HR DELIVERY / STEP-BY-STEP SERIES

Executive Coaching

G1

PORTAL USER GUIDE

Learn to use the coaching library, navigate the 6A framework, select questions and activities, prepare useful records and arrange coaching that connects reflection with workplace action.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

A working guide to purposeful coaching

Use the portal to find the framework, questions, activities and working documents that support a coaching engagement. Begin with your purpose and choose the resource that helps the next conversation.

This manual distinguishes the public reading library, portal download demonstration, human coaching arrangements and the current AI coaching preview. The resource and 6A navigation were inspected directly; protected session-calendar controls were not accessed.

WHAT YOU CAN DO

01 Find and read coaching resources

02 Navigate the six 6A responsibilities

03 Choose questions and activities thoughtfully

04 Prepare agreements and working records

05 Connect assessment or learning with coaching

06 Arrange support and check the current online service

WHO THIS GUIDE IS FOR

Coachees and executives • Qualified coaches and programme owners • Managers supporting development • Team-development sponsors

CONTENTS

In this guide

Use the chapter pages to find a task. Follow each numbered sequence and check the result before continuing.

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FOREWORD

A note from Dr Phillip

Good coaching gives a person space to think, ownership of the next step and a practical way to learn from it.

Coaching creates space to think carefully about the work in front of you. It is most useful when the conversation has a worthwhile purpose, the relationship has clear boundaries and the person leaves with a practical choice they own. A library of tools supports that work, but does not replace the quality of the conversation.

The HR Delivery 6A framework connects purpose, agreement, understanding, choice, practice and review. You may return to an earlier stage when the evidence or circumstances change. This guide shows how to find the relevant framework material, choose a question or activity, and use working documents that make the relationship and progress clear.

Start with one live challenge and use the resources proportionately. Read the guidance before using an exercise, agree what will remain confidential and distinguish a useful experiment from a promise of a particular outcome. Review what changes at work, not only what was discussed in a session. Lama can help you arrange the appropriate human coaching or specialist support.

DR PHILLIP

HR Delivery

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

OPEN SOURCE

Meet Lama

Lama is the first point of contact for arranging coaching or finding the right resource route. Tell her whether the request is for individual, team, assessment-linked or programme-linked support. Explain your goal, preferred language and working arrangements without sending sensitive session notes. She can help clarify the enquiry, arrange a discussion with the appropriate coaching service and confirm access, availability and the status of the online coaching experience.

ASK LAMA TO HELP WITH

- Human coaching arrangements
- Coaching portal and resource access
- Assessment or programme-linked pathways
- Current Sami service availability

HAVE THESE DETAILS READY

- Your role, team or programme context
- A concise development goal
- Preferred language, format and location
- Relevant assessment or programme name

OPEN LAMA'S RECEPTION

hr.delivery

SIGNING IN / STEPS 1–3 OF 4

OPEN SOURCE

Signing in

01 Open the Coaching Department Portal

Use the portal directory's coaching link. Confirm the page says "Space to think. Confidence to act."

CHECK The Portal ID and Password fields are visible.

02 Enter your issued access details

Complete 'Portal ID' and 'Password' using the details provided for your organisation. Keep passwords out of shared notes and screenshots.

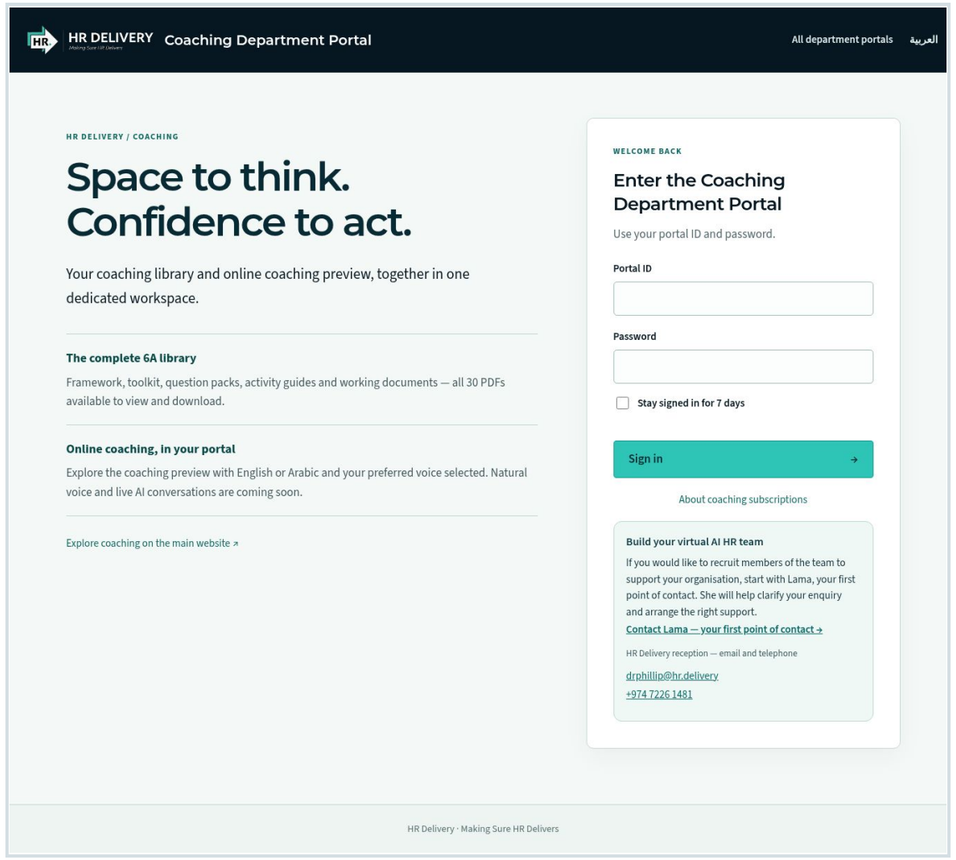
CHECK The form is ready for the sign-in action.

03 Choose the sign-in duration

Use 'Stay signed in for 7 days' only when appropriate for a device you control.

CHECK The retained-access preference reflects your circumstances.

CURRENT LIVE SCREEN



Current Coaching Department Portal sign-in screen and public service-status wording.

SIGNING IN / STEPS 4–4 OF 4

OPEN SOURCE

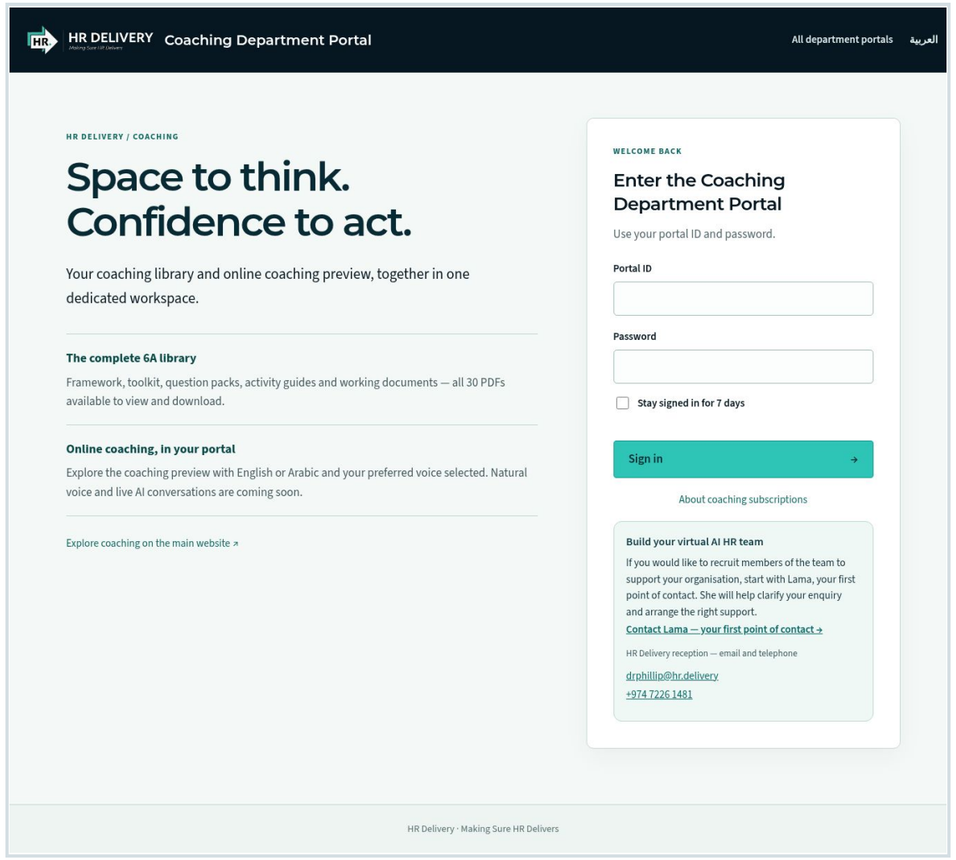
Signing in

04 Sign in and check the workspace

Select 'Sign in'. If access fails, ask Lama to check the issued access rather than repeatedly retrying.

CHECK Successful entry should expose the coaching workspace; this result was not tested.

CURRENT LIVE SCREEN



Current Coaching Department Portal sign-in screen and public service-status wording.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 Use the portal access issued for your organisation. Different workspaces and roles can expose different options.

02 A participant invitation or public document link is separate from administrator access.

03 The public library provides view-only reading. The portal demonstration shows separate View PDF and Download PDF controls.

04 Online coaching is a preview in the reviewed screens. Human coaching is arranged through HR Delivery; an appointment request is not a confirmed session.

The sign-in screen was inspected. Protected workflows were not entered during this review because the browser required secure authentication. Published demonstration screens and source-described procedures are identified throughout.

YOUR WORKFLOW MAP

How the tasks connect

Follow the sequence for a complete piece of work, or go straight to the chapter you need.

01

Find and use the coaching library

PAGE 010

02

Work through the 6A framework

PAGE 023

03

Arrange the right coaching pathway

PAGE 032

04

Explore Sami and check availability

PAGE 049

Each task: prepare the inputs, follow the numbered steps, then confirm the output and the checks.

01

Find and use the coaching library

Choose the right type of resource and use the document reader.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

FIND AND USE THE COACHING LIBRARY / G-01-01

OPEN SOURCE

Find, view and download a resource

Select an appropriate coaching document and obtain the permitted format.

WHO USES THIS Coach, coachee or programme owner

BEFORE YOU BEGIN

- Portal access for downloads
- A purpose or stage of coaching to support

WHAT YOU WILL HAVE

- Selected coaching document
- Portal PDF copy where permitted

CHECK BEFORE YOU FINISH

- Public reading access does not imply editable or downloadable access.
- Confirm the title and edition before using a record or exercise.

The public page has no Download PDF control.

The public collection is view-only. Use the authorised coaching portal for downloadable copies or ask Lama to confirm access.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public reading and reader controls were inspected; portal download controls are shown in an official demonstration.

FIND AND USE THE COACHING LIBRARY / STEPS 1–2 OF 5

OPEN SOURCE

Find, view and download a resource

01 Choose the resource collection

The library demonstration shows 'The 6A framework', 'Question packs', 'Activity deep dives' and 'Working documents'. Start with the collection that matches your task.

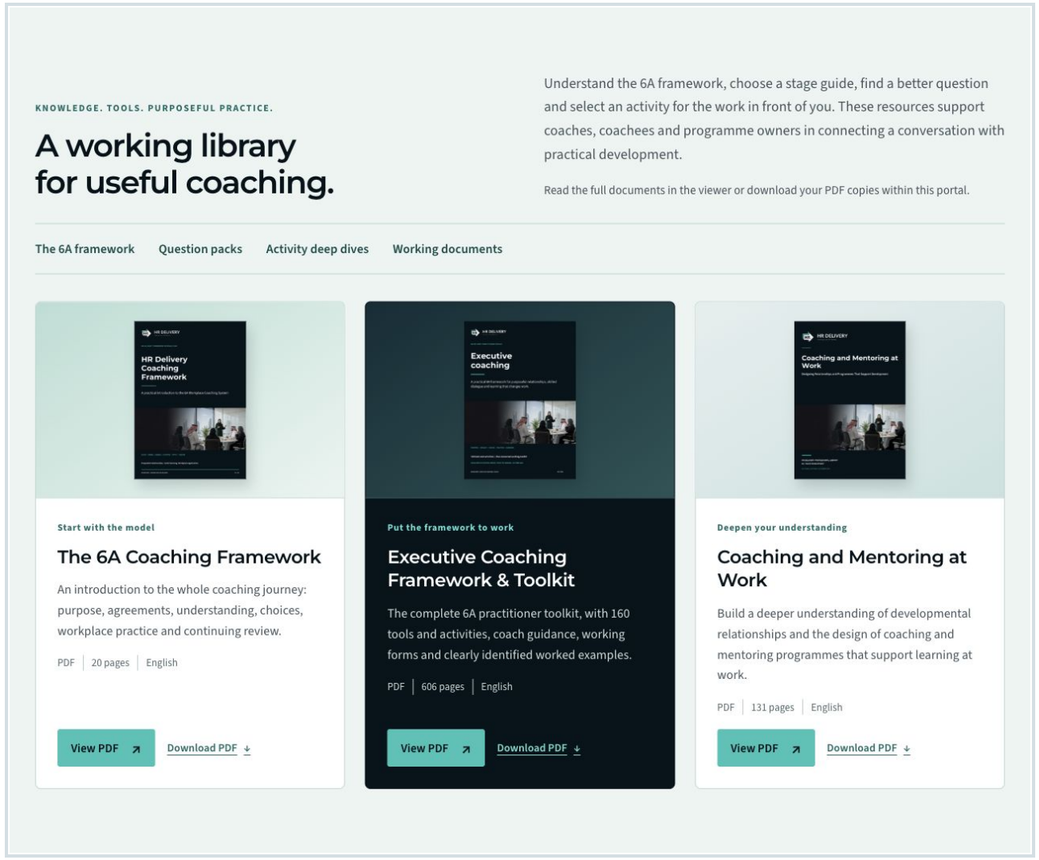
CHECK The available resources are narrowed by their practical purpose.

02 Read the card before opening

Check the title, description, language and page count. For orientation choose the framework; for practitioner detail choose the toolkit; for wider context choose Coaching and Mentoring at Work.

CHECK The selected resource matches the depth of guidance you need.

PUBLISHED DEMONSTRATION



Official portal-library demonstration showing collection links and separate View PDF / Download PDF controls.

FIND AND USE THE COACHING LIBRARY / STEPS 3–4 OF 5

OPEN SOURCE

Find, view and download a resource

03 Open the document

Choose 'View PDF'. Check the reader title and page count to confirm you opened the intended document.

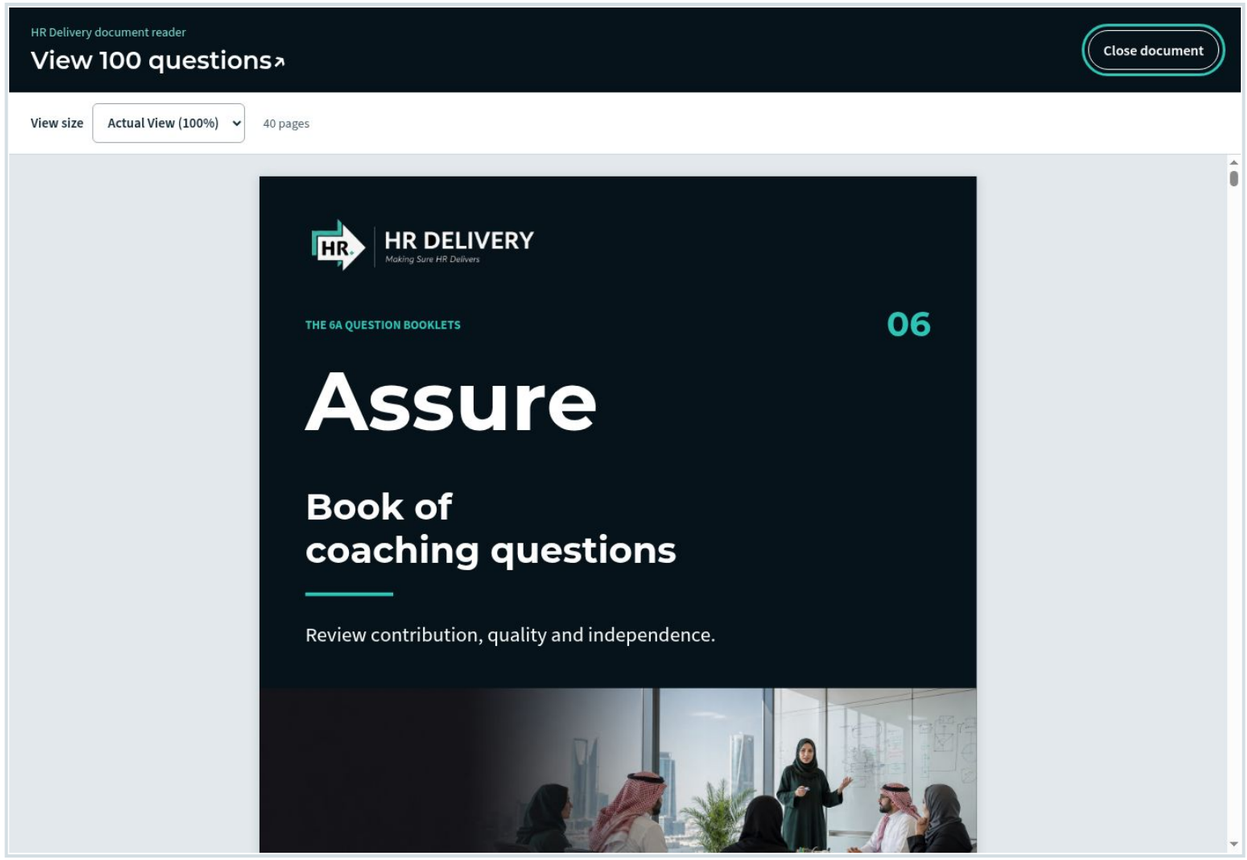
CHECK The document opens in the HR Delivery reader.

04 Read at a suitable size

Use 'View size' to choose 'Actual View (100%)' or 'Full Width View'. Scroll through the document and use its contents links where available.

CHECK The material is readable and the relevant section is reachable.

