cost per planned start GBP	2812.5

FUNCTIONAL CHECKS | These checks were run against the live model cells, including missing inputs, zero values, invalid categories, gates and linked dashboards. All test inputs were removed from live sheets after checking.

Check	Expected	Actual	Result
T67 base benefit	8190.0	8190	PASS
T67 base net	40.0	40	PASS
T67 base ROI	0.0049079754601227	0.0049079754601227	PASS
T67 zero gross benefit	0.0	0	PASS
T67 zero gross net	-8150.0	-8150	PASS
T67 zero gross ROI	-1.0	-1	PASS
T67 zero cost benefit	8190.0	8190	PASS
T67 zero cost net	8190.0	8190	PASS

T67 zero cost ROI			PASS
T67 invalid contribution benefit			PASS
T67 invalid contribution net			PASS
T67 invalid contribution ROI			PASS
T67 negative cost benefit			PASS
T67 negative cost net			PASS
T67 negative cost ROI			PASS
T67 missing confidence benefit			PASS
T67 missing confidence net			PASS
T67 missing confidence ROI			PASS
T12 blank	Not assessed	Not assessed	PASS
T12 pass	Evidence check passed; human decision required	Evidence check passed; human decision required	PASS
T12 critical fail	HOLD - failed condition	HOLD - failed condition	PASS

T12 conditional	CONDITIONAL - review actions	CONDITIONAL - review actions	PASS
T12 missing	INCOMPLETE / invalid status	INCOMPLETE / invalid status	PASS
T12 invalid	INCOMPLETE / invalid status	INCOMPLETE / invalid status	PASS
T62 blank	[0, 0, 8, 0]	[0, 0, 8, 0]	PASS
T62 all valid	[8, 0, 0, 0]	[8, 0, 0, 0]	PASS
T62 N/A and missing	[6, 1, 1, 0]	[6, 1, 1, 0]	PASS
T62 invalid	[2, 1, 1, 4]	[2, 1, 1, 4]	PASS
T62 E01 stable-ID lookup	1	1	PASS
T10 valid	12	12	PASS
T10 lower invalid			PASS
T10 fraction invalid			PASS
T10 missing			PASS
T62 zero invalid flag	INVALID response	INVALID response	PASS
T10 text guarded			PASS
T81 complete weighted score	3	3	PASS

T81 text suppresses score			PASS
T74 valid coverage only	1	1	PASS
T74 invalid rating	INVALID rating	INVALID rating	PASS
T84 base row 64	16	16	PASS
T84 base row 65	16	16	PASS
T84 base row 70	160	160	PASS
T84 base row 74	160	160	PASS
T84 base row 75	0	0	PASS
T84 base row 78	45000	45000	PASS
T84 base row 79	2812.5	2812.5	PASS
T84 zero starts	0	0	PASS
T84 zero demand	0	0	PASS
T84 no divide by zero			PASS
T84 invalid fraction			PASS
T08 weighted score	3	3	PASS
T08 zero weight			PASS
X35 weighted score	3	3	PASS

X35 weights not 100			PASS
Actions overdue days	5	5	PASS
Dashboard overdue linked	1	1	PASS
Actions complete no overdue	0	0	PASS
Actions missing completion date	Add valid completion date	Add valid completion date	PASS
Actions missing due not zero			PASS
Live dashboard restored	[0, 0, 0, 0, 0, 0, 0, 0, 0, 0]	[0, 0, 0, 0, 0, 0, 0, 0, 0, 0]	PASS

175 / EX Charts

Read charts with their limits

Illustrative charts of practice, time use and scenarios. These data do not populate the live dashboard.

These independent teaching datasets are not norms, recommended time allocations or actual results. Values demonstrate interpretation, and the charts use their own EX data only.

Work category	Before hours	After hours
Decision meetings	20	18
Strategic preparation	2	4
Developing people	2	4
Stakeholder work	5	5
Administration / other	11	9

Week	Appropriate opportunities	Attempts
1	2	0
2	2	1
3	2	1
4	2	2
5	2	1
6	2	2

7	2	2
8	2	2

Practice counts identify follow-through opportunities. An attempt may be helpful, unhelpful or inconclusive. The line does not establish improved leadership or business impact.

Pulse item	Example response
E01	4
E02	4
E03	3
E04	4
E05	5
E06	4
E07	3
E08	4

Experience statements use the source 1-5 response options. Review items separately. A chart of self-reported experience is not a validated overall alliance scale.

Scenario	Net scenario benefit GBP
Low	-5000
Base	40
High	8650

Capacity measure	Hours
Delivery demand	160
Available capacity	160
Illustrative cost component	GBP
Coach time	3000
Coachee time	2500
Operations	1000
Supervision	900
Evaluation	750
Total illustrative cost	8150

New illustrative breakdown of a GBP 8,150 full cost, not source client accounts or recommended fees. Include opportunity cost, supervision, operations and evaluation; replace all values with authorised local evidence.

176 / 12 Visual Index

12 Visual Index

Visual worksheets and plotters

VISUAL INDEX: tab 12 Visual Index

Visual sheet	Activity	Manual guide	Worksheet	What it shows	Open
V01 Context Wheel	X29	284	285	Optional six-spoke context plot	Open named tab
V02 Leadership Lifeline	X15	242	243	Events and locally described impact	Open named tab
V03 Priorities Plot	X04	95	96	Contribution against effort	Open named tab
V04 Time and Sprint	X20 / X57	257	258	Booked/used time and sprint coverage	Open named tab

V05 Decision Matrix	X35	350	351	Weighted options, with mandatory gates	Open named tab
V06 Feedback Counts	X64	472	473	Observed / not exposed / missing counts	Open named tab
V07 Goal Anchors	X69	561	562	Five anchored levels for one goal	Open named tab

Presentation edition: the original tool IDs, manuals, assessments and working records are retained. These added sheets supply live plotting and comparison spaces, not new psychometric tests or automatic coaching decisions.

