

# Additional Coaching exercises

## Action, productivity & balance

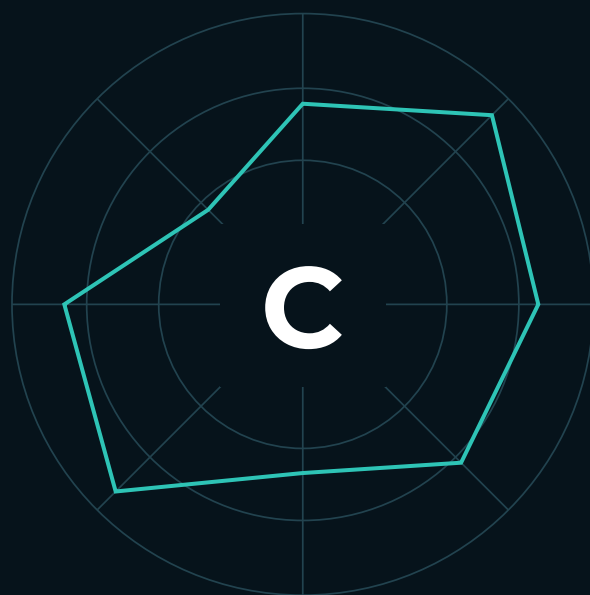
Turn intention into practice. Protect attention. Work more sustainably.

# 40

**activities and practice resources**

Coach guides, working pages,  
results and debriefs

**MASTER PAGES 206-328**



# Make change workable in everyday life

A good intention becomes useful when it has somewhere to happen, enough support and a way to be reviewed.

Many coaching conversations reach a moment when the client knows what they would like to do but is not yet doing it. The response should not automatically be another commitment or a more demanding target. This guide invites a closer look at the task, the working environment and the competing demands around the person.

The action and habit resources help make the next move specific. Break down the work, identify a realistic starting point and examine what interrupts progress. An experiment can be small without being trivial. It should be clear enough for the client to try and concrete enough for both of you to discuss afterwards.

The time and delegation resources turn attention towards choices about work. Which result deserves time in the calendar? What should be stopped, reduced or passed on? What does another person need in order to own a task properly? A diary is not evidence of available capacity simply because a space appears empty.

The balance, energy and relationship resources broaden the conversation beyond task completion. Invite the client to identify what restores them, what drains them and which requests have not been made clearly. Do not make sustainable working a private responsibility while leaving excessive workload, unclear authority or persistent relationship problems outside the discussion.

Use the wheels, matrices and logs as ways to make patterns visible. The shape on a page is not a diagnosis and one week of observations is not a permanent account of the client. Check the meaning behind each mark. Ask what the picture misses and whether the proposed change creates a cost elsewhere.

Finish with a decision that can survive contact with an ordinary working week. Agree the cue, the action, any support needed and the evidence to revisit. If the experiment does not work, treat that result as information about the design and the conditions rather than a verdict on motivation.

## THE PRACTITIONER'S STANDARD

**A workable next step must fit the life and the system around it.**

# Introduction

This guide combines the action, time-management and sustainable-working sections. Use it when the client wants to make progress on a specific commitment, regain control of attention, delegate more clearly, strengthen a relationship or reconsider the balance of demands and recovery. It is also useful between sessions as a record of what was attempted and learned.

01

## Create practical momentum

Turn a large or avoided task into a clear next step, a small habit or a testable barrier plan.

02

## Choose how attention is used

Review priorities, interruptions, workload and delegation rather than adding more tasks.

03

## Sustain the work

Consider energy, boundaries, relationships and the requests needed to make change realistic.

### A SUGGESTED STARTING ROUTE

|         |                                           |     |
|---------|-------------------------------------------|-----|
| ACE-F04 | Break the large task into workable pieces | 216 |
| ACE-G02 | Design a week that can actually work      | 244 |
| ACE-H04 | Identify what drains and restores energy  | 281 |
| ACE-F02 | The action and learning record            | 210 |

Choose the level of intervention deliberately. Some issues call for a personal experiment; others require a clearer request, a workload discussion, a change in authority or appropriate specialist support.

# Using this guide

Keep the coach guide, participant working page and debrief together.

## 01 / Select for the purpose

Agree what the client wants the conversation to enable. Read the whole activity, including its boundary notes and results page, before choosing it.

## 02 / Facilitate and record

Explain the task and offer an alternative. Use the original writing space, chart, wheel or map to capture the client's own observations.

## 03 / Debrief and test

Check the meaning of the record, choose a proportionate next step and agree what to review. An incomplete worksheet can still support a useful conversation.

## Participation and care

Invite the client to decline, pause or choose another approach. Do not require personal disclosure or use imagery to diagnose or treat distress.

## Evidence and ratings

Treat wheels and reflective scores as conversation aids, not selection tests. Separate what happened from what the client or coach inferred.

## Records and boundaries

Agree confidentiality and sponsor reporting. Use a client code where possible, approved storage and proportionate records. Use specialist support when the need exceeds coaching.

### FINDING A PAGE IN THE SPLIT EDITION

Original page numbers and ACE identifiers are retained. New opening pages use C-i, C-ii and so on. The original DIRECTORY footer now opens this guide's contents. Keep the six PDFs together for cross-guide links; support varies by reader. When a link does not open, use the suite map and retained master page number.

### RELATED MATERIALS IN THE SUITE

|                |                                            |            |
|----------------|--------------------------------------------|------------|
| <b>GUIDE A</b> | Coaching outcomes and evidence map         | <b>026</b> |
| <b>GUIDE D</b> | Review progress without performing success | <b>330</b> |
| <b>GUIDE F</b> | Self-care participant item sheet           | <b>530</b> |

# The six-guide suite

Choose a guide by the work you need to do. Volume letters A-F identify the six books; the ACE codes retain the letters used in the original activity sections.

## GUIDE / FOCUS

## MASTER PAGES

|          |                                                                                          |                |
|----------|------------------------------------------------------------------------------------------|----------------|
| <b>A</b> | <b>Purpose, values &amp; goals</b><br>27 activities and practice resources               | <b>001-107</b> |
| <b>B</b> | <b>Career, leadership &amp; confidence</b><br>32 activities and practice resources       | <b>108-205</b> |
| <b>C</b> | <b>Action, productivity &amp; balance</b><br>40 activities and practice resources        | <b>206-328</b> |
| <b>D</b> | <b>Review, workshops &amp; reflection</b><br>33 activities and practice resources        | <b>329-435</b> |
| <b>E</b> | <b>Coaching practice &amp; business owners</b><br>20 activities and practice resources   | <b>436-502</b> |
| <b>F</b> | <b>Programmes, questions &amp; reference</b><br>Shared programme and reference materials | <b>503-652</b> |

## ALL 652 MASTER PAGES ARE RETAINED

Every page from the revised master appears in one guide only. The original front matter is at the end of Guide A. Original page artwork, worksheets and wording are preserved; each volume adds its own opening pages and navigation.