CURRENT LIVE SCREEN



Current public document reader for the Assure 100-question booklet; 40-page count and view-size control are visible.

FIND AND USE THE COACHING LIBRARY / STEPS 5–5 OF 5

OPEN SOURCE

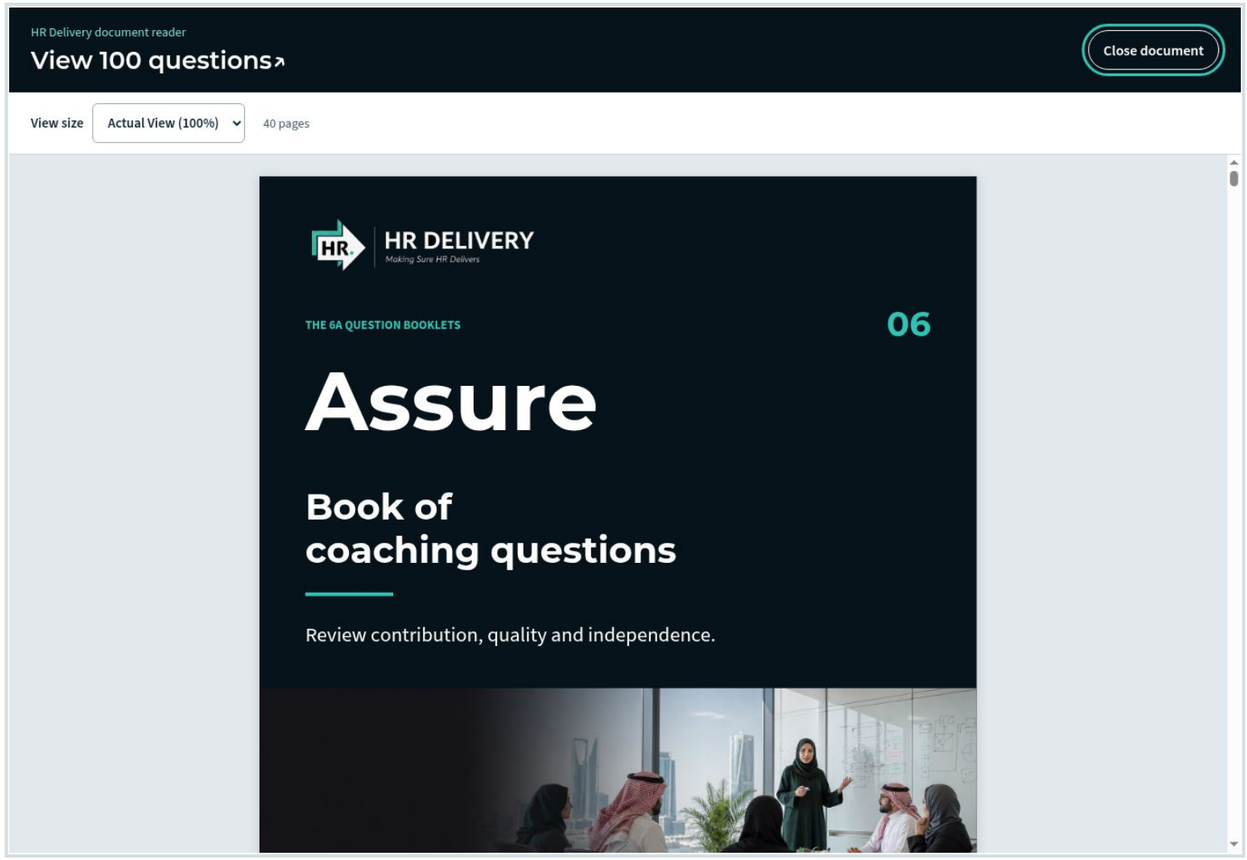
Find, view and download a resource

05 Return or retain a permitted copy

Use 'Close document' to return. Inside the portal, the demonstration shows 'Download PDF' separately; open the downloaded file to verify it.

CHECK You return to the library or retain a complete authorised copy.

CURRENT LIVE SCREEN



Current public document reader for the Assure 100-question booklet; 40-page count and view-size control are visible.

FIND AND USE THE COACHING LIBRARY / G-01-02

OPEN SOURCE

Choose a question pack and use it thoughtfully

Find questions suited to the purpose of the next conversation.

WHO USES THIS Coach or reflective practitioner

BEFORE YOU BEGIN

- An agreed coaching purpose
- The relevant 6A stage

WHAT YOU WILL HAVE

- Selected question set
- Reflection and next-step notes

CHECK BEFORE YOU FINISH

- Do not interpret the number of questions as a required session script.
- Read the question’s guidance before use.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

FIND AND USE THE COACHING LIBRARY / STEPS 1–2 OF 5

OPEN SOURCE

Choose a question pack and use it thoughtfully

01 Open the relevant stage or question library

Use 'Question packs' or select a 6A stage. Each stage offers 'View 100 questions'; the complete collection covers all six stages.

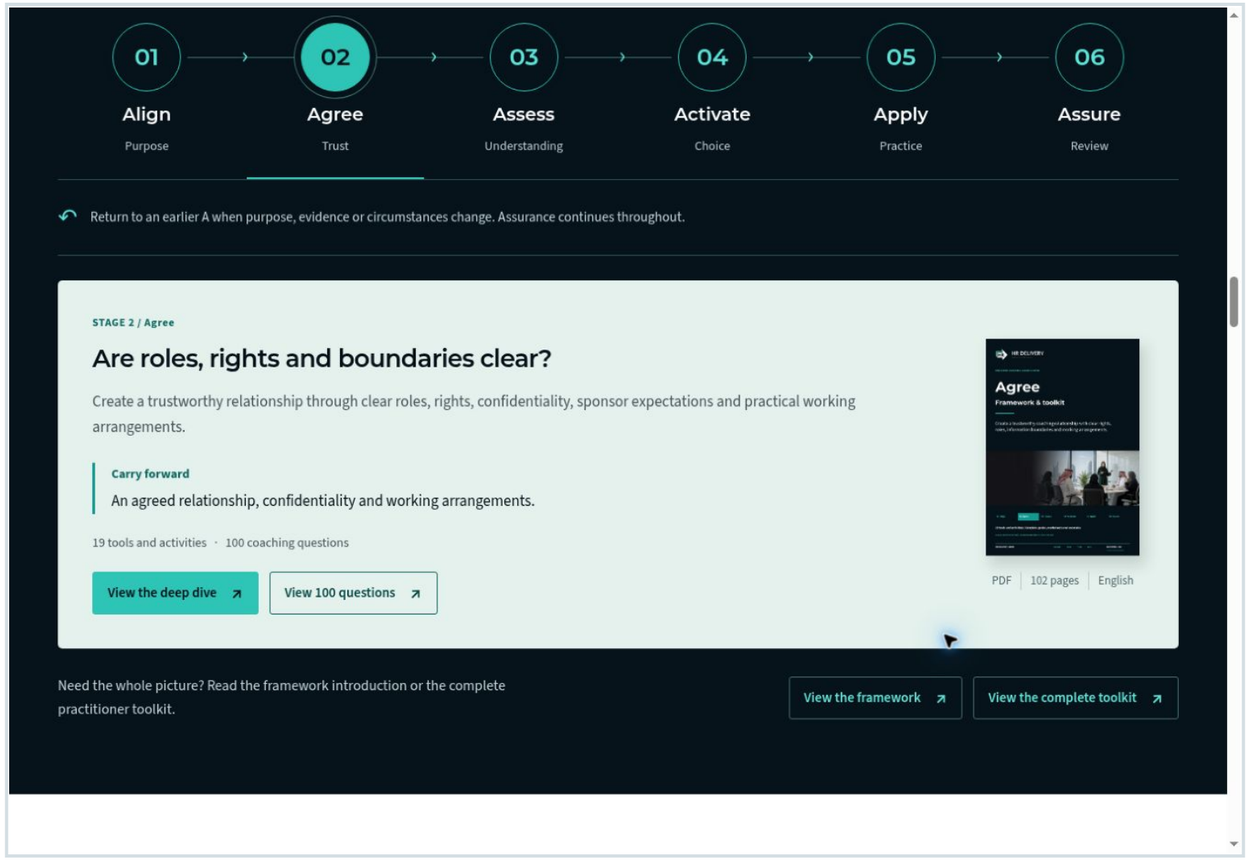
CHECK The question source matches the work you intend to do.

02 Open and navigate the booklet

Choose the relevant 'View 100 questions' link. In the reader, use the contents and page links to locate the required topic.

CHECK You can read the question with its surrounding guidance.

CURRENT LIVE SCREEN



Current Agree stage showing its deep dive and 100-question links.

FIND AND USE THE COACHING LIBRARY / STEPS 3–4 OF 5

OPEN SOURCE

Choose a question pack and use it thoughtfully

03 Read when and how to use it

Check the purpose and development focus before selecting a question. Adapt the conversation to the person's words and context without treating the pack as a script.

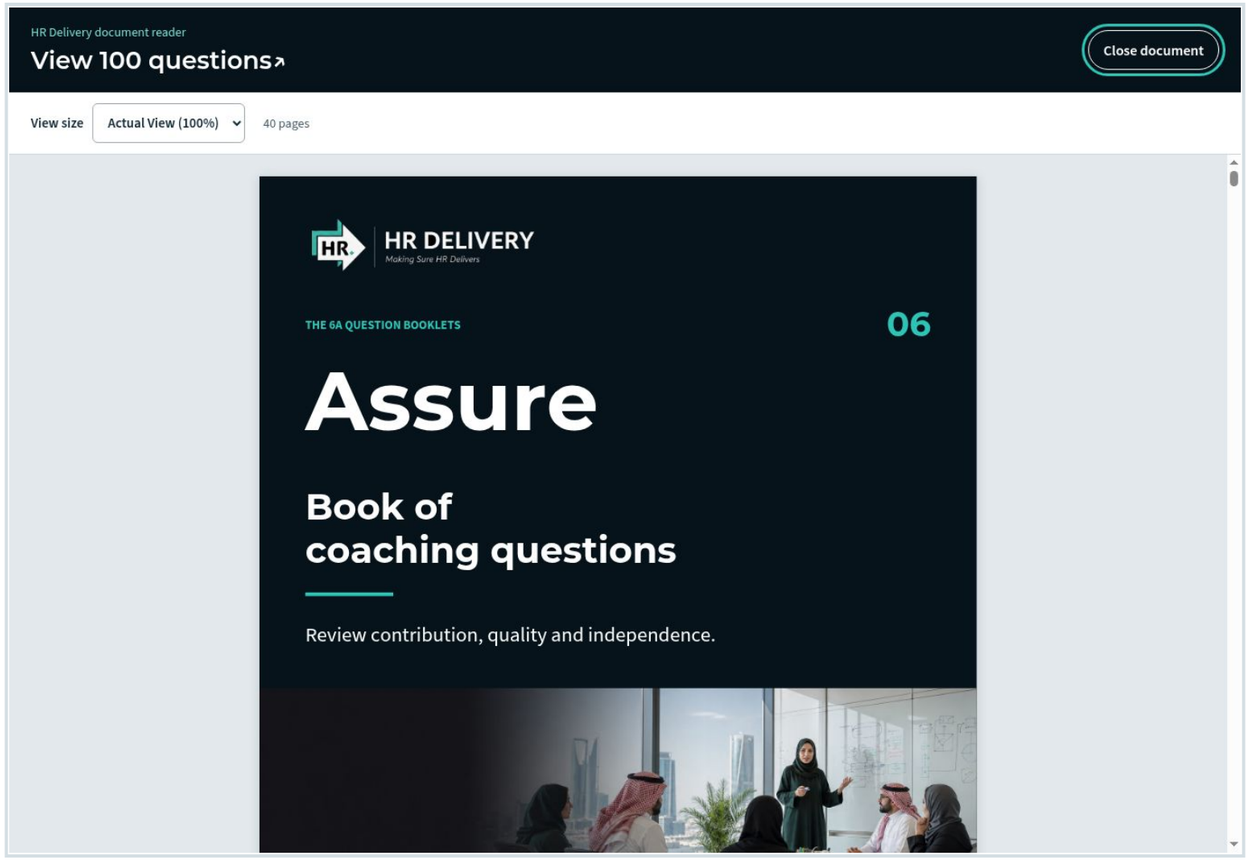
CHECK The question supports understanding rather than leading the person to a preferred answer.

04 Ask one useful question and listen

Give the person time to respond. Follow relevant evidence, assumptions or choices instead of moving through a fixed quantity of questions.

CHECK The next question follows the person's response.

CURRENT LIVE SCREEN



Current public document reader for the Assure 100-question booklet; 40-page count and view-size control are visible.

FIND AND USE THE COACHING LIBRARY / STEPS 5–5 OF 5

OPEN SOURCE

Choose a question pack and use it thoughtfully

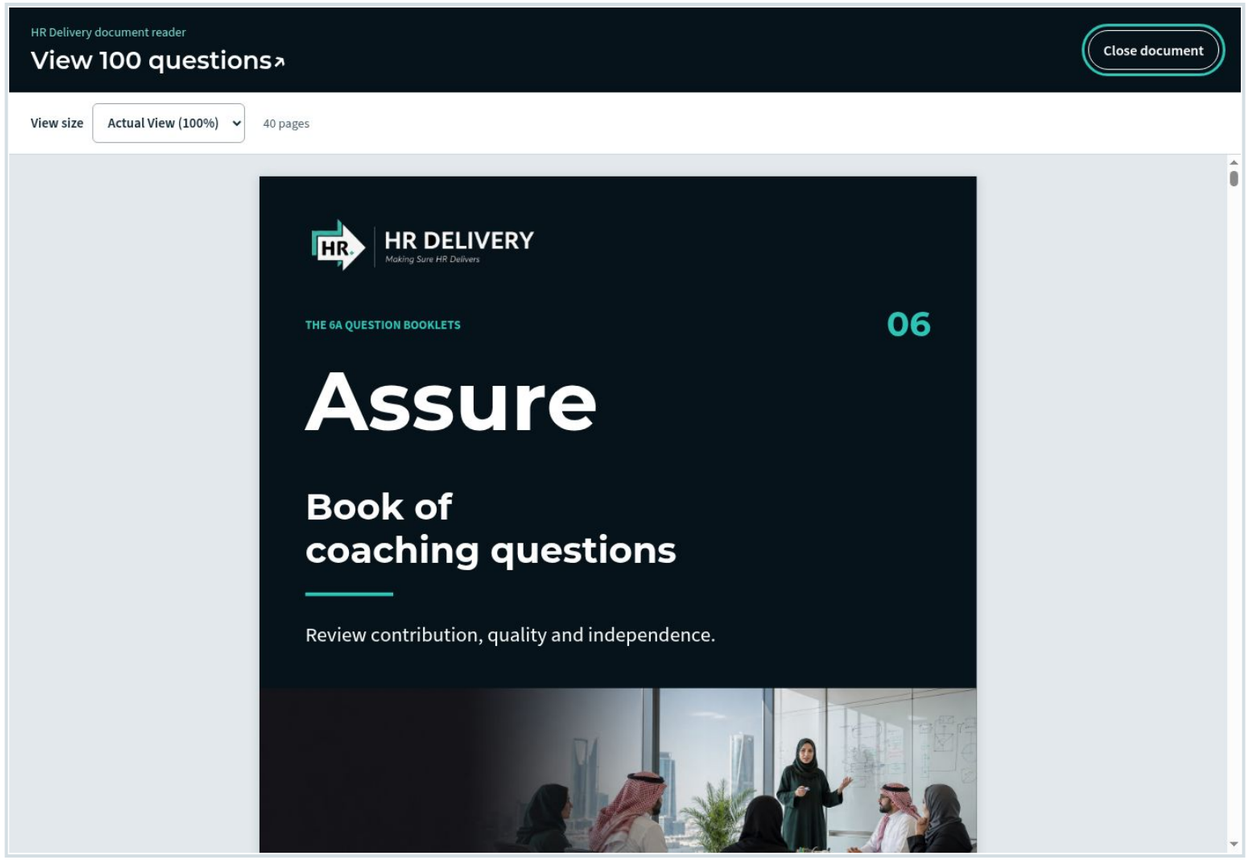
05

Connect reflection to a next step

At the end, ask what the person wants to carry into practice and how they will review what happens.

CHECK The conversation leads to an owned action or a clearer question.

CURRENT LIVE SCREEN



Current public document reader for the Assure 100-question booklet; 40-page count and view-size control are visible.

FIND AND USE THE COACHING LIBRARY / G-01-03

OPEN SOURCE

Choose an activity and matching workbook

Use an exercise with a clear purpose, suitable guidance and practical debrief.

WHO USES THIS Coach and coachee

BEFORE YOU BEGIN

- Agreed development goal
- Appropriate facilitator competence and participant consent

WHAT YOU WILL HAVE

- Completed activity reflection
- Workplace experiment

CHECK BEFORE YOU FINISH

- Read the coach guidance before using a worksheet.
- The PDF reference workbook is reading material; spreadsheet calculations are not interactive.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public collection descriptions and links were inspected. The full contents of every activity were not individually audited.

FIND AND USE THE COACHING LIBRARY / STEPS 1–2 OF 5

OPEN SOURCE

Choose an activity and matching workbook

01 Choose by purpose

Use 'Activity deep dives'. The public library groups activities around purpose and goals; career and leadership; action and balance; review; coaching practice; and programmes.