PRIVACY: one engagement per workbook. The visual inputs can be sensitive. Share only a separate agreed sponsor summary; hidden worksheets and sheet protection are not confidentiality controls.

BLANK IS NOT ZERO: leave an unobserved or unknown value blank. Read each sheet's coverage checks and source labels. Numerical plotting conventions are locally defined discussion aids, not norms, capability scores or ideal targets.

177 / V01 Context Wheel

V01 Context Wheel

X29 / Leadership context wheel

VISUAL INDEX: tab 12 Visual Index

Condition	Your position	Plot boundary	Evidence / context
Mandate		10	
Relationships		10	
Resources		10	
Capability		10	
Feedback		10	
Opportunity		10	
INNER ENDPOINT (0)			
OUTER ENDPOINT (10)			
No positions entered			

Do not calculate an overall score or compare people. A missing condition remains missing; a different rating may reflect changed understanding. The six conditions are the six spokes specified in the retained X29 guide.

Use the PDF worksheet for drawing, annotation and the priority action. Enter numeric values here only when they improve the coaching conversation. Do not populate this sheet from a personality or readiness assessment without an appropriate, distinct rationale.

178 / V02 Leadership Lifeline

V02 Leadership Lifeline

X15 / Leadership lifeline

VISUAL INDEX: tab 12 Visual Index

Order	Event / date	Optional position	What happened	Lesson formed	Counterexample
1					
2					
3					
4					
5					
6					
LOWER ENDPOINT / MEANING					
UPPER ENDPOINT / MEANING					

The chart joins events in the order shown; it does not make a causal or clinical claim. Record the event separately from the meaning attached to it. Use the same endpoints for any later comparison.

Event order	Position

	1	Calculated in the Excel workbook
	2	Calculated in the Excel workbook
	3	Calculated in the Excel workbook
	4	Calculated in the Excel workbook
	5	Calculated in the Excel workbook
	6	Calculated in the Excel workbook

179 / V03 Priorities Plot

V03 Priorities Plot

X04 / Contribution and effort plotter

VISUAL INDEX: tab 12 Visual Index

Theme	Effort / displacement	Contribution now	Evidence	Dependencies	Choice / not-now

Define both axes before plotting. Inspect the plotted axis labels when comparing versions; Excel can auto-scale the view. A high-contribution option can still be infeasible or outside the coachee's authority.

No plotting values entered

Use the matching PDF quadrant to label each point with the theme name or number. The matrix supports a conversation about priorities; it does not compute an automatic priority score.

180 / V04 Time and Sprint

V04 Time and Sprint

X20 / X57 / Planned versus used

VISUAL INDEX: tab 12 Visual Index

Period / basis	Booked hours	Hours used as intended
Enter both hour quantities		

Measure	Hours	Basis
Booked	Calculated in the Excel workbook	
Used as intended	Calculated in the Excel workbook	

Sprint block	Date / purpose	Planned minutes	Used?
Block 1			
Block 2			
Block 3			

Block 4

Recorded status	Blocks
Used	0
Not used	0

No block statuses recorded

Unknown status is not No. The source example uses three of four blocks (75%); the live calculation reports the number actually recorded. A completed block is not proof of a useful outcome.

181 / V05 Decision Matrix

V05 Decision Matrix

X35 / Weighted options and gates

VISUAL INDEX: tab 12 Visual Index

Criterion	Weight	Option A	Option B	Option C
WEIGHT TOTAL	0			
All mandatory conditions met?				
Eligible weighted score		Calculated in the Excel workbook	Calculated in the Excel workbook	Calculated in the Excel workbook

Option	Eligible score
Option A	Calculated in the Excel workbook
Option B	Calculated in the Excel workbook

Option C	Calculated in the Excel workbook

A blank score means incomplete or ineligible, not zero. Record the reason for every rating. Change weights openly and examine whether the decision changes; do not manipulate the matrix to justify a preferred answer.

This is a decision aid, not a validated assessment or proof that the highest-scoring option is right. The accountable person still decides, with the coachee's purpose, constraints, uncertainty and safeguards in view.

182 / V06 Feedback Counts

V06 Feedback Counts

X64 / Observation coverage

VISUAL INDEX: tab 12 Visual Index

Response category	Count	Context / basis
Observed the practice		
No relevant exposure		
No response / missing		
Recorded population	Calculated in the Excel workbook	

Enter all three counts, including explicit zeros

If the source example is entered, use 3 observed, 1 with no relevant exposure and 0 missing. Separately record that two found the question clearer and one wanted more preparation time. Do not change the denominator to manufacture a favourable result.

A small, convenience-selected group cannot establish general leadership improvement. Keep named/anonymous reporting arrangements accurate and retain the authorised handling of quotations.

183 / V07 Goal Anchors

V07 Goal Anchors

X69 / One goal, five anchored levels

VISUAL INDEX: tab 12 Visual Index

-2 Much less	-1 Some what less	0 Expected	+1 Some what more	+2 Much more		Goal		Review date		Selected level	

Record insufficient evidence explicitly rather than inventing a rating. Keep changes in role, opportunity or criteria separate.

EVIDENCE AND ALTERNATIVE EXPLANATIONS

The expected level must not be rewritten afterwards to make progress look better. Different goals need their own descriptions and evidence; there is no overall average.

Close with a decision: retain, revise, extend or close this goal. Keep the participant's evidence, the sponsor's permitted information and the coach's private notes distinct.