# Contents

Click an entry to open it. Activity and resource numbers below are the retained master page references.

| ACTIVITY / RESOURCE                                            | PAGE       |
|----------------------------------------------------------------|------------|
| Foreword                                                       | C-ii       |
| Introduction                                                   | C-iii      |
| Using this guide                                               | C-iv       |
| The six-guide suite                                            | C-v        |
| <b>F / Action, habits and momentum</b>                         | <b>206</b> |
| ACE-F01      Generate actions before choosing                  | 207        |
| ACE-F02      The action and learning record                    | 210        |
| ACE-F03      Design a small daily habit                        | 213        |
| ACE-F04      Break the large task into workable pieces         | 216        |
| ACE-F05      Understand and interrupt procrastination          | 219        |
| ACE-F06      Take stock and choose a response                  | 222        |
| ACE-F07      A small move out of stuckness                     | 225        |
| ACE-F08      Language that supports chosen action              | 228        |
| ACE-F09      Build the next part of the bridge                 | 231        |
| ACE-F10      Resolve the tolerations that consume attention    | 234        |
| ACE-F11      From excuse language to a barrier plan            | 237        |
| <b>G / Time, priorities and delegation</b>                     | <b>240</b> |
| ACE-G01      Find the priority that deserves today             | 241        |
| ACE-G02      Design a week that can actually work              | 244        |
| ACE-G03      Choose actions by impact and effort               | 247        |
| ACE-G04      Put the important work into the calendar          | 250        |
| ACE-G05      See where attention really goes                   | 253        |
| ACE-G06      Reduce interruptions without becoming unavailable | 256        |

# Contents / 02

Click an entry to open it. Activity and resource numbers below are the retained master page references.

| ACTIVITY / RESOURCE                          |                                                       | PAGE       |
|----------------------------------------------|-------------------------------------------------------|------------|
| ACE-G07                                      | One weekly plan, one daily next step                  | 259        |
| ACE-G08                                      | Choose what to stop, reduce or refuse                 | 262        |
| ACE-G09                                      | Distinguish urgency from importance                   | 265        |
| ACE-G10                                      | Delegate a result, not a vague task                   | 268        |
| <b>H / Energy, balance and relationships</b> |                                                       | <b>271</b> |
| ACE-H01                                      | The whole-life balance wheel                          | 272        |
| ACE-H02                                      | Say no while protecting the relationship              | 275        |
| ACE-H03                                      | Review relationship patterns without labelling people | 278        |
| ACE-H04                                      | Identify what drains and restores energy              | 281        |
| ACE-H05                                      | Turn unmet needs into practical requests              | 284        |
| ACE-H06                                      | A sustainable self-care practices review              | 287        |
| ACE-H07                                      | Map the people who help you move forward              | 290        |
| ACE-H08                                      | Redesign the work you enjoy and endure                | 293        |
| ACE-H09                                      | Build a wheel for the question you actually have      | 296        |
| ACE-H10                                      | A diary of what was worth noticing                    | 299        |
| ACE-H11                                      | Make room for what brings you alive                   | 302        |
| ACE-H12                                      | Create opportunities for genuine friendship           | 305        |
| ACE-H13                                      | Strengthen a working relationship deliberately        | 308        |
| ACE-H14                                      | Restore useful energy at work                         | 311        |
| ACE-H15                                      | Add one source of brightness to an ordinary week      | 314        |
| ACE-H16                                      | Kindness as a series of chosen actions                | 317        |
| ACE-H17                                      | Plan a season you will be glad to have lived          | 320        |
| ACE-H18                                      | Notice strain and choose the right response           | 323        |
| ACE-H19                                      | Five specific things to appreciate                    | 326        |

# F

## Action, habits and momentum

### ACTIVATE / APPLY

Make progress small enough to start and meaningful enough to continue.

## 11

### ACTIVITIES AND PRACTICE RESOURCES

Coach guide → Participant working page → Results and debrief  
Select the tool that fits the purpose. Adapt it with the client.

A clear conclusion. A proportionate next step. Evidence worth reviewing.

# Generate actions before choosing

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

## PURPOSE AND INTRODUCTION

This action-brainstorming exercise separates generating possibilities from selecting a commitment. It is useful when a client sees only one difficult route or keeps discussing a problem without identifying a practical move. The final choice should be relevant, safe and owned by the client.

## FACILITATION SEQUENCE

- 1** Define the desired change and the situation in which it matters.
- 2** Generate possible actions under start, stop, continue and change, without judging the first ideas.
- 3** Add options involving support, information or system changes rather than only personal effort.
- 4** Select one action for likely usefulness, feasibility and learning value.
- 5** Specify the first step, support and review evidence.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Check authority, stakeholder impact and workload before committing.

# Generate actions before choosing

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Start

---

---

---

---

---

---

---

---

## Stop

---

---

---

---

---

---

---

---

## Continue

---

---

---

---

---

---

---

---

## Change

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Generate actions before choosing

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

## INTERPRET THE RESULT CAREFULLY

Brainstorming produces options, not obligations.

An action can be a conversation, observation or request, not only a task.

Choose fewer actions than the client could theoretically complete.

## DEBRIEF QUESTIONS

- 01** Which option changes the situation rather than only your effort?
- 02** What could you ask for instead of doing alone?
- 03** Which small action would teach you most?
- 04** What will you deliberately not attempt yet?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager generates ways to improve meeting decisions. She selects a simple decision log and stops reopening agreed points without new evidence.

## A NEXT-STEP EXPERIMENT

Try one action in two relevant situations and review its usefulness before adding another.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R19](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: W09, E29, FE03, FW01, IG08

# The action and learning record

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

## PURPOSE AND INTRODUCTION

This record connects commitments with evidence and learning. It avoids reducing coaching follow-through to a ticked to-do list. A missed action should be reviewed for relevance, feasibility and barriers; a completed action should be reviewed for what it changed.

## FACILITATION SEQUENCE

- 1** Write one action in observable terms and connect it to the coaching outcome.
- 2** Specify the cue, date, support and evidence that will show the attempt occurred.
- 3** Record what actually happened, including partial attempts or changes to the plan.
- 4** Compare intention with outcome and identify what was learned.
- 5** Decide to repeat, adapt, stop or seek support, and record the next review.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

The record belongs within the agreed coaching confidentiality boundary.

# The action and learning record

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

Client code: \_\_\_\_\_ Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

| Date / situation | What happened | Evidence / learning |
|------------------|---------------|---------------------|
|                  |               |                     |
|                  |               |                     |
|                  |               |                     |
|                  |               |                     |
|                  |               |                     |

**What I notice from the completed activity**  

---

---

**What I need to check or understand better**  

---

---

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

---

# The action and learning record

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

## INTERPRET THE RESULT CAREFULLY

Completion is not the same as effectiveness.