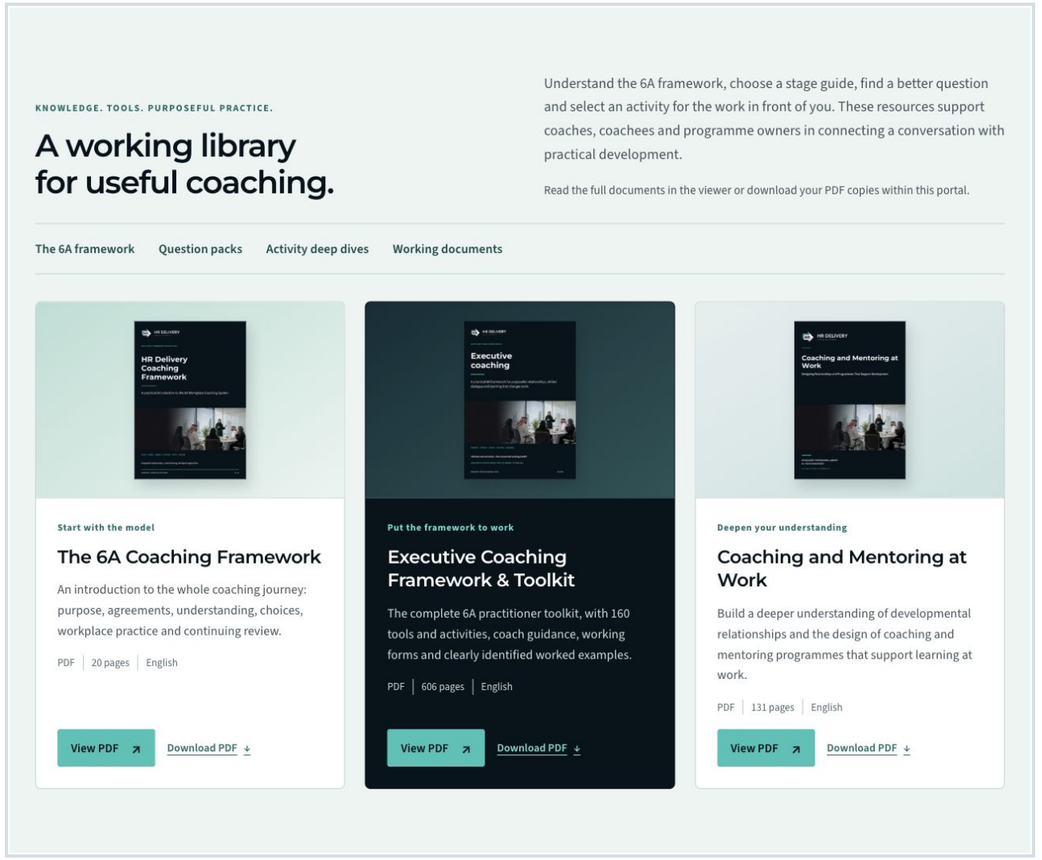
CHECK The activity family matches the coaching goal.

02 Read the activity guide first

Review the aim, instructions, participant materials and debrief. Check suitability for the person, context and available time before introducing the exercise.

CHECK You can explain what the activity is for and how it will be used.

PUBLISHED DEMONSTRATION



Official portal-library demonstration showing collection links and separate View PDF / Download PDF controls.

FIND AND USE THE COACHING LIBRARY / STEPS 3–4 OF 5

OPEN SOURCE

Choose an activity and matching workbook

03 Find the corresponding working page

Use the coachee visual workbook or participant workbook that matches the exercise. The activity directory provides page references into the complete collection.

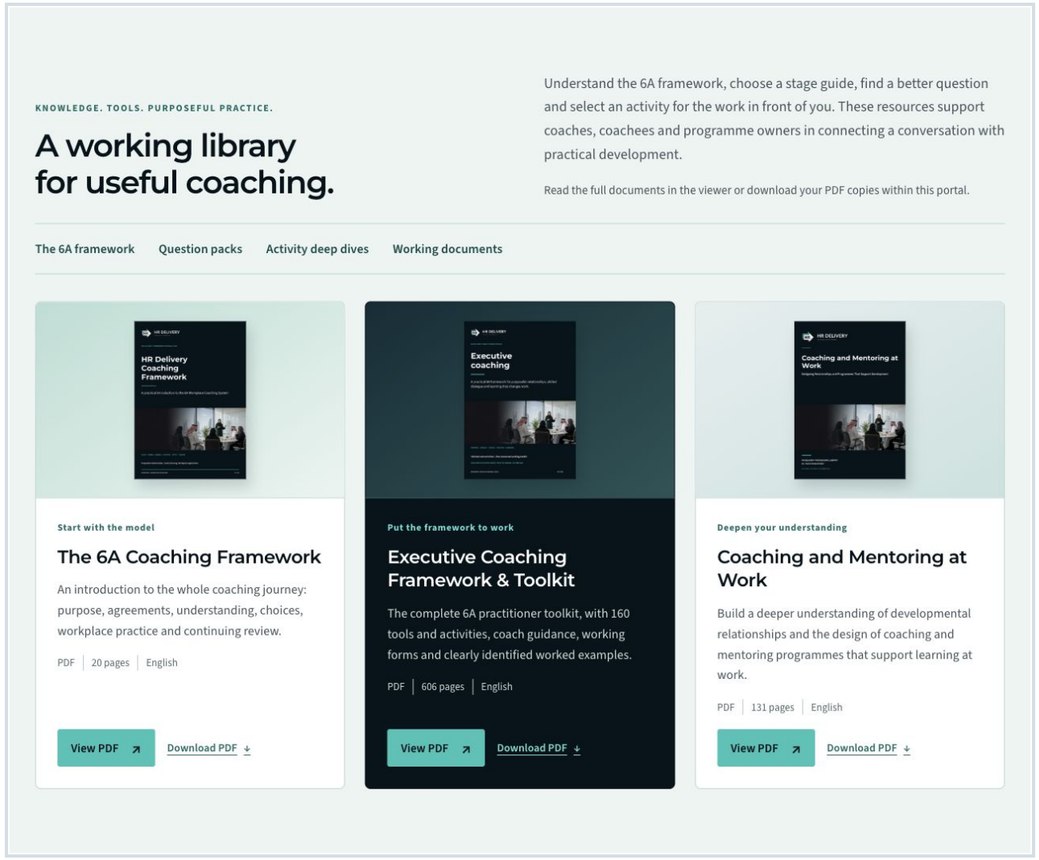
CHECK The participant has the correct prompts and space for their own evidence.

04 Work with the person's own material

Use examples from the agreed coaching focus. Treat worked examples as illustrations and avoid replacing the person's judgement with the model answer.

CHECK The activity reflects the person's actual experience and choices.

PUBLISHED DEMONSTRATION



Official portal-library demonstration showing collection links and separate View PDF / Download PDF controls.

FIND AND USE THE COACHING LIBRARY / STEPS 5–5 OF 5

OPEN SOURCE

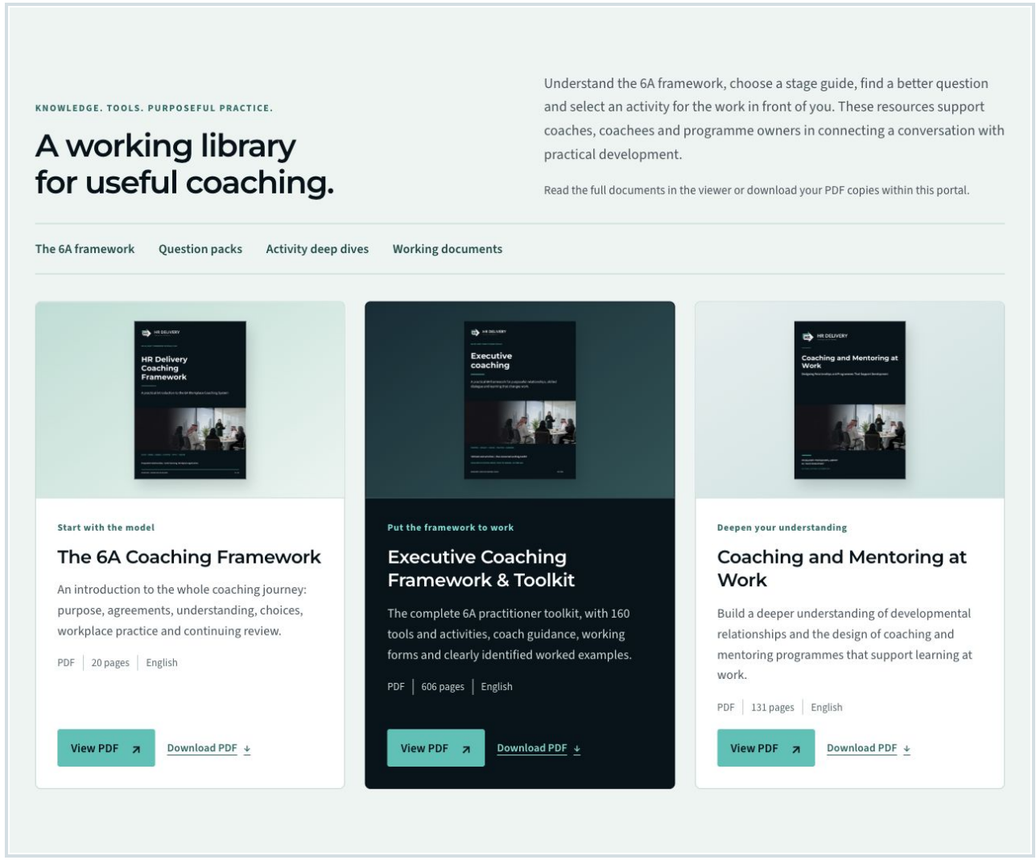
Choose an activity and matching workbook

05 Debrief and plan an experiment

Discuss what was learned, what remains uncertain and one practical action to test. Agree feedback and a review point.

CHECK The activity ends with a useful conclusion and workplace experiment.

PUBLISHED DEMONSTRATION



Official portal-library demonstration showing collection links and separate View PDF / Download PDF controls.

02

Work through the 6A framework

Use six connected responsibilities and return to earlier stages when needed.

02 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

WORK THROUGH THE 6A FRAMEWORK / G-02-01

OPEN SOURCE

Navigate the six stages and choose the next resource

Identify the stage of work and open its supporting guidance.

WHO USES THIS Coach and coachee

BEFORE YOU BEGIN

- A live coaching question
- An understanding of the relationship and purpose

WHAT YOU WILL HAVE

- Chosen stage and resource
- A clear carry-forward from the conversation

CHECK BEFORE YOU FINISH

- The model is not a rigid sequence of six appointments.
- Return to purpose or agreement when circumstances change.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

WORK THROUGH THE 6A FRAMEWORK / STEPS 1–2 OF 6

OPEN SOURCE

Navigate the six stages and choose the next resource

01 Select Align

Open 'The 6A framework' and choose 'Align Purpose'. Read whether coaching is the right response and what value the engagement should create.

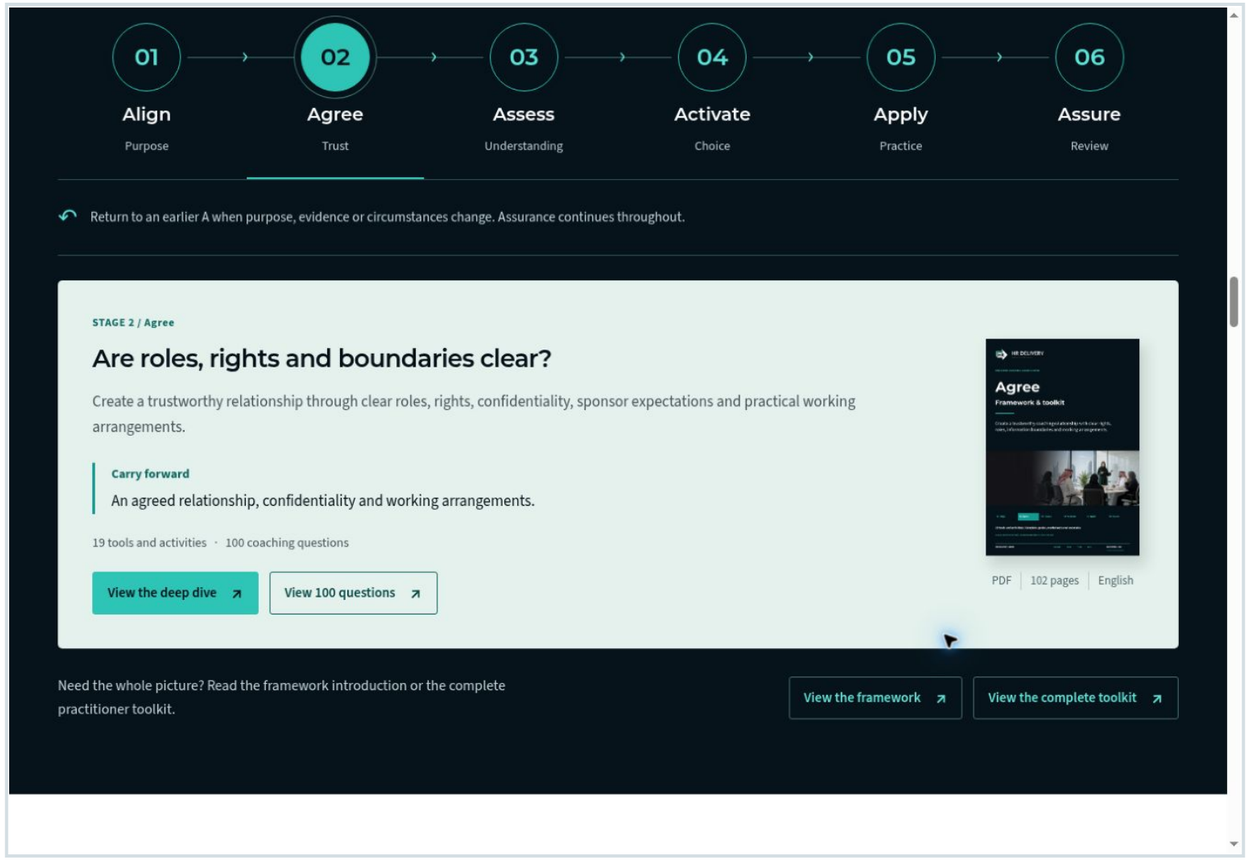
CHECK The intended carry-forward is a charter and clear account of expected value.

02 Select Agree

Choose 'Agree Trust'. Clarify roles, rights, boundaries, confidentiality, sponsor expectations and practical arrangements before relying on the relationship.

CHECK The carry-forward is an agreed relationship and working arrangements.

CURRENT LIVE SCREEN



Current full Agree stage panel and six-stage navigation.

WORK THROUGH THE 6A FRAMEWORK / STEPS 3–4 OF 6

OPEN SOURCE

Navigate the six stages and choose the next resource

03 Select Assess

Choose 'Assess Understanding'. Consider work context, evidence, feedback and assessment information proportionately before agreeing a useful development goal.

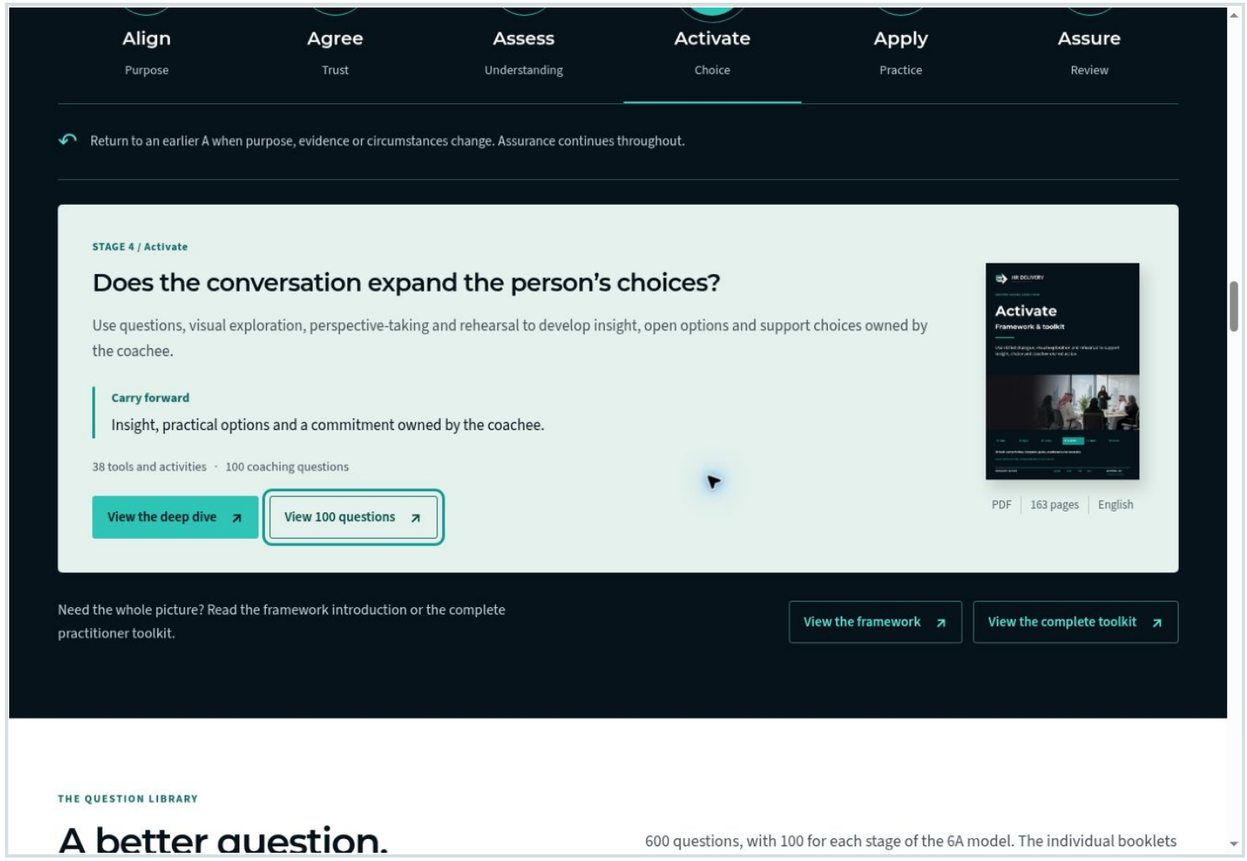
CHECK The carry-forward is a goal, starting point and contextual understanding.

04 Select Activate

Choose 'Activate Choice'. Explore perspectives, questions and rehearsal that widen the person’s options and support their own decision.

CHECK The carry-forward is insight, practical options and an owned commitment.

CURRENT LIVE SCREEN



Current Activate stage panel showing its purpose, carry-forward and resource controls.

WORK THROUGH THE 6A FRAMEWORK / STEPS 5–6 OF 6

OPEN SOURCE

Navigate the six stages and choose the next resource

05 Select Apply

Choose 'Apply Practice'. Design a workplace experiment, identify support and feedback, and decide what experience will teach you.