Do not label a missed action as lack of commitment without understanding the barrier.

A decision to stop an unhelpful action can be a successful learning outcome.

## DEBRIEF QUESTIONS

- 01** What did you learn that the original plan did not anticipate?
- 02** Did completing the action produce the intended benefit?
- 03** What explains any gap between plan and attempt?
- 04** What should change in the next version?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader completes a new check-in routine but finds it duplicates an existing meeting. She adapts the existing meeting rather than adding more process.

## A NEXT-STEP EXPERIMENT

Use one record for the next experiment and bring evidence, not only a completion status, to the review.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R04](#) [R03](#) • Conceptual support; this original activity is not independently validated.

Inventory references: W10, E05, Q21, FA01, SP03, SP11

# Design a small daily habit

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

## PURPOSE AND INTRODUCTION

This exercise creates a repeatable behaviour linked to a stable cue. It is useful when a client wants a change to become easier to initiate. The initial behaviour should be small enough to perform under ordinary conditions, with a recovery plan for missed opportunities. There is no fixed-day promise of habit formation.

## FACILITATION SEQUENCE

- 1** Choose one behaviour that supports a meaningful goal and make it small and observable.
- 2** Attach it to a stable cue in an existing routine.
- 3** Reduce friction by preparing the environment or materials.
- 4** Track opportunities and attempts for fourteen days without treating a missed day as failure.
- 5** Review what helps repetition and adjust the cue or behaviour before expanding.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

Do not apply habit coaching to medication, substance use or clinical conditions without appropriate professional involvement.

# Design a small daily habit

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

**When / where the cue occurs**

\_\_\_\_\_  
\_\_\_\_\_

**Small observable behaviour**

\_\_\_\_\_  
\_\_\_\_\_

FOURTEEN OPPORTUNITIES — MARK ATTEMPTED, MISSED OR NOT AVAILABLE

|            |            |             |             |             |             |             |
|------------|------------|-------------|-------------|-------------|-------------|-------------|
| 1<br>_____ | 2<br>_____ | 3<br>_____  | 4<br>_____  | 5<br>_____  | 6<br>_____  | 7<br>_____  |
| 8<br>_____ | 9<br>_____ | 10<br>_____ | 11<br>_____ | 12<br>_____ | 13<br>_____ | 14<br>_____ |

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

**What I notice from the completed activity**

\_\_\_\_\_  
\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_

# Design a small daily habit

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

## INTERPRET THE RESULT CAREFULLY

Repetition in context matters more than a dramatic initial effort.

Do not use a streak as a measure of personal worth.

An unsuitable cue or unrealistic behaviour should be redesigned rather than defended.

## DEBRIEF QUESTIONS

- 01** What will reliably remind you to act?
- 02** What is the smallest useful version?
- 03** What makes the behaviour difficult on an ordinary busy day?
- 04** How will you resume after a missed opportunity?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

After closing the final meeting of the day, a manager writes tomorrow's most important decision on a card. The minimum version is one sentence, not a full planning session.

## A NEXT-STEP EXPERIMENT

Track fourteen opportunities, recording attempts and the main barrier when an opportunity is missed.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R06](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L01, S02, E38, Q14, R04

# Break the large task into workable pieces

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

## PURPOSE AND INTRODUCTION

A large task often feels impossible because it contains several different decisions and actions. This decomposition exercise creates a visible sequence of manageable pieces. It uses a work-breakdown approach rather than reproducing the inventoried animal metaphor.

## FACILITATION SEQUENCE

- 1** Name the deliverable and define what “done” would mean.
- 2** Divide it into four to seven meaningful components.
- 3** For each component, identify the next observable action, dependency and decision owner.
- 4** Sequence the first few actions and identify what can proceed in parallel.
- 5** Choose a short starting block and a review point before planning every detail.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

|                                      |                                           |                                           |
|--------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Client purpose</b><br><hr/> <hr/> | <b>Adaptation / access</b><br><hr/> <hr/> | <b>Evidence to revisit</b><br><hr/> <hr/> |
|--------------------------------------|-------------------------------------------|-------------------------------------------|

## BOUNDARY AND CARE

For complex delivery, align with the organisation's project and risk-management processes.

# Break the large task into workable pieces

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

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

|                                                                    |                                                                    |
|--------------------------------------------------------------------|--------------------------------------------------------------------|
| <b>What I notice from the completed activity</b><br>_____<br>_____ | <b>What I need to check or understand better</b><br>_____<br>_____ |
|--------------------------------------------------------------------|--------------------------------------------------------------------|

|                                                                       |
|-----------------------------------------------------------------------|
| <b>My next step / evidence I will look for / review date</b><br>_____ |
|-----------------------------------------------------------------------|

# Break the large task into workable pieces

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

## INTERPRET THE RESULT CAREFULLY

Breaking down work does not create extra capacity; check total demand.

A component may need a decision before it needs effort.

Avoid planning at a level of detail that becomes another form of avoidance.

## DEBRIEF QUESTIONS

- 01** Which part is unclear rather than large?
- 02** What must happen before something else can start?
- 03** What can be delegated or supported?
- 04** What is the smallest piece that creates useful progress?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive facing a board paper separates the decision question, evidence collection, options, recommendation and review. The first action is to agree the decision question with the sponsor.

## A NEXT-STEP EXPERIMENT

Complete the first work block and update the breakdown using what you learned.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L02

# Understand and interrupt procrastination

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

## PURPOSE AND INTRODUCTION

This exercise treats delay as a behaviour to understand rather than a character flaw. It examines task clarity, value, discomfort, skill, capacity and environment. The goal is to decide whether the task should be done, changed, delegated or stopped, then make a realistic start.

## FACILITATION SEQUENCE

- 1** Choose one delayed task and confirm that it is still necessary and yours to do.
- 2** Describe when delay occurs and what you do instead.
- 3** Explore possible causes: unclear next step, low value, fear of evaluation, missing skill, overload or competing priorities.
- 4** Change one relevant condition and define a ten-minute starting action.
- 5** Attempt the start and review what the experience reveals about the barrier.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not use shame, punishment or labels such as lazy to drive action.

# Understand and interrupt procrastination

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## What I intended

---

---

---

---

---

---

---

---

## What got in the way

---

---

---

---

---

---

---

---

## What I can change or request

---

---

---

---

---

---

---

---

## The revised experiment

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Understand and interrupt procrastination

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

## INTERPRET THE RESULT CAREFULLY

Delay can be a rational response to conflicting demands.

A small start is a test, not a cure for every form of procrastination.

Repeated difficulty may require support beyond a productivity technique.

## DEBRIEF QUESTIONS

- 01** Is this a task problem, a capacity problem or an emotional barrier?
- 02** What are you protecting by delaying?
- 03** What would make starting easier without pretending the task is enjoyable?
- 04** Should the task be changed or stopped?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager delays a difficult feedback conversation because the examples are vague. She spends ten minutes organising evidence and seeks a rehearsal, rather than simply booking a more forceful deadline.

## A NEXT-STEP EXPERIMENT

Complete one short starting block and record whether clarity, confidence or capacity changed.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R18](#) [R04](#) [R15](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L05, S06

# Take stock and choose a response

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

## PURPOSE AND INTRODUCTION

This fast review helps a client distinguish what is working, what is frustrating and what they want to change now. It is useful between deeper coaching exercises or when the agenda feels diffuse. The output is a small set of insights connected to practical responses.

## FACILITATION SEQUENCE

- 1** Write what is working and what is creating friction in the current situation.
- 2** Identify what you want more of, less of or differently.
- 3** Extract up to three useful observations, keeping facts and interpretations distinct.
- 4** Choose one response for each observation: preserve, change, investigate or ask for help.
- 5** Select the first response and define a review point.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Escalate material system or safety issues through appropriate channels rather than containing them within private coaching.

# Take stock and choose a response

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Working: retain

---

---

---

---

---

---

---

---

## Not working: change

---

---

---

---

---

---

---

---

## Missing: create

---

---

---

---

---

---

---

---

## Unnecessary: stop

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Take stock and choose a response

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

## INTERPRET THE RESULT CAREFULLY

Not every frustration needs immediate correction.

A useful stocktake includes strengths and resources, not only problems.

Limit actions so that the review produces focus rather than another long list.

## DEBRIEF QUESTIONS

**01** What should be preserved while you change other things?

**02** What is a symptom rather than a cause?

**03** Which observation is most actionable?

**04** What needs investigation before action?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader sees that team commitment is strong but priorities change too often. She preserves the team's initiative while introducing a clearer weekly priority decision.

## A NEXT-STEP EXPERIMENT

Take the first response and review whether it addresses the issue you intended.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R19](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L06, S07, R09

# A small move out of stuckness

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

## PURPOSE AND INTRODUCTION

When a client cannot see a complete route, a small information-rich move may be more useful than another attempt to solve everything mentally. This exercise identifies available resources, exceptions and reversible actions. It does not require optimism or certainty before progress begins.

## FACILITATION SEQUENCE

- 1** Describe the stuck point as a specific situation rather than a global identity.
- 2** Identify what is already possible, what has helped before and who could contribute.
- 3** Generate several small moves, including observation, clarification, conversation and practical action.
- 4** Choose the move with manageable risk and useful learning value.
- 5** Define what you will notice and how you will decide the following step.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not imply that all situations can be solved through individual initiative.