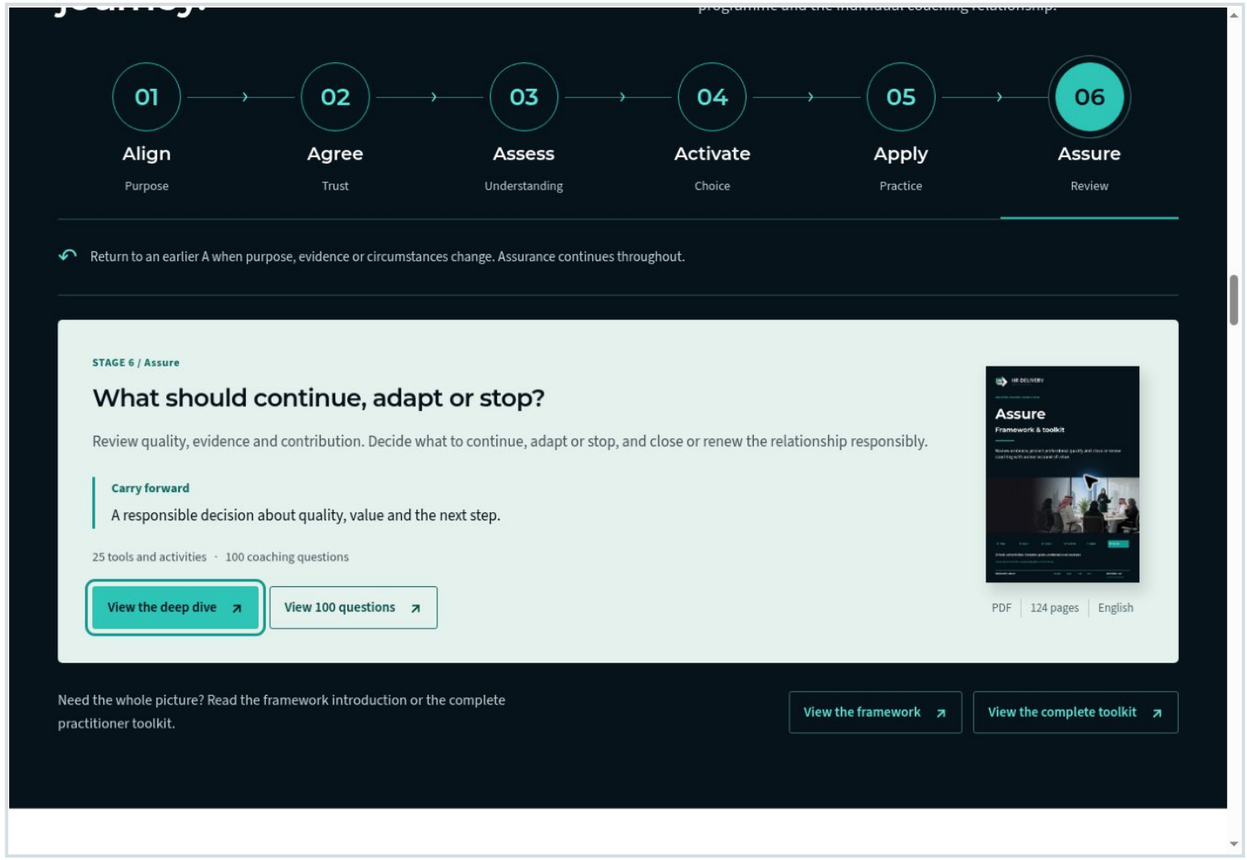
CHECK The carry-forward is an application and learning-transfer plan.

06 Select Assure

Choose 'Assure Review'. Review quality, evidence and contribution, then decide what should continue, adapt or stop. Open the stage's deep dive or question pack as needed.

CHECK The carry-forward is a responsible decision about value and the next step.

CURRENT LIVE SCREEN



Current complete Assure stage panel, carry-forward and document links.

WORK THROUGH THE 6A FRAMEWORK / G-02-02

OPEN SOURCE

Prepare agreements, session records and reviews

Use working documents that support clarity without over-recording a conversation.

WHO USES THIS Coach and programme owner

BEFORE YOU BEGIN

- Agreed purpose and confidentiality
- An authorised record location and retention approach

WHAT YOU WILL HAVE

- Coaching agreement
- Session or progress record
- Review or closure record

CHECK BEFORE YOU FINISH

- Use each blank form alongside its matching guidance.
- Sponsor reporting respects the agreed boundary.

The expected option is missing. Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The public page describes matching collections of 64 guidance documents and 64 blank operational records; private record storage was not inspected.

WORK THROUGH THE 6A FRAMEWORK / STEPS 1–2 OF 5

OPEN SOURCE

Prepare agreements, session records and reviews

01 Open working documents

Choose 'Working documents'. The public collection pairs 'Supporting Documentation Pack for Coaches' with 'Coaching Operational Forms'.

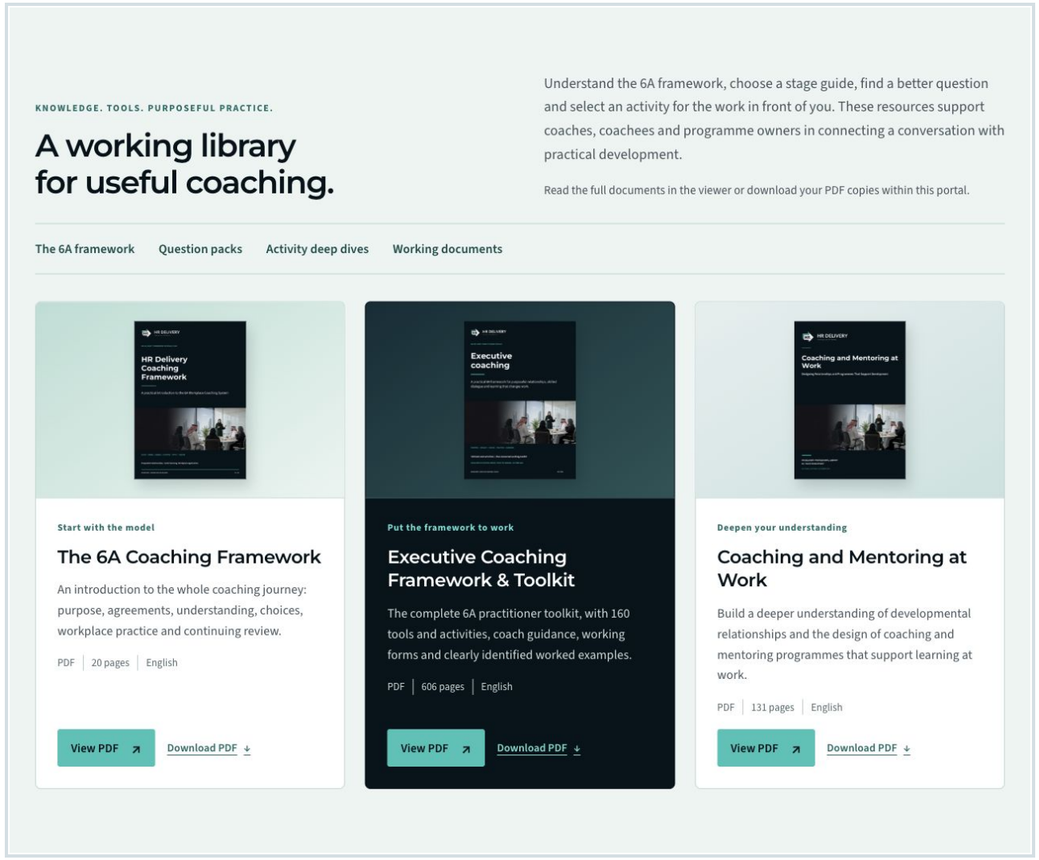
CHECK Guidance and blank records are available as separate documents.

02 Find the record that serves the purpose

Choose the relevant agreement, preparation, goal, session, progress, review or closure record. Use the guidance pack to understand the matching blank form.

CHECK The document supports a defined part of the coaching process.

PUBLISHED DEMONSTRATION



Official portal-library demonstration showing collection links and separate View PDF / Download PDF controls.

WORK THROUGH THE 6A FRAMEWORK / STEPS 3–4 OF 5

OPEN SOURCE

Prepare agreements, session records and reviews

03 Agree what the record will contain

Explain what stays within coaching, what a sponsor may receive and any limits to confidentiality. Record only what is needed for the agreed purpose.

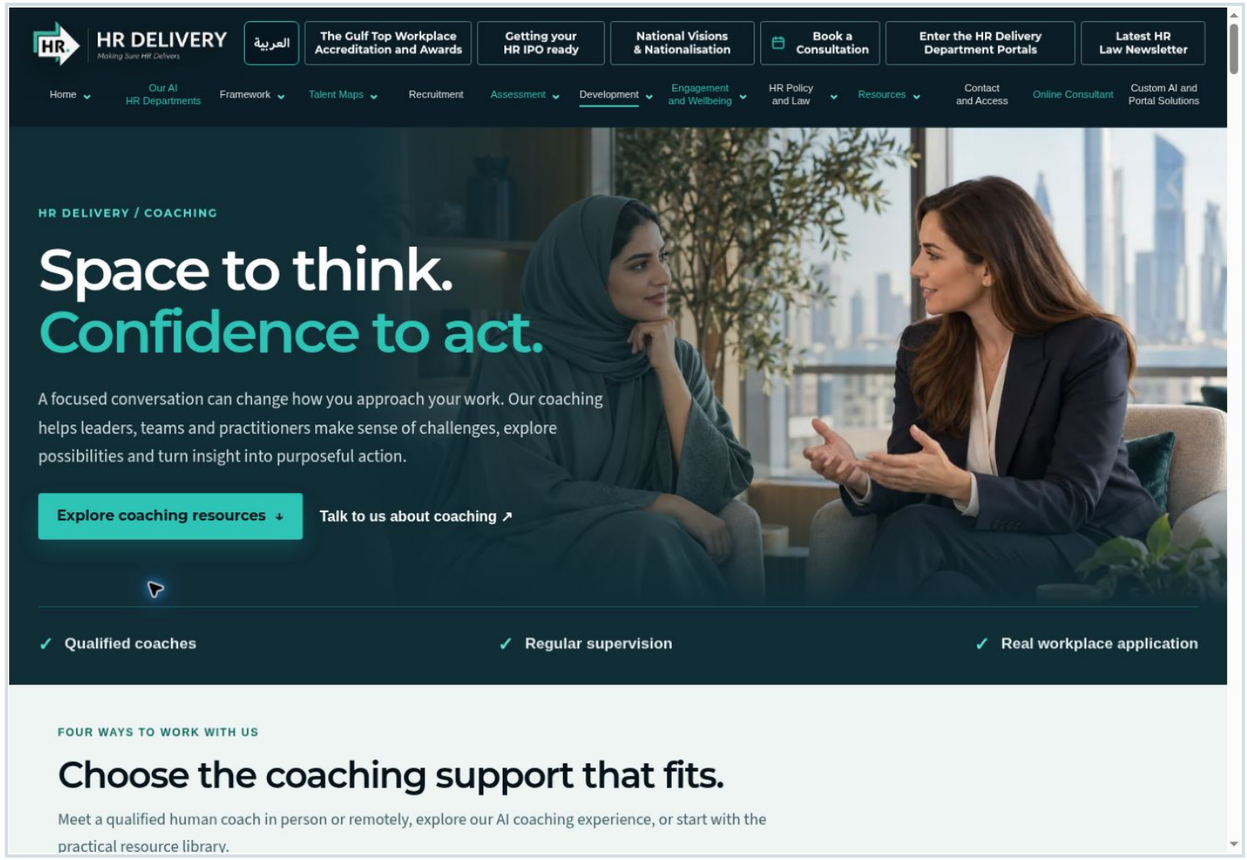
CHECK The people involved understand the record and its audience.

04 Complete the working record

Use clear goals, actions, ownership and review dates. Distinguish the person's own reflection from a coach's observation or an agreed decision.

CHECK The record can be understood without reconstructing the whole conversation.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

WORK THROUGH THE 6A FRAMEWORK / STEPS 5–5 OF 5

OPEN SOURCE

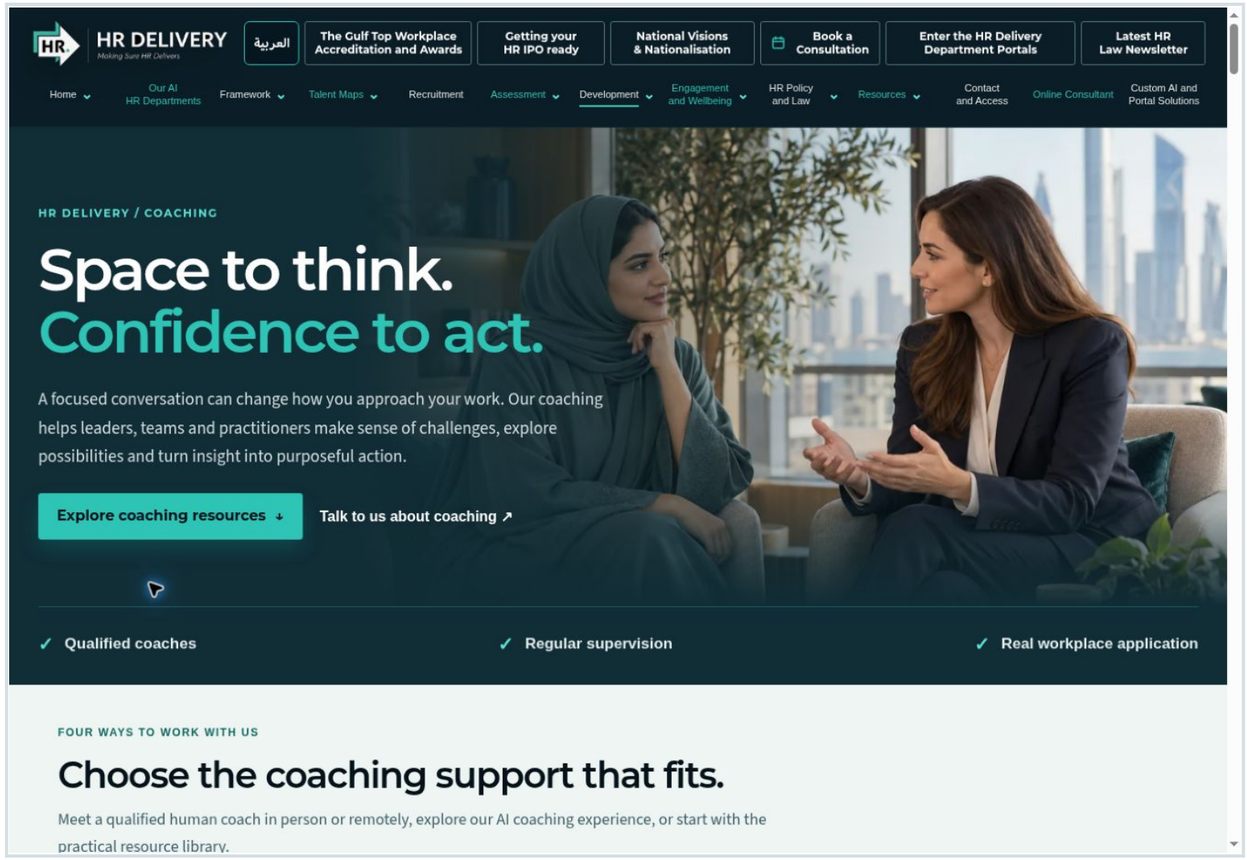
Prepare agreements, session records and reviews

05 Review and close responsibly

At review or closure, record progress evidence, remaining work and the agreed next arrangement. Store and share only through the authorised process.

CHECK The document supports continuity and an explicit next step.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

03

Arrange the right coaching pathway

Prepare a clear enquiry and connect coaching with relevant evidence.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

ARRANGE THE RIGHT COACHING PATHWAY / G-03-01

OPEN SOURCE

Arrange face-to-face or remote human coaching

Agree a purposeful coaching engagement and practical working arrangements.

WHO USES THIS Coachee or programme sponsor

BEFORE YOU BEGIN

- A concise development goal
- Preferred language, format and availability

WHAT YOU WILL HAVE

- Coaching enquiry
- Agreed engagement and confirmed appointment

CHECK BEFORE YOU FINISH

- A submitted request does not itself confirm coach availability.
- Agree confidentiality and sponsor information in advance.

The expected option is missing. Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Human service arrangements are described publicly. The protected booking calendar was not inspected.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 1–2 OF 5

OPEN SOURCE

Arrange face-to-face or remote human coaching

01 Choose the delivery setting

Read the face-to-face and remote human coaching sections. Choose the setting that supports the work and allows a focused, private conversation.

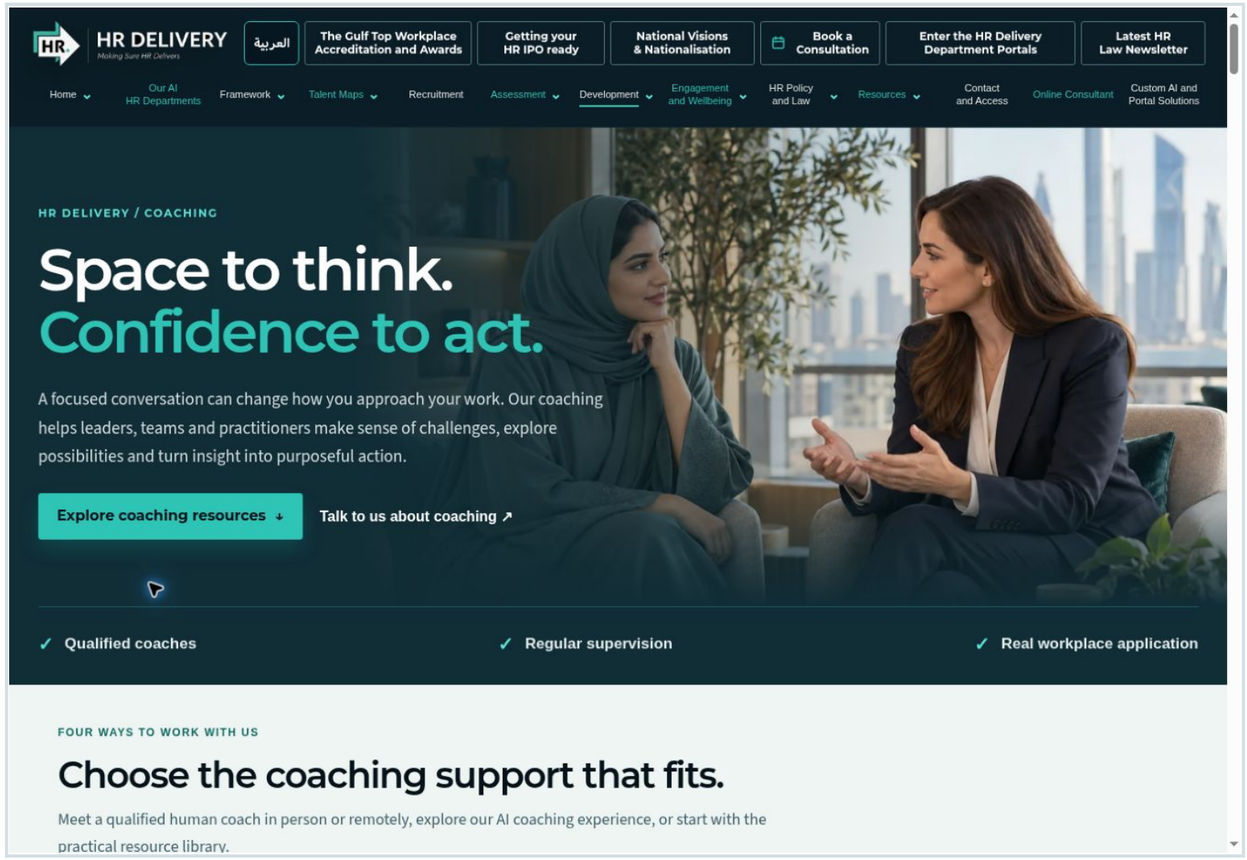
CHECK Your preference is connected to the practical need.

02 Prepare the enquiry

Describe the role, live challenge and desired improvement. State whether the enquiry is personal or sponsored and identify any timing or location constraints.

CHECK HR Delivery has enough information to discuss fit and scope.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 3–4 OF 5

OPEN SOURCE

Arrange face-to-face or remote human coaching

03 Use the appropriate contact route

From the subscription page, choose 'Discuss coaching with us ↗', or use the Lama contact route. State whether you prefer face-to-face or remote human coaching; keep detailed confidential session material out of the general enquiry.

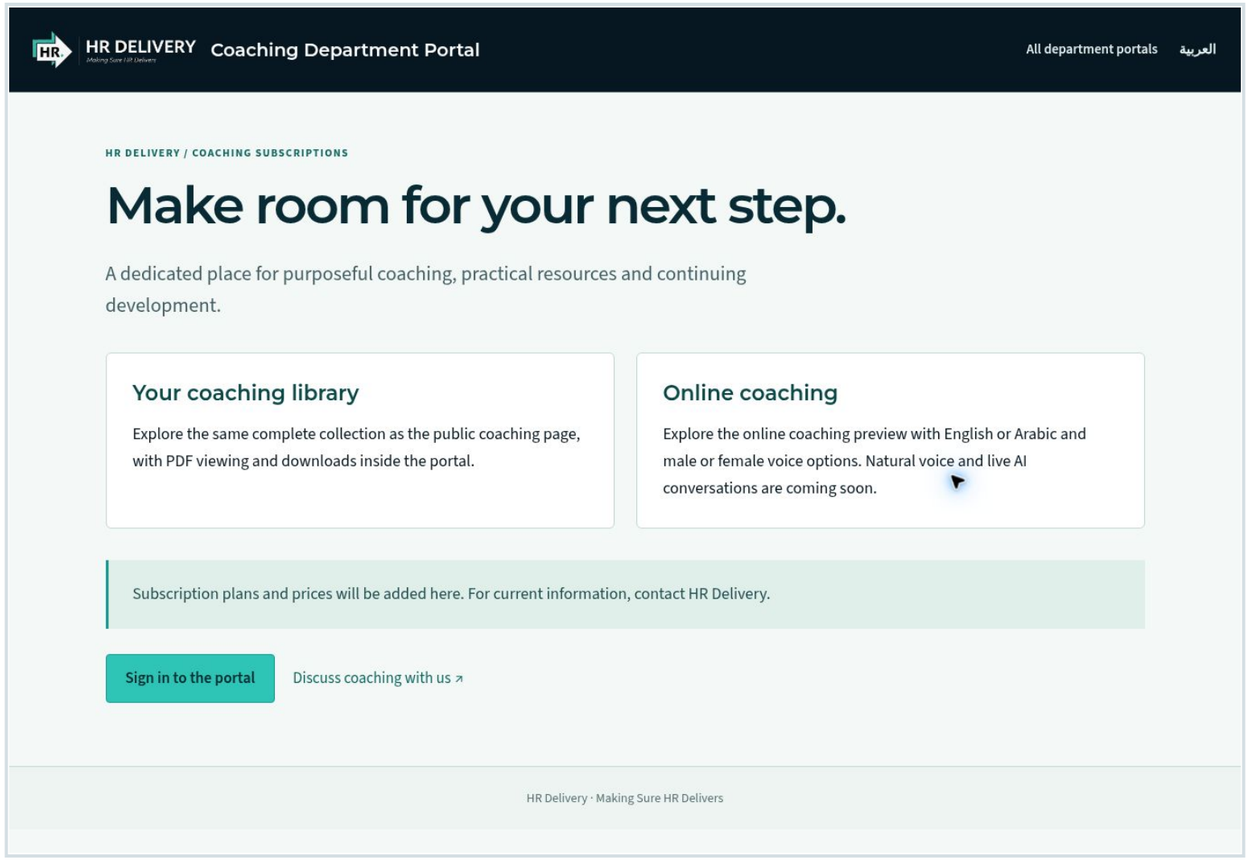
CHECK The request can be routed to the coaching service.

04 Agree the engagement before it begins

Confirm coach availability, scope, location or remote format, confidentiality, sponsor reporting and how progress will be reviewed.

CHECK Working arrangements are explicit before the first session.

PRIOR REVIEWED SCREEN



Previously reviewed coaching subscription and enquiry route.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 5–5 OF 5

OPEN SOURCE

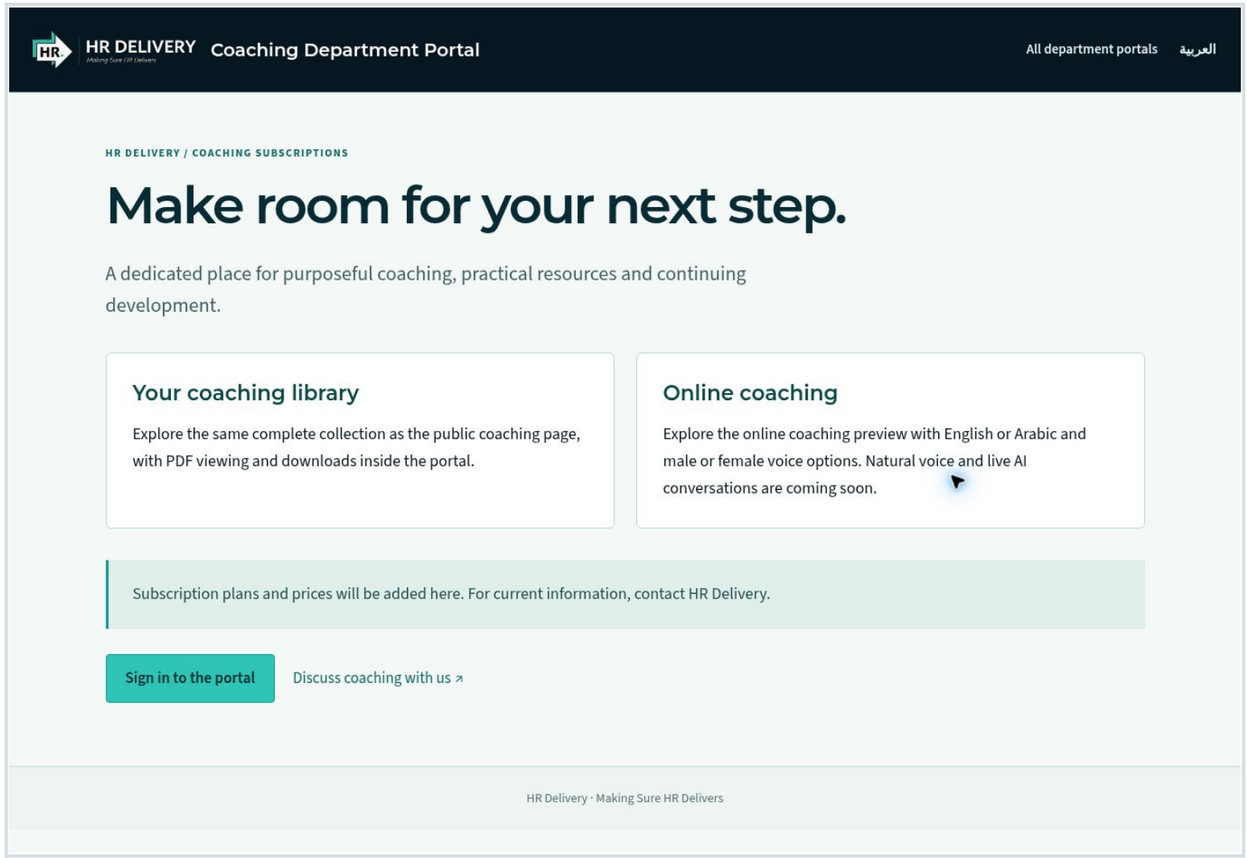
Arrange face-to-face or remote human coaching

05 Confirm the appointment separately

Keep the agreed date, time zone and joining or location details. Treat an enquiry or booking request as pending until HR Delivery confirms it.

CHECK You know when, where and with whom the session will take place.

PRIOR REVIEWED SCREEN



Previously reviewed coaching subscription and enquiry route.

ARRANGE THE RIGHT COACHING PATHWAY / G-03-02

OPEN SOURCE

Prepare assessment-linked coaching

Use the report as evidence for a development conversation.

WHO USES THIS Coachee and appropriately qualified coach

BEFORE YOU BEGIN

- Your own assessment report
- Role context and relevant work examples

WHAT YOU WILL HAVE

- Assessment-informed goal
- Development experiment and review plan

CHECK BEFORE YOU FINISH

- Do not infer automatic portal access to assessment results.
- Keep the meaning and limitations of the assessment clear.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The pathway is described on the public coaching pages; no private assessment report or automatic linkage was accessed.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 1–2 OF 5

OPEN SOURCE

Prepare assessment-linked coaching

01 Identify the right report

Confirm the assessment name, date and report version. A sample report explains a format; it does not supply evidence about you.

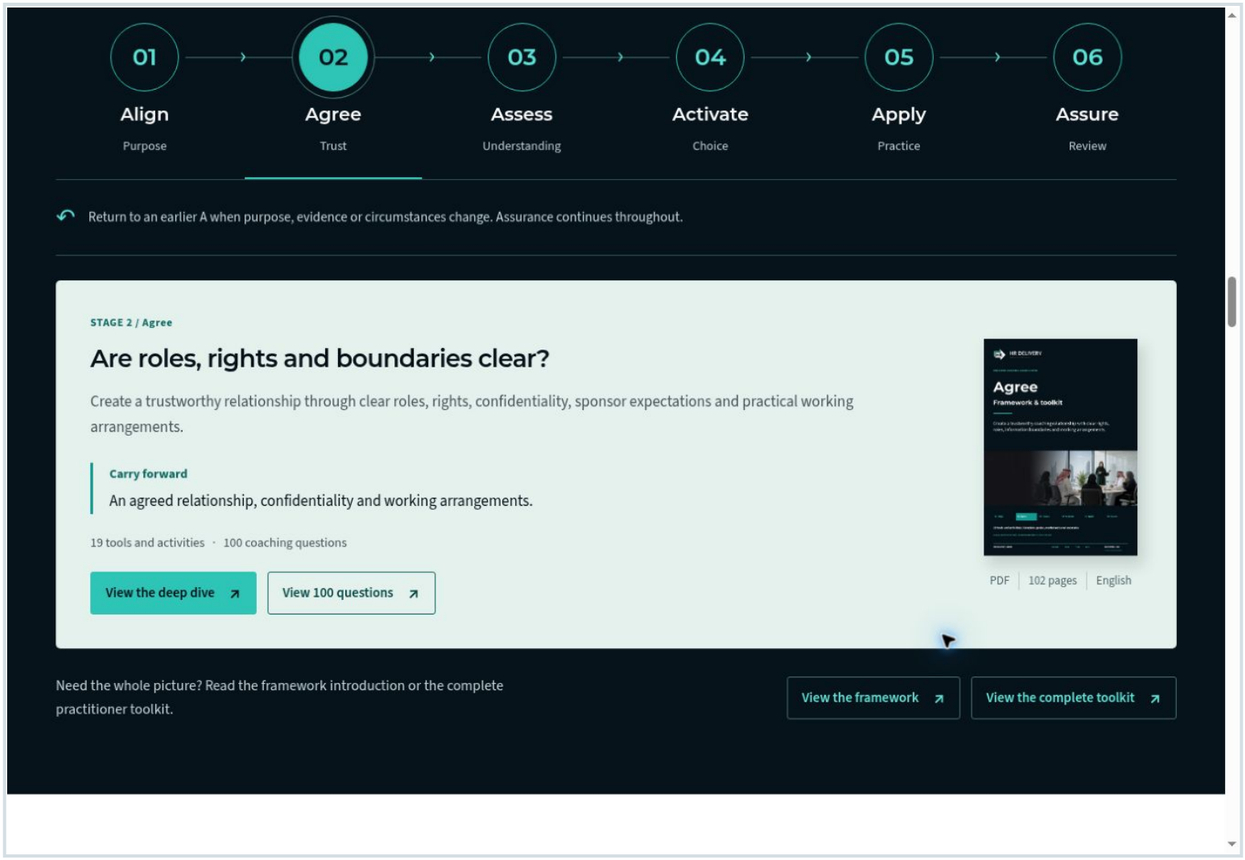
CHECK The conversation starts from the correct personal evidence.

02 Agree the focus and sharing

Decide which findings are relevant to the coaching purpose and what can be shared with the coach or sponsor. Use the agreed secure route for personal reports.

CHECK Assessment information is used within the authorised purpose.

CURRENT LIVE SCREEN



6A resource navigation supports contracting and evidence-led coaching.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 3–4 OF 5

OPEN SOURCE

Prepare assessment-linked coaching

03 Explore the pattern in context

Discuss strengths, development priorities and possible explanations alongside work examples. Ask where the results fit or conflict with lived experience.

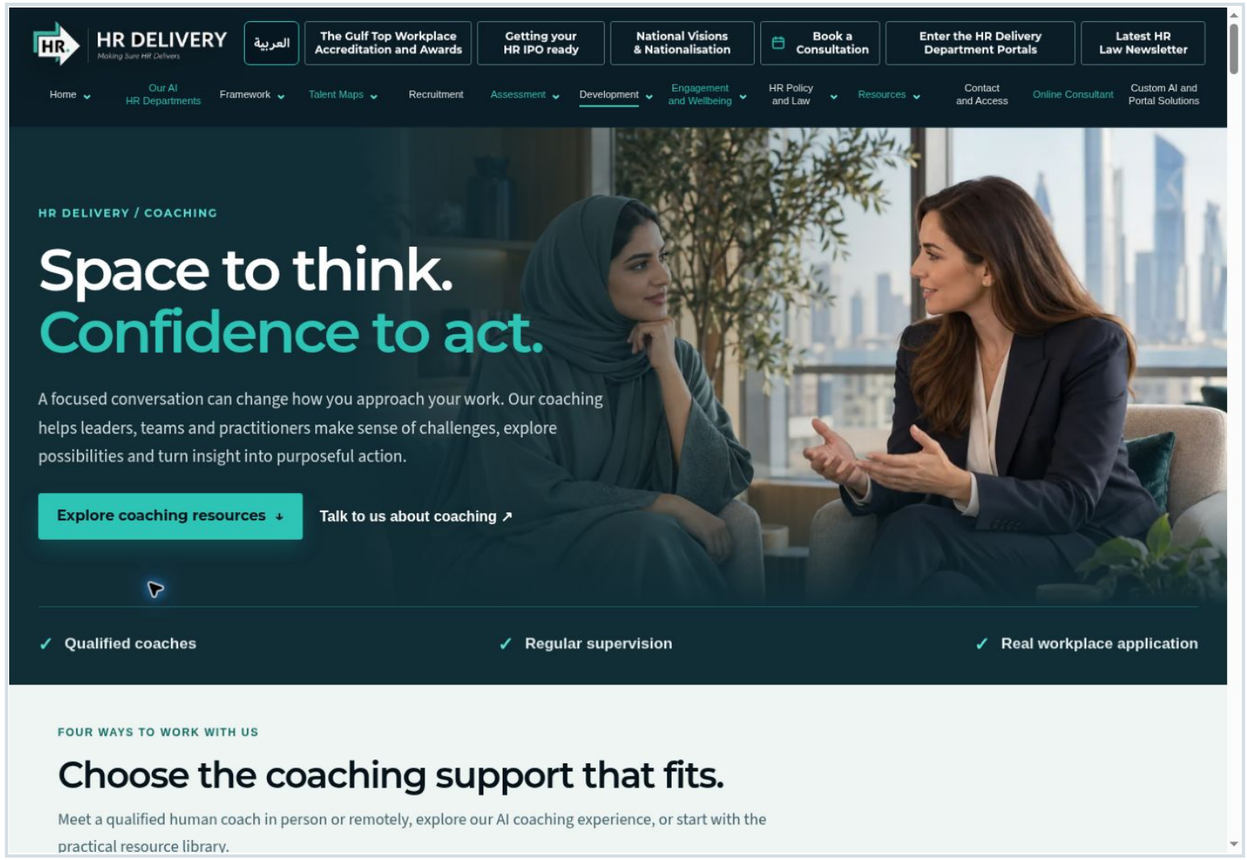
CHECK The report informs understanding without reducing the person to a label.

04 Choose a development priority

Select a behaviour or capability whose improvement matters in the role. Connect it with a relevant 6A question, activity, manual or learning route.