# A small move out of stuckness

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

```

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

**Starting point**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Next useful step**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Evidence / milestone**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Review / decision**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

# A small move out of stuckness

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

## INTERPRET THE RESULT CAREFULLY

The purpose is movement with learning, not forced positivity.

A small move should not bypass an important safety or governance decision.

If no safe move is available, seeking support can be the next step.

## DEBRIEF QUESTIONS

- 01** What is not completely stuck?
- 02** When has the situation been slightly easier?
- 03** What could you learn before solving the whole problem?
- 04** Which move is small enough to take now?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director cannot resolve a cross-functional dispute alone. She arranges a short conversation to agree the decision that actually needs to be made, creating a starting point for further work.

## A NEXT-STEP EXPERIMENT

Take the selected move within a week and record what changed in your understanding.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R19](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L07

# Language that supports chosen action

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

## PURPOSE AND INTRODUCTION

The words a client uses about a task can reveal pressure, choice, uncertainty or resentment. This exercise experiments with more accurate and agency-supportive language. It is not based on a claim that particular words reprogramme the mind, and it does not replace action on real constraints.

## FACILITATION SEQUENCE

- 1** Write a sentence you commonly use about a difficult task.
- 2** Notice what the wording implies about choice, obligation and capability.
- 3** Create two alternative sentences that remain truthful rather than artificially positive.
- 4** Read each and identify which supports a useful next action.
- 5** Test the preferred wording alongside a practical change to the task or plan.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not claim neurological or therapeutic effects from word substitution.

# Language that supports chosen action

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Situation / observable evidence

---

---

---

---

---

---

---

---

## Interpretation / assumption

---

---

---

---

---

---

---

---

## Alternative view / uncertainty

---

---

---

---

---

---

---

---

## Chosen response / test

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Language that supports chosen action

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

## INTERPRET THE RESULT CAREFULLY

Language can support reflection but cannot remove an external constraint.

Avoid replacing a legitimate “cannot” with an unrealistic affirmation.

The test is whether the wording supports clearer choice and behaviour.

## DEBRIEF QUESTIONS

- 01** Which part of the sentence removes choice that you actually have?
- 02** What obligation is real and should remain visible?
- 03** What wording feels accurate rather than motivational theatre?
- 04** What action changes alongside the words?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

“I have to fix everyone’s problems” becomes “I am responsible for helping the team resolve issues, not for personally solving each one.” The leader pairs the sentence with a delegation question.

## A NEXT-STEP EXPERIMENT

Use the new sentence before three relevant tasks and note whether it changes the action you take.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R18](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T04

# Build the next part of the bridge

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

## PURPOSE AND INTRODUCTION

This original bridge metaphor helps a client act when the whole route is not yet visible. One bank represents the current situation and the other a desired direction. The bridge is built from immediate actions, support and learning, not from certainty about every future step.

## FACILITATION SEQUENCE

- 1** Describe the current bank and the desired direction on the opposite bank.
- 2** Name the main gap and the constraints that cannot be wished away.
- 3** Place the first three possible steps between the banks, including an information-gathering step where needed.
- 4** Add supports beneath the steps: people, authority, resources and safeguards.
- 5** Choose the first step and decide what must be learned before placing the next one.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

For high-risk decisions, obtain appropriate expertise before acting.

# Build the next part of the bridge

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

|                                                                                        |                                                                                                                                                                                                             |                                                                                        |
|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <b>Current position</b><br><hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> | <div data-bbox="544 694 1051 862"> <b>Step 1</b><br/> <hr/> </div> <div data-bbox="544 896 1051 1064"> <b>Step 2</b><br/> <hr/> </div> <div data-bbox="544 1097 1051 1261"> <b>Step 3</b><br/> <hr/> </div> | <b>Desired position</b><br><hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> |
|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|

## Supports, risks and missing pieces

|                                                                 |                                                                 |
|-----------------------------------------------------------------|-----------------------------------------------------------------|
| <b>What I notice from the completed activity</b><br><hr/> <hr/> | <b>What I need to check or understand better</b><br><hr/> <hr/> |
|-----------------------------------------------------------------|-----------------------------------------------------------------|

|                                                                       |
|-----------------------------------------------------------------------|
| <b>My next step / evidence I will look for / review date</b><br><hr/> |
|-----------------------------------------------------------------------|

# Build the next part of the bridge

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

## INTERPRET THE RESULT CAREFULLY

The metaphor does not mean any action is better than no action.

A step should create useful progress or information.

Do not draw a complete bridge merely to make uncertainty disappear visually.

## DEBRIEF QUESTIONS

- 01** What must be known before the next step is safe?
- 02** What support is missing beneath the plan?
- 03** Which step is reversible?
- 04** What would tell you to change the direction?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader exploring a new operating model first clarifies the problem, then interviews two stakeholders, then tests one decision-right change before proposing a full redesign.

## A NEXT-STEP EXPERIMENT

Complete the first step and redraw the next two in light of what you learn.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R19](#) [R21](#) • Conceptual support; this original activity is not independently validated.

Inventory references: M03

# Resolve the tolerations that consume attention

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

## PURPOSE AND INTRODUCTION

Tolerations are recurring small irritations, unfinished decisions or avoidable frictions that consume attention. This exercise distinguishes low-cost fixes from deeper issues requiring negotiation or system change. It avoids assuming that every frustration should be eliminated or that the client controls all causes.

## FACILITATION SEQUENCE

- 1** List recurring irritations and unfinished matters in work and daily life.
- 2** Group them into practical fixes, decisions, conversations and structural issues.
- 3** Estimate the attention cost and effort required without false numerical precision.
- 4** Choose one low-risk fix and one issue that needs a request or decision.
- 5** Record what changes after action and whether another underlying issue becomes visible.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not frame other people themselves as tolerations; describe behaviours, arrangements or conditions.

# Resolve the tolerations that consume attention

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Keep / continue

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## Change / simplify

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## Stop / resolve

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Resolve the tolerations that consume attention

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

## INTERPRET THE RESULT CAREFULLY

A toleration list is not a mandate to optimise every detail of life.

Some irritations signal a role or process problem that deserves wider attention.

Choose a few meaningful items rather than creating a second source of overwhelm.

## DEBRIEF QUESTIONS

- 01** Which issue returns because nobody has made a decision?
- 02** What are you tolerating for a legitimate reason?
- 03** What small fix would release useful attention?
- 04** Which issue is too structural for a private workaround?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director repeatedly searches for inconsistent project updates. Instead of tidying her own inbox indefinitely, she agrees a common update location and ownership rule with the team.

## A NEXT-STEP EXPERIMENT

Resolve one practical item and make one structural request, then review the attention saved.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R14](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E37, Q30, FE05, FE11

# From excuse language to a barrier plan

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

## PURPOSE AND INTRODUCTION

This exercise supports accountability without shame. It examines the explanation for an uncompleted commitment and distinguishes a genuine constraint, an outdated goal, an avoidable pattern and a need for support. The aim is a more realistic next agreement, not a confrontation about character.

## FACILITATION SEQUENCE

- 1** Choose one commitment that was not completed and describe what actually happened.
- 2** Write the explanation without judging it, then identify evidence for each part.
- 3** Separate factors within your control from conditions requiring help or renegotiation.
- 4** Decide whether to retain, change or stop the commitment.
- 5** Make a new agreement that addresses the main barrier and includes a review point.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Avoid accusatory labels and do not dismiss disability, care responsibilities or structural constraints as excuses.

# From excuse language to a barrier plan

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## What I intended

---

---

---

---

---

---

---

---

## What got in the way

---

---

---

---

---

---

---

---

## What I can change or request

---

---

---

---

---

---

---

---

## The revised experiment

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# From excuse language to a barrier plan

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

## INTERPRET THE RESULT CAREFULLY

Accountability requires accurate explanation, not forced self-blame.

A changed goal may be appropriate; record the reason rather than quietly abandoning it.

Repeated barriers should change the design of the plan.

## DEBRIEF QUESTIONS

- 01** What part of the explanation is a fact?
- 02** What part is a pattern you could change?
- 03** Does the commitment still matter?
- 04** What would make the next agreement more honest?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A manager misses three development actions because urgent work repeatedly displaces them. He negotiates protected practice time and reduces the action to one relevant work behaviour.

## A NEXT-STEP EXPERIMENT

Test the revised agreement once and review the barrier explicitly, whether or not the action succeeds.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R18](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E41



# Time, priorities and delegation

## APPLY

Allocate attention deliberately and change the systems that consume it.

## 10

### ACTIVITIES AND PRACTICE RESOURCES

Coach guide → Participant working page → Results and debrief  
Select the tool that fits the purpose. Adapt it with the client.

A clear conclusion. A proportionate next step. Evidence worth reviewing.

# Find the priority that deserves today

APPLY • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

A short prioritisation conversation is useful when an executive is carrying too many competing concerns. The exercise distinguishes what feels loud from what matters, and chooses a proportionate next move. Use it at the start of a session or when the client needs to regain direction between meetings.

## FACILITATION SEQUENCE

- 1** Spend one minute listing the five concerns most present in your attention.
- 2** For each concern, write the consequence of doing nothing for one week.
- 3** Mark the concern most connected to an agreed responsibility or personally chosen value.
- 4** Choose one action that fits the time and authority available today.
- 5** Name what will deliberately wait, and tell anyone affected by that choice.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not apply a five-minute shortcut to safety-critical, legal or otherwise consequential decisions requiring fuller analysis.

# Find the priority that deserves today

APPLY • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Start broadly

\_\_\_\_\_

## Choose what matters

\_\_\_\_\_

## Make the trade-off explicit

\_\_\_\_\_

## Retain the priority

\_\_\_\_\_

## What I notice from the completed activity

\_\_\_\_\_  
\_\_\_\_\_

## What I need to check or understand better

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_

# Find the priority that deserves today

APPLY • ABOUT 10 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

One priority does not remove the others; it makes the immediate allocation of attention explicit.

Urgency requires a real deadline or consequence, not merely a strong feeling.

Revisit the decision when new information materially changes the consequences.

## DEBRIEF QUESTIONS

- 01** Which concern is loud rather than important?
- 02** What consequence makes this a priority?
- 03** What would happen if you did less elsewhere?
- 04** Who needs to understand the trade-off?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A chief people officer chooses to clarify a sensitive decision before polishing a presentation, because the unresolved decision is delaying five colleagues.

## A NEXT-STEP EXPERIMENT

Protect a short period for the chosen action today and record what changed.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: W08, E45, SP07

# Design a week that can actually work

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

Weekly planning connects intended results with real capacity. Rather than producing an idealised list, the client makes time for commitments, focused work, necessary coordination and recovery. The output is a realistic weekly experiment that can be reviewed against what happened.

## FACILITATION SEQUENCE

- 1** List the fixed commitments and realistic working capacity for the coming week.
- 2** Choose no more than three meaningful outcomes and define what finished would look like.
- 3** Place the most attention-demanding work in suitable periods, allowing for travel, handovers and interruptions.
- 4** Reserve a realistic contingency margin based on recent experience rather than filling every space.
- 5** Agree a brief end-of-week review of outcomes, workload and one planning improvement.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Build around the client's actual work arrangements, accessibility needs and care responsibilities.

**APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

Date: \_\_\_\_\_

Focus / question / goal: \_\_\_\_\_

# Design a week that can actually work

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

A full calendar is not evidence of a useful week.

An unfinished outcome may reflect unrealistic allocation or dependency, not insufficient commitment.

Compare planned and actual capacity before adding more priorities.

## DEBRIEF QUESTIONS

- 01** What are you assuming about your capacity?
- 02** Which outcome would make the week worthwhile?
- 03** Where could a handover reduce overload?
- 04** What pattern from last week should change this plan?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A regional director reduces five planned initiatives to two deliverables and a key relationship conversation after allowing for site travel and an unpredictable operational issue.

## A NEXT-STEP EXPERIMENT

Test the plan for one week; record the largest difference between planned and actual work.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R04](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L08

# Choose actions by impact and effort

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This matrix helps a client compare possible actions before investing time. It is a decision aid, not a mathematically precise ranking. Impact must be defined in relation to a chosen outcome, while effort should include coordination, emotional demand and opportunity cost as well as hours.

## FACILITATION SEQUENCE

- 1** Define the outcome and the period over which impact will be judged.
- 2** List six to ten possible actions and estimate relative impact and effort on a 0–10 scale.
- 3** Plot each action, writing a short evidence note for uncertain estimates.
- 4** Compare high-impact feasible actions with demanding actions that need resources or sequencing.
- 5** Select one action, state the trade-off and name the information that could change the choice.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not use impact/effort to bypass non-negotiable duties or treat people's wellbeing as a discretionary benefit.

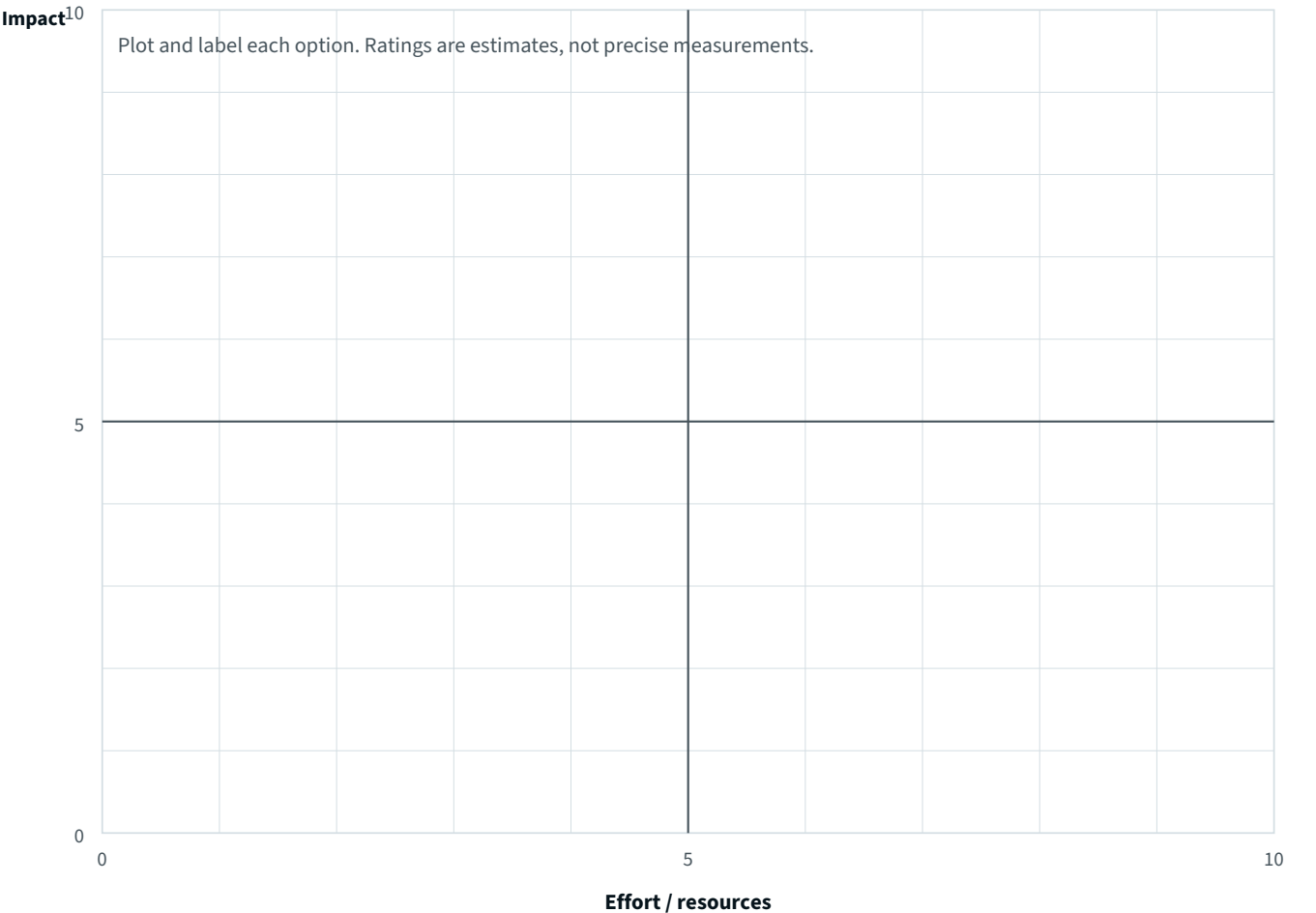
# Choose actions by impact and effort

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_ Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_



**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

# Choose actions by impact and effort

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The coordinates are estimates, not measurement precision.

A low-effort action is not automatically worthwhile if it does not serve the chosen outcome.

Safety, fairness and mandatory obligations can override the matrix.

## DEBRIEF QUESTIONS

- 01** What does impact mean in this decision?
- 02** Which estimate rests on the weakest evidence?
- 03** What apparently easy action has a hidden cost?
- 04** Which option could be redesigned rather than rejected?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A service director prioritises clarifying an approval rule over buying a new reporting tool because the rule change is more likely to remove the observed delay.

## A NEXT-STEP EXPERIMENT

Take one selected action and compare its actual effort and contribution with your estimates.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R19](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T01, E35, Q02