CHECK The coaching goal has a practical relationship to the evidence.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 5–5 OF 5

OPEN SOURCE

Prepare assessment-linked coaching

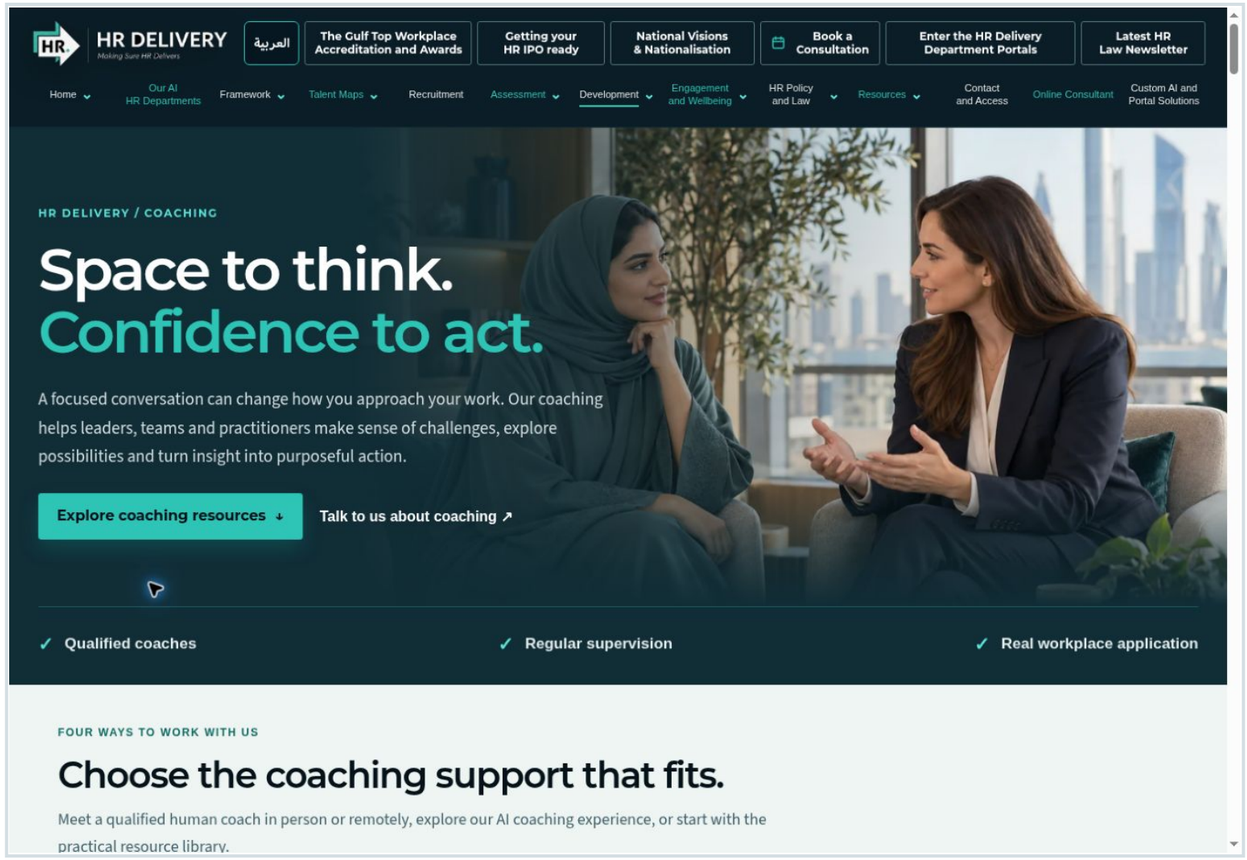
05

Test and review an action

Agree a workplace experiment, feedback source and review date. Return to the assessment only where it helps interpret progress.

CHECK Development is judged through application beyond the report.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

ARRANGE THE RIGHT COACHING PATHWAY / G-03-03

OPEN SOURCE

Prepare team coaching

Use collective evidence to improve how the team works.

WHO USES THIS Team sponsor, team and coach

BEFORE YOU BEGIN

- Shared team purpose
- Agreed assessment or diagnostic basis where relevant

WHAT YOU WILL HAVE

- Team coaching brief
- Shared working commitments

CHECK BEFORE YOU FINISH

- Assessment findings are not labels or rankings of team members.
- The sponsor’s information rights are agreed explicitly.

The expected option is missing. Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The public pathway was reviewed; no private team assessment or coaching record was opened.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 1–2 OF 5

OPEN SOURCE

Prepare team coaching

01 Define the collective purpose

Describe the team's work, shared challenge and desired improvement. Agree whether the team is the appropriate unit for the engagement.

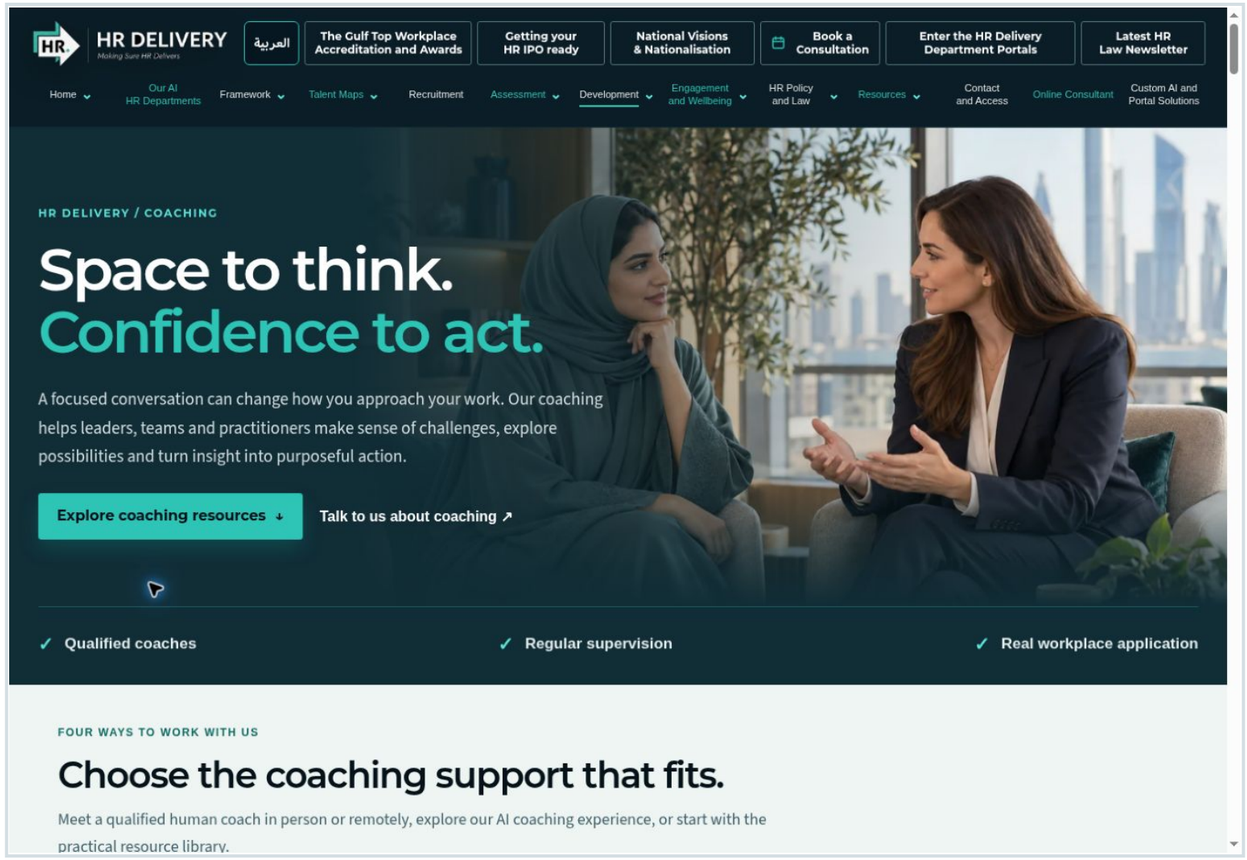
CHECK The coaching focus concerns collective work rather than ranking individuals.

02 Agree participation and information boundaries

Clarify who takes part, the sponsor relationship and what team findings may be shared. Establish how individual and collective information will be handled.

CHECK The team understands the conditions for participation.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 3–4 OF 5

OPEN SOURCE

Prepare team coaching

03 Prepare the evidence

Where appropriate, use Team Workstyles Indicator, Team Contribution Profile or Team Performance WatchPoints after an agreed assessment and debrief.

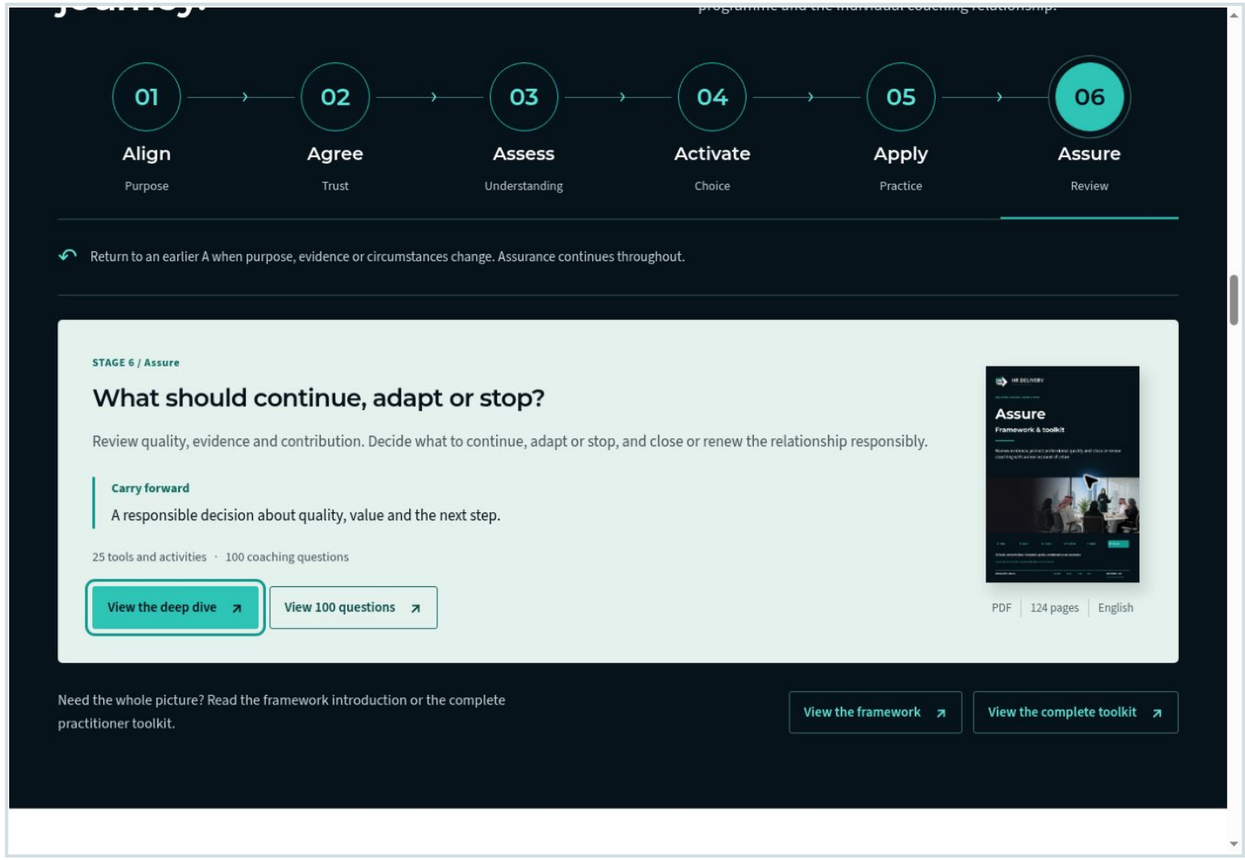
CHECK Findings provide a starting point for dialogue.

04 Work on a real team challenge

Use the relevant 6A stage and activity to explore decisions, communication, feedback or accountability. Examine patterns through actual examples.

CHECK The conversation remains grounded in the team's work.

CURRENT LIVE SCREEN



Current complete Assure stage panel, carry-forward and document links.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 5–5 OF 5

OPEN SOURCE

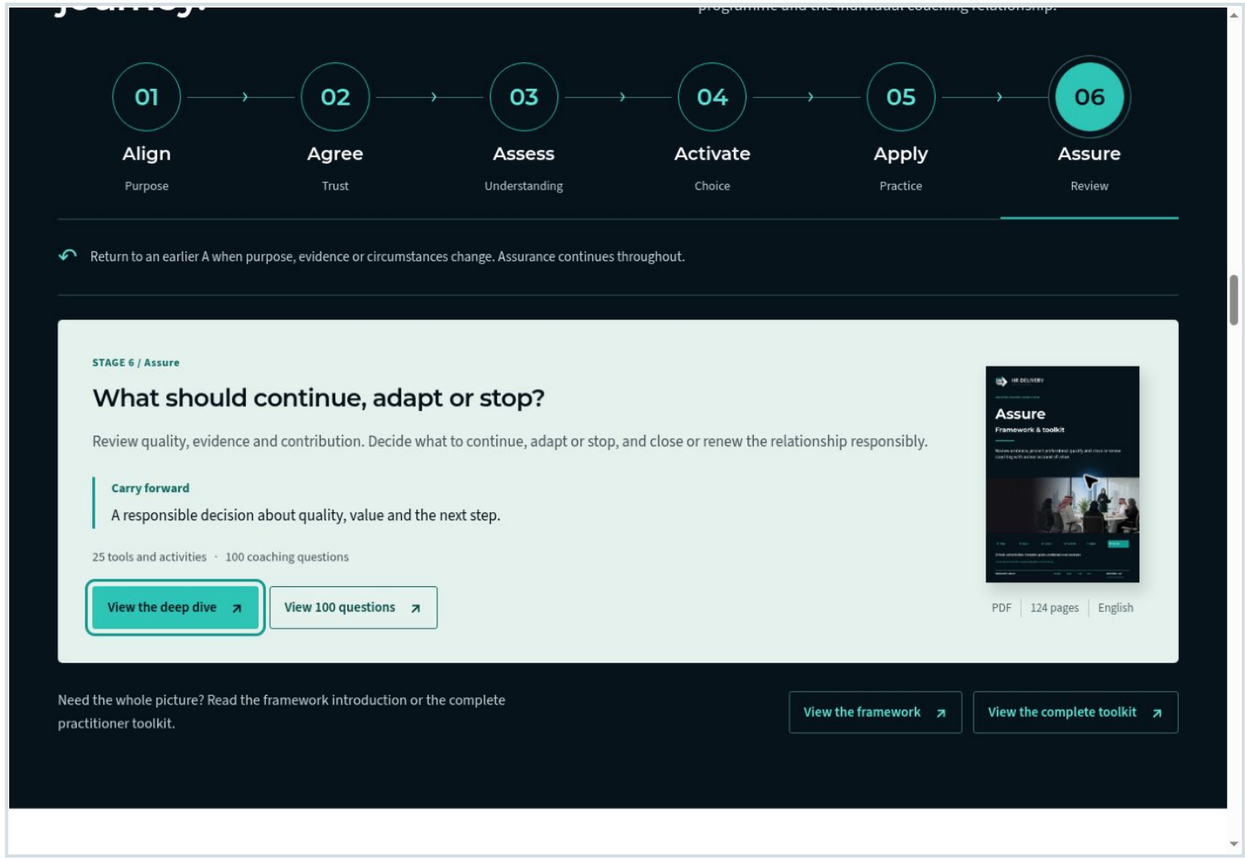
Prepare team coaching

05 Agree shared commitments

Record the team's chosen changes, owners and review evidence. Revisit the commitments through real work and adapt them as needed.

CHECK The team can explain what it will do differently and how it will know.

CURRENT LIVE SCREEN



Current complete Assure stage panel, carry-forward and document links.

ARRANGE THE RIGHT COACHING PATHWAY / G-03-04

OPEN SOURCE

Connect coaching with a development programme

Make learning transfer a supported part of the programme.

WHO USES THIS Learner, coach and programme owner

BEFORE YOU BEGIN

- Programme learning outcomes
- A workplace opportunity for application

WHAT YOU WILL HAVE

- Application goal
- Coaching schedule linked to programme
- Workplace evidence and next actions

CHECK BEFORE YOU FINISH

- Coaching complements instruction and practice.
- Review application rather than session attendance alone.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The public page connects coaching with six development programmes and relevant workshops; private programme linkage was not exercised.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 1–2 OF 5

OPEN SOURCE

Connect coaching with a development programme

01 Choose an application goal before learning

Identify a practical task or behaviour that matters in the role. Agree how the programme can support it and what the manager can enable.