# Put the important work into the calendar

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

The familiar big-rocks metaphor becomes useful only when translated into actual capacity decisions. Here the client identifies a few important commitments, allocates them first and explicitly negotiates the smaller work around them. The exercise reveals workload conflicts rather than pretending that everything can fit.

## FACILITATION SEQUENCE

- 1** Choose three important commitments for the next fortnight and define the time and conditions each needs.
- 2** Record fixed obligations, travel and necessary recovery before allocating discretionary time.
- 3** Place the important commitments into the calendar with preparation and follow-through included.
- 4** Fit smaller tasks around these blocks, batching only where appropriate.
- 5** Where the plan does not fit, remove, delegate or renegotiate work and record the conversation required.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Include rest and essential personal commitments without requiring the client to disclose private details.

**APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

Date: \_\_\_\_\_

Focus / question / goal: \_\_\_\_\_

# Put the important work into the calendar

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The exercise exposes capacity limits; it does not create extra hours.

Calendar protection depends on authority, relationships and workload agreements.

Repeated displacement is information about the system, not merely a failure of discipline.

## DEBRIEF QUESTIONS

- 01** What important work currently receives only leftover time?
- 02** What is the true duration including preparation?
- 03** Which commitment cannot fit without a trade-off?
- 04** How will you protect this allocation respectfully?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A finance leader schedules two decision-preparation blocks and agrees a deputy for routine requests rather than relying on late evenings before the board meeting.

## A NEXT-STEP EXPERIMENT

Protect one important block this week and log what enabled or displaced it.

### My conclusion from this activity

---

### What I will do / what I will observe / when I will review

---

**Research basis:** [R04](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T02, E34, Q03

# See where attention really goes

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

A short time-and-attention audit replaces vague impressions with a sample of actual work. It distinguishes necessary activity, avoidable friction and work that is valuable but poorly timed. The client owns the record; this is not an employee-surveillance instrument.

## FACILITATION SEQUENCE

- 1** Choose two representative working days and record activities in manageable blocks rather than every minute.
- 2** For each block, note duration, purpose, interruptions and your own attention quality.
- 3** Classify the activity as useful delivery, necessary coordination, avoidable friction or recovery; revise categories to fit the role.
- 4** Compare the observed allocation with the responsibilities that matter most.
- 5** Choose one process change and one personal adjustment, then repeat a small sample.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

|                                      |                                           |                                           |
|--------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Client purpose</b><br><hr/> <hr/> | <b>Adaptation / access</b><br><hr/> <hr/> | <b>Evidence to revisit</b><br><hr/> <hr/> |
|--------------------------------------|-------------------------------------------|-------------------------------------------|

## BOUNDARY AND CARE

Keep names and confidential case details out of the log; do not use it as covert performance monitoring.

# See where attention really goes

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_ Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

| Date / situation | What happened | Evidence / learning |
|------------------|---------------|---------------------|
|                  |               |                     |
|                  |               |                     |
|                  |               |                     |
|                  |               |                     |
|                  |               |                     |

**What I notice from the completed activity**  

---

---

**What I need to check or understand better**  

---

---

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

---

# See where attention really goes

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Two days are a sample, not a definitive account of the job.

Low attention may reflect task conditions, fatigue or timing; do not infer a personal deficit.

Avoid converting every human interaction into a productivity cost.

## DEBRIEF QUESTIONS

- 01** What surprised you about the observed pattern?
- 02** Which apparent waste was actually necessary coordination?
- 03** Where does the system repeatedly create rework?
- 04** What small change would free the most useful attention?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An operations executive discovers that repeated clarification of incomplete requests takes more time than planned meetings. She changes the request template and ownership rule.

## A NEXT-STEP EXPERIMENT

Sample the same type of day after the change and compare the pattern, not just the total hours.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R14](#) [R10](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T03, E33, Q16

# Reduce interruptions without becoming unavailable

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This exercise distinguishes interruptions that protect the organisation from those created by unclear access rules or preventable dependency. The executive designs a more deliberate availability system while keeping genuine urgent routes open.

## FACILITATION SEQUENCE

- 1** Log recent interruptions, their source, purpose, timing and consequence.
- 2** Separate time-critical escalation from clarification, reassurance and routine approval.
- 3** Identify the underlying cause of the most repeated interruption type.
- 4** Design an access agreement: focus periods, check-in windows, delegated decisions and a genuine emergency route.
- 5** Test the agreement with affected colleagues and review whether responsiveness and focused work both improve.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not block essential safeguarding, safety or urgent operational communication.

# Reduce interruptions without becoming unavailable

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

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

|                                                                    |                                                                    |
|--------------------------------------------------------------------|--------------------------------------------------------------------|
| <b>What I notice from the completed activity</b><br>_____<br>_____ | <b>What I need to check or understand better</b><br>_____<br>_____ |
|--------------------------------------------------------------------|--------------------------------------------------------------------|

|                                                                       |
|-----------------------------------------------------------------------|
| <b>My next step / evidence I will look for / review date</b><br>_____ |
|-----------------------------------------------------------------------|

# Reduce interruptions without becoming unavailable

APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The aim is reliable availability, not maximal isolation.

A reduction in messages can hide unmet needs; ask colleagues about the effect.

Repeated reassurance requests may indicate unclear authority or fear of mistakes.

## DEBRIEF QUESTIONS

- 01** Which interruptions prevent harm or delay?
- 02** What do colleagues need that your current system does not provide?
- 03** Where have you become an unnecessary decision bottleneck?
- 04** How will you know the new boundary is fair?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A department head replaces constant approval messages with a daily decision clinic and a clear delegated-spend rule, while retaining an immediate route for safety issues.

## A NEXT-STEP EXPERIMENT

Trial the agreement for five working days and gather one colleague's experience of the change.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R14](#) [R12](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T05, E36, Q18

# One weekly plan, one daily next step

APPLY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This task planner connects a short weekly outcome list with daily execution. It is deliberately smaller than a complete project-management system. It helps a client see the next useful action, dependencies and the point at which unfinished work must be reconsidered.

## FACILITATION SEQUENCE

- 1** Write the week's intended outcomes and the fixed deadlines that genuinely matter.
- 2** Break each outcome into visible next actions, each beginning with a verb.
- 3** Identify actions waiting for another person or a decision and assign a follow-up date.
- 4** Select a feasible daily set, leaving capacity for known variability.
- 5** At day end, mark completed, renegotiated or carried forward with a reason; do not automatically roll everything over.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Use an approved secure system for business-sensitive tasks rather than recording confidential information on shared sheets.

## One weekly plan, one daily next step

**APPLY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

Protect capacity, dependencies, preparation and recovery. Adapt to your working week.

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