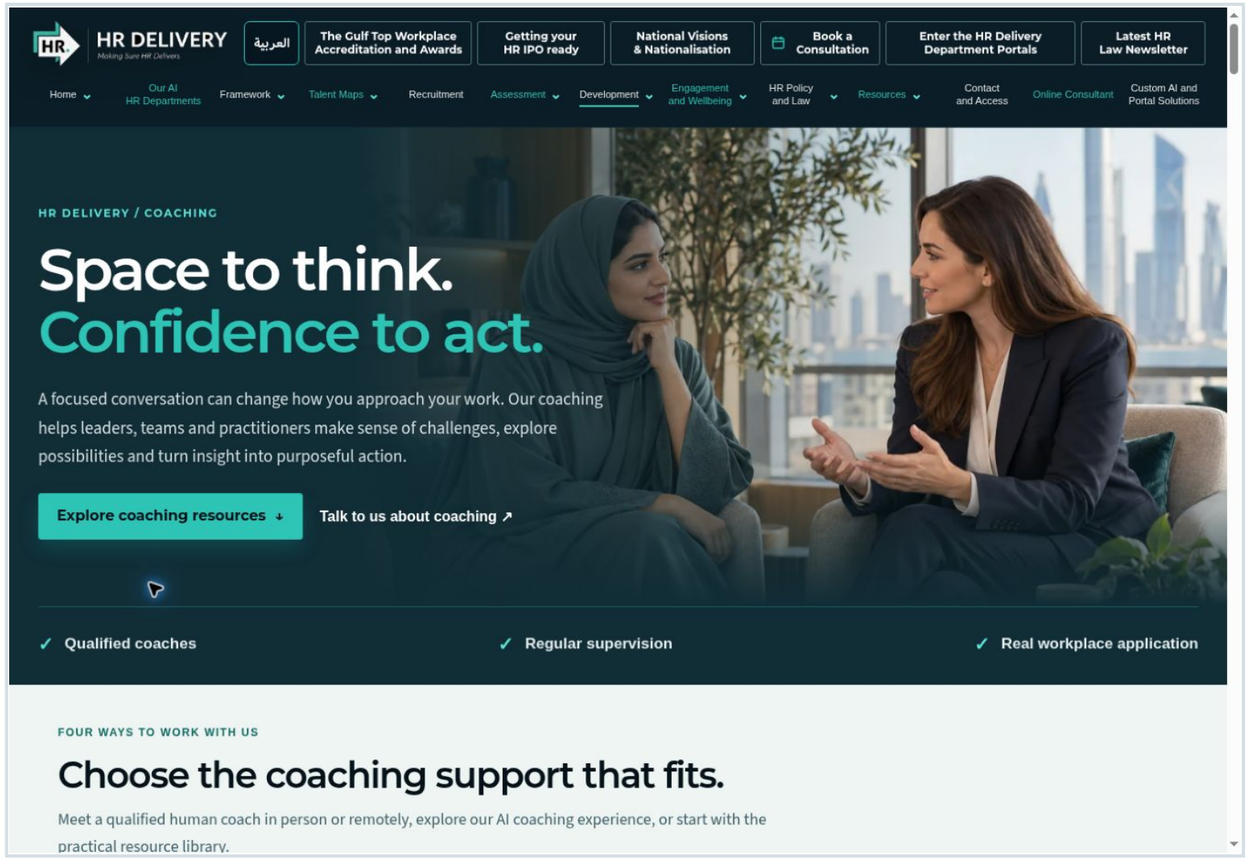
CHECK The learner has a useful focus for the programme.

02 Agree the coaching pattern

Decide whether support is needed before, between or after learning activities. Coordinate sessions with programme milestones and work opportunities.

CHECK Coaching fits the learning sequence and workplace timetable.

PRIOR REVIEWED SCREEN



Previously reviewed public coaching landing page and resource-entry route.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 3–4 OF 5

OPEN SOURCE

Connect coaching with a development programme

03 Use the relevant resources

Select a 6A guide, question pack or activity that helps the learner understand an obstacle, practise a conversation or test an approach.

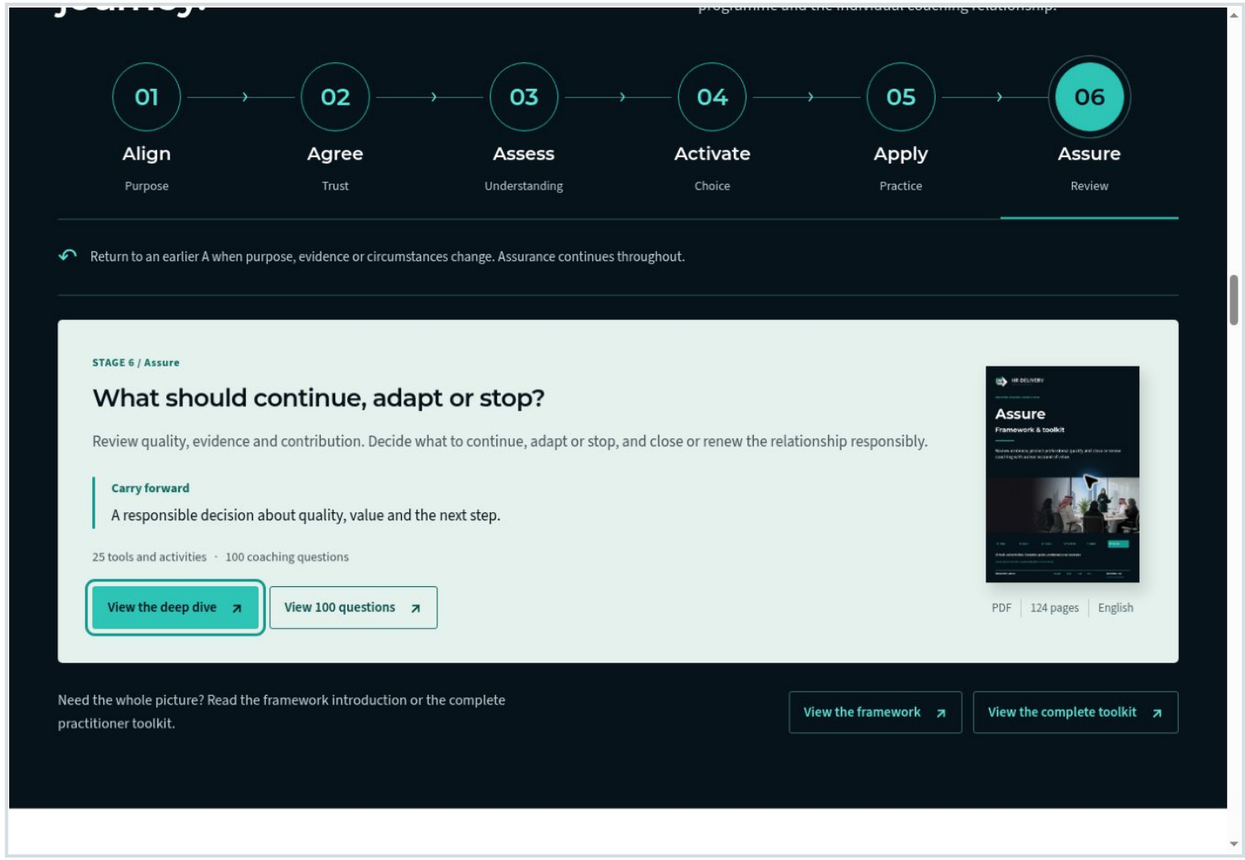
CHECK The coaching resource serves the current application need.

04 Practise and gather feedback

Try the selected behaviour in real work, capture a proportionate example and ask for relevant feedback. Bring the evidence to the next conversation.

CHECK Reflection is informed by what happened in practice.

CURRENT LIVE SCREEN



Current complete Assure stage panel, carry-forward and document links.

ARRANGE THE RIGHT COACHING PATHWAY / STEPS 5–5 OF 5

OPEN SOURCE

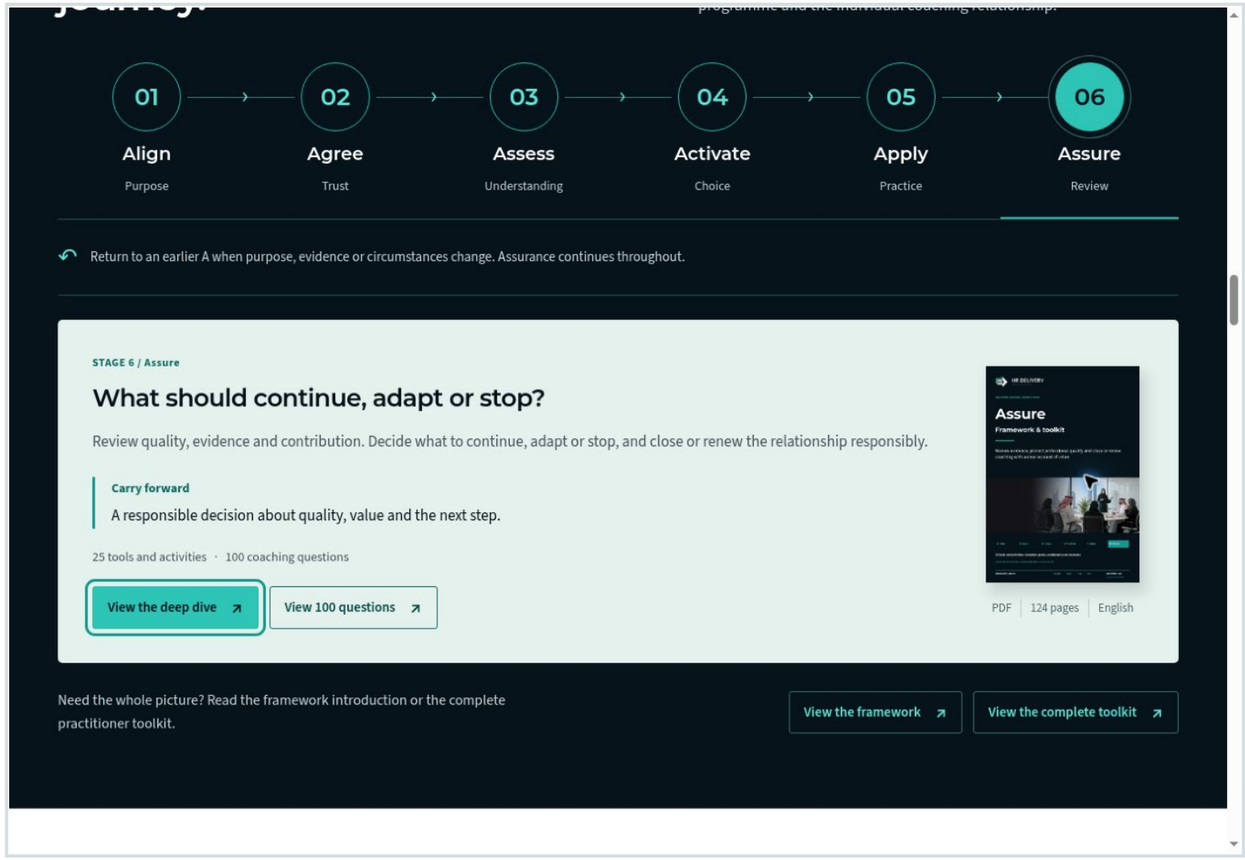
Connect coaching with a development programme

05 Review and adjust

Discuss what changed, what was learned and what support remains necessary. Update the development plan and next review point.

CHECK The programme produces a continuing route into workplace improvement.

CURRENT LIVE SCREEN



Current complete Assure stage panel, carry-forward and document links.

04 Explore Sami and check availability

Use the introduction and confirm the active service before planning a session.

02 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

EXPLORE SAMI AND CHECK AVAILABILITY / G-04-01

OPEN SOURCE

Explore the AI coaching introduction

Understand what Sami’s current interface does and how to reach support.

WHO USES THIS Prospective coaching user

BEFORE YOU BEGIN

- A public browser
- An understanding that this is an AI interface

WHAT YOU WILL HAVE

- Informed service choice
- Portal or reception enquiry

CHECK BEFORE YOU FINISH

- The AI character is a digital interface.
- Do not assume it sees assessment results automatically.
- Confirm active channels before entering sensitive coaching information.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The reviewed public page and portal sign-in describe a preview; live AI conversation and natural voice await connection.

EXPLORE SAMI AND CHECK AVAILABILITY / STEPS 1–2 OF 5

OPEN SOURCE

Explore the AI coaching introduction

01 Open Online AI Executive Coaching

Read the page introduction and current availability wording. The reviewed screen states that live AI conversation is not active yet.

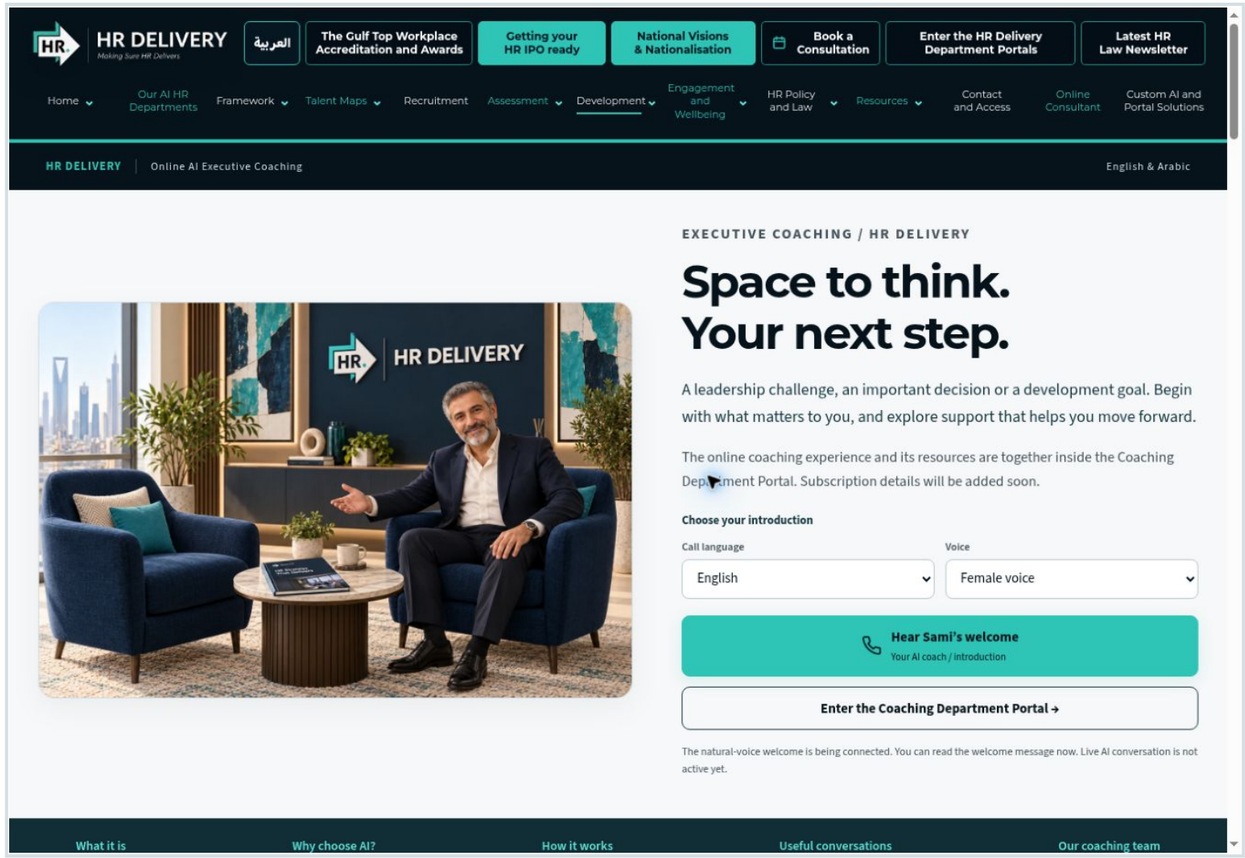
CHECK The preview is distinguished from an operational coaching conversation.

02 Choose the introduction preferences

Use 'Call language' to select English or Arabic and 'Voice' to choose the available voice preference.

CHECK The introduction preferences reflect the selection.

CURRENT LIVE SCREEN



Current introduction preferences: Call language, Voice, Hear Sami’s welcome and portal entry.

EXPLORE SAMI AND CHECK AVAILABILITY / STEPS 3–4 OF 5

OPEN SOURCE

Explore the AI coaching introduction

03 Open the welcome

Select 'Hear Sami’s welcome'. Read the complete welcome message in the introduction panel.

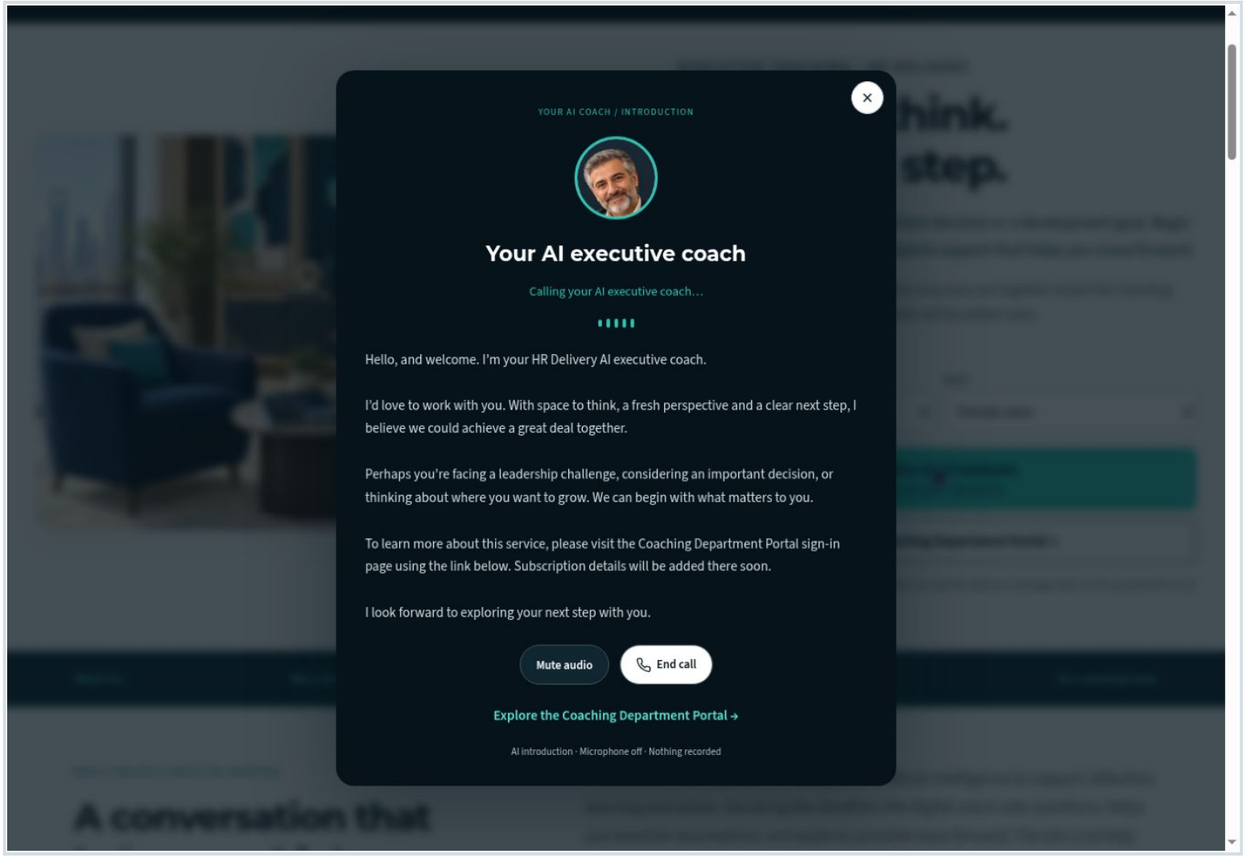
CHECK The panel identifies the AI introduction and says microphone off and nothing recorded.

04 Use the introduction controls

The panel offers 'Mute audio', 'End call' and 'Close'. The inspected state explains that natural-voice welcome is being connected; the written welcome is available.

CHECK You can leave the preview without treating it as a live coaching session.

CURRENT LIVE SCREEN



Current Sami welcome panel; AI introduction with microphone off and nothing recorded.

EXPLORE SAMI AND CHECK AVAILABILITY / STEPS 5–5 OF 5

OPEN SOURCE

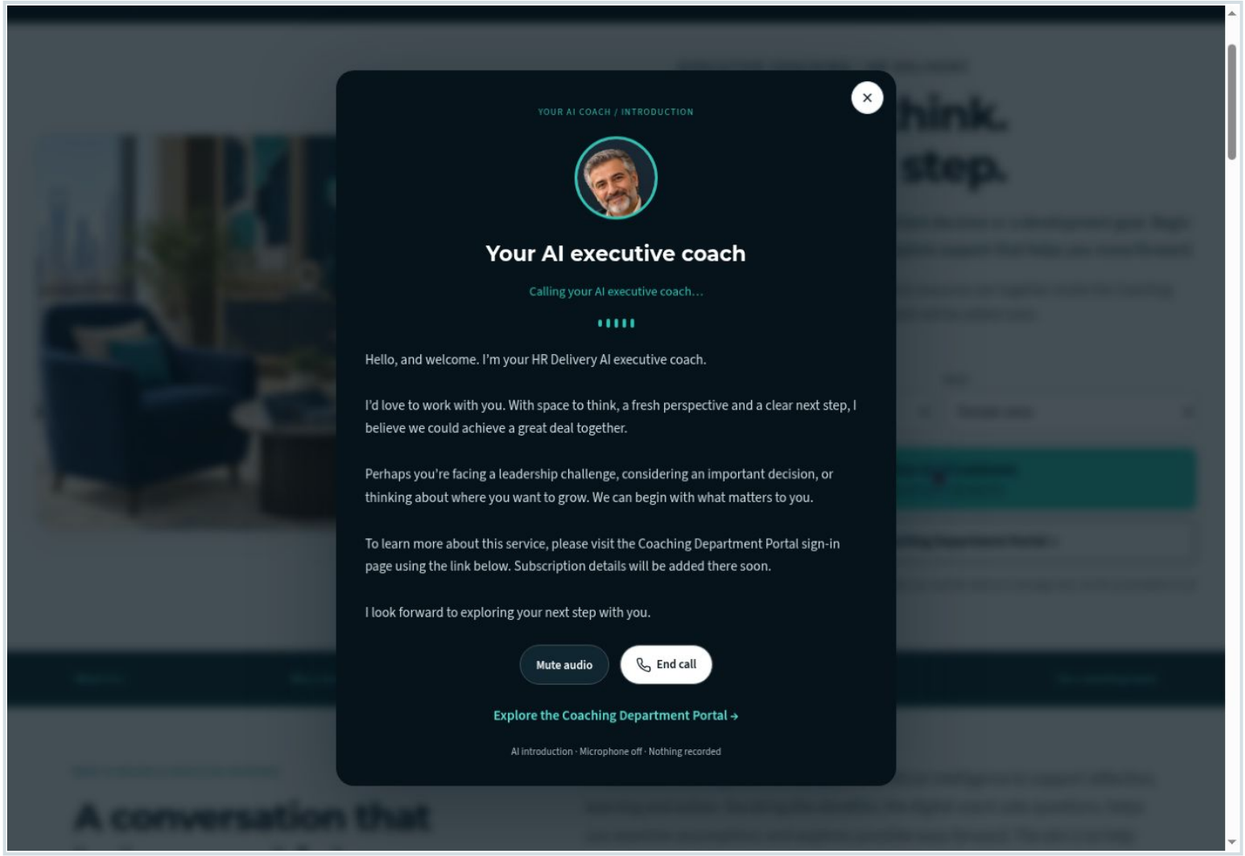
Explore the AI coaching introduction

05 Continue to the portal or Lama

Use 'Explore the Coaching Department Portal →' for the sign-in/subscription route, or contact Lama to confirm available support.

CHECK The next step is an access or service enquiry, not an assumed active AI conversation.

CURRENT LIVE SCREEN



Current Sami welcome panel; AI introduction with microphone off and nothing recorded.

EXPLORE SAMI AND CHECK AVAILABILITY / G-04-02

OPEN SOURCE

Use the booking route and prepare for a session

Turn an agreed coaching request into a confirmed and well-prepared appointment.

WHO USES THIS Coachee and reception team

BEFORE YOU BEGIN

- Agreed coaching format and scope
- Availability with a clear time zone

WHAT YOU WILL HAVE

- Confirmed appointment
- Session preparation note

CHECK BEFORE YOU FINISH

- Confirm date, time zone and coach.
- Automatic emails and calendar synchronisation should not be assumed without confirmation.

No confirmation or joining information arrives.	Check the request status with Lama using the appointment date and your name. Do not assume an automated email or external-calendar event has been sent.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected portal workflow. Public resources and official demonstrations support the route; private calendar and saved-session controls were not inspected.

EXPLORE SAMI AND CHECK AVAILABILITY / STEPS 1–2 OF 5

OPEN SOURCE

Use the booking route and prepare for a session

01 Confirm which service is being booked

Ask Lama whether the appointment is for a human coach, a service discussion or another agreed form of support. Do not infer availability from the presence of a calendar.

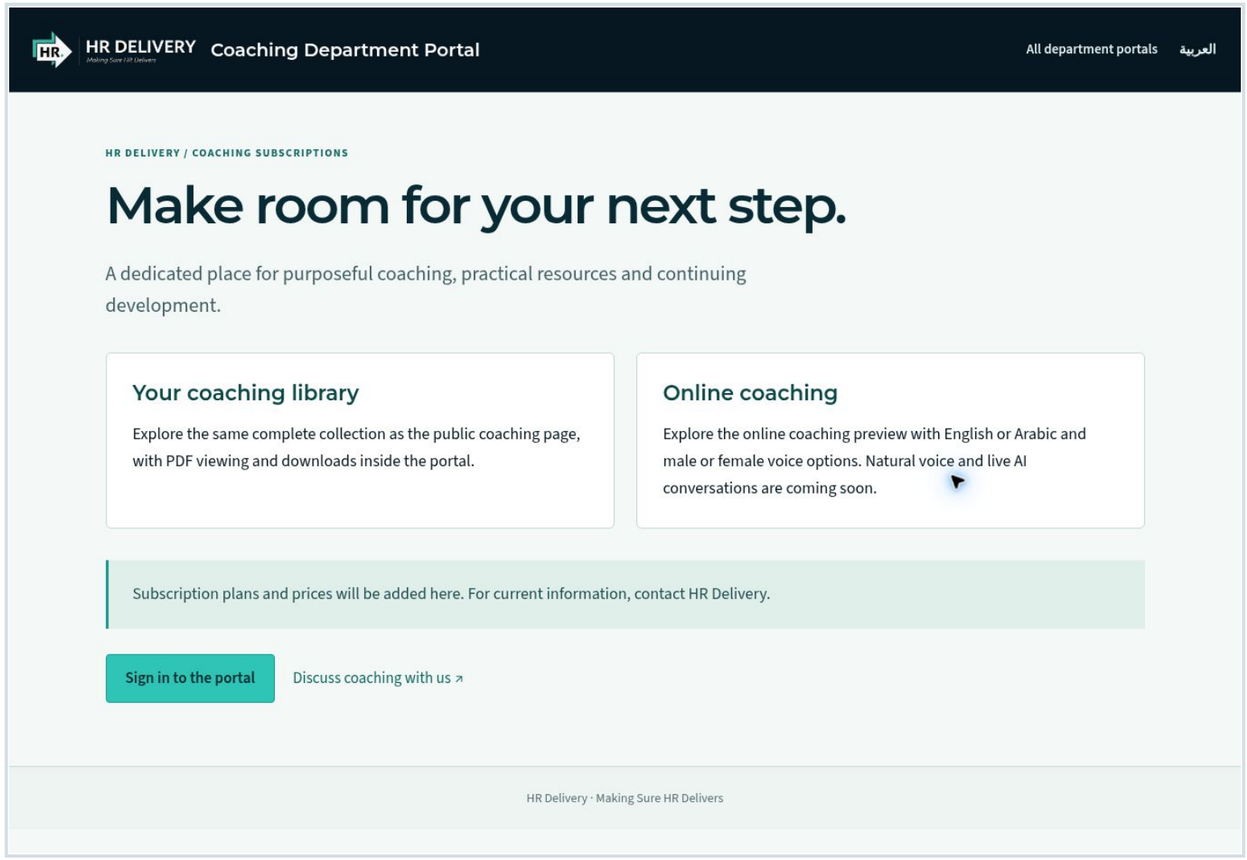
CHECK The requested appointment has an explicit purpose and provider.

02 Use the available booking interface

Follow the session-booking route offered in your authorised coaching workspace, or ask reception to arrange the session. Select only appropriate available times.

CHECK The request includes a date, time zone and intended session type.

PRIOR REVIEWED SCREEN



Previously reviewed coaching access and subscription route; private calendar controls were not inspected.

EXPLORE SAMI AND CHECK AVAILABILITY / STEPS 3–4 OF 5

OPEN SOURCE

Use the booking route and prepare for a session

03 Keep the enquiry concise

Provide the required contact information through the approved form and state the topic briefly. Leave detailed coaching or assessment records for the agreed secure route.

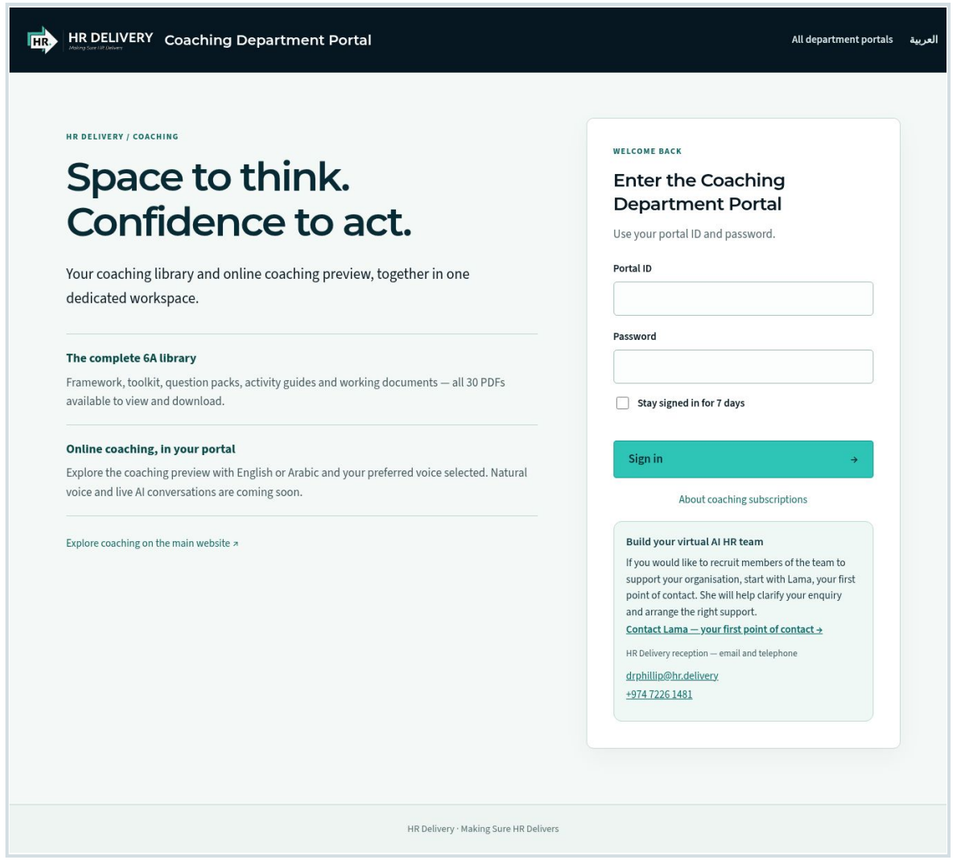
CHECK Reception has enough information to arrange the appointment.

04 Wait for confirmation

Check the appointment status and confirmed details. Clarify joining instructions, location, duration and cancellation arrangements before the session.

CHECK A request has become a confirmed appointment rather than an assumed booking.

CURRENT LIVE SCREEN



Current coaching entry route and reception contact information.

EXPLORE SAMI AND CHECK AVAILABILITY / STEPS 5–5 OF 5

OPEN SOURCE

Use the booking route and prepare for a session

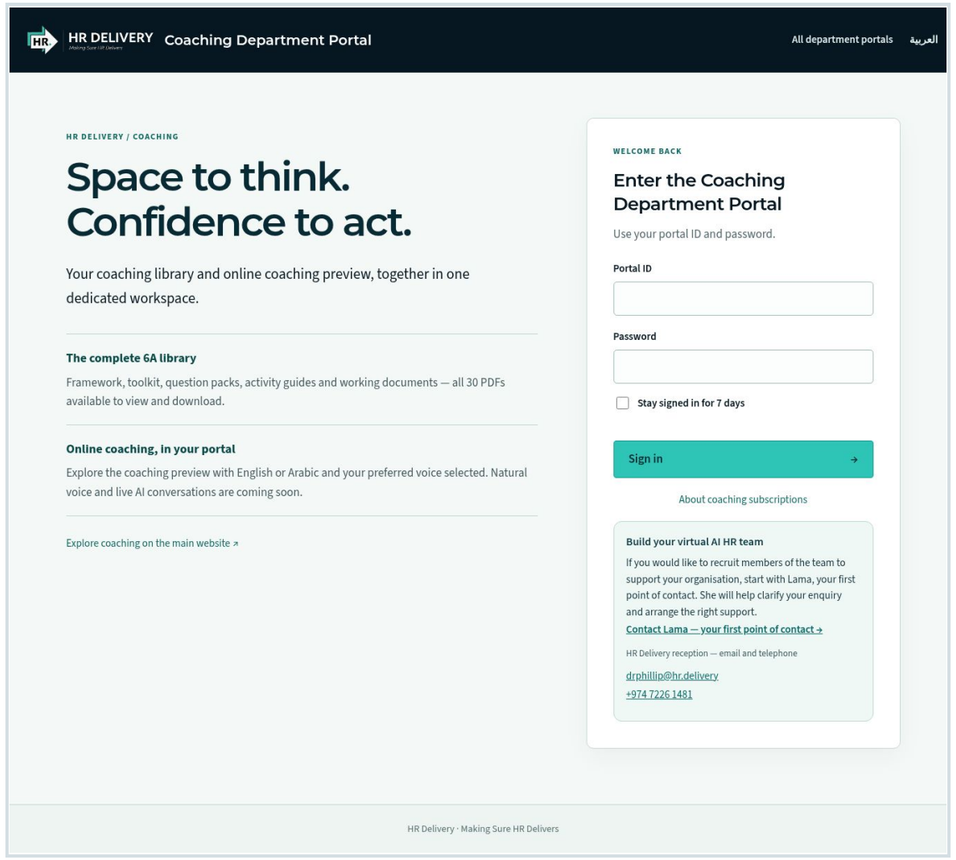
05

Prepare the conversation

Bring a goal, relevant work example and the appropriate resource or report. Review prior actions and note what would make the session useful.

CHECK Session time can focus on the work that matters.

CURRENT LIVE SCREEN



Current coaching entry route and reception contact information.

REFERENCE / 1 OF 1

OPEN SOURCE

The six 6A responsibilities

Stage	Question to resolve	Carry forward
Align	Is coaching the right response?	Purpose, charter and expected value
Agree	Are roles, rights and boundaries clear?	Trustworthy working arrangements
Assess	Is evidence sufficient and understood in context?	Goal and starting point
Activate	Does the conversation expand choices?	Insight, options and owned commitment
Apply	What will change in real work?	Workplace experiment and feedback
Assure	What should continue, adapt or stop?	Review and responsible next decision

REFERENCE / 1 OF 1

OPEN SOURCE

Choose the resource

Resource	Use
6A Coaching Framework	Understand the whole journey.
Executive Coaching Framework & Toolkit	Read practitioner guidance, tools and worked examples.
Question packs	Choose questions for the relevant stage.
Activity deep dives	Find an exercise by development purpose.
Activity directory and complete exercises	Locate a resource and its full guidance.
Supporting Documentation Pack for Coaches	Understand operational records and examples.
Coaching Operational Forms	Use the corresponding blank records.
Coachee and participant workbooks	Support reflection and practical activity.
Executive Coaching Workbook: PDF Reference	Read the companion worksheet prompts; calculations are not interactive.

QUICK REFERENCE

Your final check

- [ ] **01** The coaching purpose and suitability are clear.
- [ ] **02** Roles, confidentiality and sponsor reporting are agreed.
- [ ] **03** The selected resource matches the current stage and need.
- [ ] **04** The person owns the next step.
- [ ] **05** The action has an opportunity for practice and feedback.
- [ ] **06** The appointment and delivery format are confirmed.
- [ ] **07** Current AI availability is checked rather than assumed.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Contact Lama when you need access, a missing resource or help applying the executive coaching workflow. Describe the task and the point where you stopped. Include an error message or a screenshot with personal records hidden so the team can route the request accurately.

OPEN LAMA'S RECEPTION

drphillip@hr.delivery

INCLUDE IN YOUR REQUEST

- Your organisation and authorised role
- Portal and task name
- Page URL and exact error message
- A screenshot without passwords or personal records

REFERENCE NOTES

OPEN SOURCE

Guide scope and screen references

- The protected coaching portal and private calendar were not entered. Portal download controls are supported by an official published demonstration.
- Public 6A tabs, resource links, document-reader controls and the Sami welcome preview were inspected.
- The public AI page and current sign-in screen state that live AI conversations and natural-voice welcome are not yet connected.
- No coaching session was booked, no private notes accessed and no message sent during this review.

Screen key: Current live screen | Published demonstration | Prior reviewed screen