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

# One weekly plan, one daily next step

APPLY • ABOUT 25 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Completion counts are less important than contribution to the intended outcome.

A waiting item needs a follow-up agreement, not repeated mental checking.

Persistent carry-forward is a signal to change priority, design or ownership.

## DEBRIEF QUESTIONS

- 01** Which entry is still a project rather than an action?
- 02** What are you waiting for and who knows?
- 03** Which unfinished item should be renegotiated rather than copied forward?
- 04** What would make tomorrow's list more credible?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director turns “improve succession planning” into three next actions: agree critical roles, confirm evidence sources and schedule the first calibration meeting.

## A NEXT-STEP EXPERIMENT

Use the planner for one working week and remove one recurring source of carry-forward.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T06, Q28

# Choose what to stop, reduce or refuse

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

A stop-doing list releases capacity only when the consequences are understood and the change is communicated. This activity helps an executive distinguish unnecessary work from work that needs a different owner or a better standard.

## FACILITATION SEQUENCE

- 1** List recurring activities that consume time without a clear current purpose.
- 2** For each, identify the beneficiary, obligation and likely consequence of stopping.
- 3** Sort into stop, reduce, simplify, delegate or retain with a reason.
- 4** Choose one change and agree it with the people who rely on the activity.
- 5** Set a review point and an explicit signal that would require reinstating or revising the work.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Check mandatory, contractual and safety requirements before removing work.

**APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE**

Date: \_\_\_\_\_

Focus / question / goal: \_\_\_\_\_

| What I notice from the completed activity | What I need to check or understand better |
|-------------------------------------------|-------------------------------------------|
| <hr/> <hr/>                               | <hr/> <hr/>                               |

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

# Choose what to stop, reduce or refuse

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

An unpopular task can still be necessary.

Stopping work is a governance decision when others rely on its output.

Simplification may be safer and more useful than elimination.

## DEBRIEF QUESTIONS

- 01** Who would notice if this activity stopped?
- 02** What valid need might be hidden inside an inefficient process?
- 03** Which standard is higher than the situation requires?
- 04** How will you avoid merely passing the burden to someone else?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A business-unit head replaces a weekly narrative report with a short exception update after agreeing the essential information with its recipients.

## A NEXT-STEP EXPERIMENT

Stop or simplify one agreed activity for two cycles and check the consequences with its users.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R14](#) [R03](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T07

# Distinguish urgency from importance

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

The urgent–important matrix is used here as a conversation about consequences and timing. It helps a client protect significant work before it becomes a crisis and identify tasks whose urgency belongs elsewhere. The quadrant is a starting point for judgement, not a universal instruction.

## FACILITATION SEQUENCE

- 1 Define importance in relation to responsibilities, values and consequences.
- 2 List current tasks and record the real deadline or time sensitivity for each.
- 3 Place each task in the four-quadrant matrix and question uncertain placements.
- 4 For important non-urgent work, schedule preparation before the critical date; for other work, clarify ownership or necessity.
- 5 Choose one change that prevents repeated urgency rather than only processing it faster.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Never dismiss a colleague's issue as unimportant without understanding its consequences.

# Distinguish urgency from importance

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Important / not urgent

---

---

---

---

---

---

---

---

## Important / urgent

---

---

---

---

---

---

---

---

## Less important / not urgent

---

---

---

---

---

---

---

---

## Less important / urgent

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Distinguish urgency from importance

APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

Urgency and importance are context-dependent; review them when circumstances change.

Delegation is appropriate only with capability, authority and capacity.

The matrix cannot settle conflicts between two legitimate priorities without further discussion.

## DEBRIEF QUESTIONS

- 01** Which deadline is assumed rather than agreed?
- 02** What important work becomes urgent because it is repeatedly postponed?
- 03** Whose authority is needed to change ownership?
- 04** What would prevent this crisis from recurring?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader schedules early stakeholder consultation for a strategic decision rather than waiting until the approval deadline makes consultation superficial.

## A NEXT-STEP EXPERIMENT

Protect one important non-urgent action and review whether it reduces later pressure.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: T08, E32, Q26

# Delegate a result, not a vague task

APPLY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## PURPOSE AND INTRODUCTION

This delegation canvas helps an executive transfer a defined result with the authority, support and review arrangements needed for success. It distinguishes delegation from dumping unwanted work and from retaining control while pretending to hand it over.

## FACILITATION SEQUENCE

- 1** Choose a responsibility suitable for delegation and define the required result and boundaries.
- 2** Discuss the recipient's capability, capacity, interest and development needs rather than assuming readiness.
- 3** Agree decision authority: what they may decide, what requires consultation and what must be escalated.
- 4** Provide resources, context and proportionate checkpoints, including what good evidence looks like.
- 5** Rehearse the handover, invite the recipient to explain the agreement in their own words and set a review.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Check role, legal and professional limits before delegating regulated or high-risk decisions.

# Delegate a result, not a vague task

APPLY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Result and quality boundary

---

---

---

---

---

---

---

---

## Decision authority

---

---

---

---

---

---

---

---

## Support and capacity

---

---

---

---

---

---

---

---

## Checkpoints and escalation

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Delegate a result, not a vague task

APPLY • ABOUT 40 MINUTES • ORIGINAL HR DELIVERY RESOURCE

## INTERPRET THE RESULT CAREFULLY

The delegating leader retains relevant accountability while transferring agreed work and authority.

A capable person may still lack capacity or organisational access.

Checkpoints should match risk, not the leader's discomfort with letting go.

## DEBRIEF QUESTIONS

- 01** What result are you genuinely willing to let someone else own?
- 02** Where might your behaviour undermine the handover?
- 03** What support would make the delegation developmental?
- 04** How will you respond to a different but acceptable approach?

## WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director delegates a supplier review, agreeing selection criteria and escalation limits while allowing the manager to design the process and present the recommendation.

## A NEXT-STEP EXPERIMENT

Complete one explicit handover and ask the recipient what remained unclear after the first week.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R12](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E20, Q15

# H

## Energy, balance and relationships

### ASSESS / APPLY

Improve sustainable performance without making the individual responsible for every system failure.

## 19

### ACTIVITIES AND PRACTICE RESOURCES

Coach guide → Participant working page → Results and debrief  
Select the tool that fits the purpose. Adapt it with the client.

A clear conclusion. A proportionate next step. Evidence worth reviewing.

# The whole-life balance wheel

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

## PURPOSE AND INTRODUCTION

The wheel opens a discussion about how life is experienced across several areas. It is not a diagnostic test and a perfectly round wheel is not the objective. The client defines the areas, their meaning and the amount of attention each deserves in this season of life.

## FACILITATION SEQUENCE

- 1** Agree eight relevant areas; suggested starting labels are work, health routines, close relationships, community, learning, finances, recreation and home environment.
- 2** Define what a personally satisfactory situation would look like in each area.
- 3** Rate current satisfaction from 0 to 10, where 0 means not at all satisfied and 10 means fully satisfied by your own definition; use N/A where appropriate.
- 4** Plot the ratings and mark one or two areas you choose to discuss, considering their importance and interdependence.
- 5** Identify a manageable change and a review date; the client decides what remains private.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not pressure disclosure about money, health, family or relationships; specialist advice may be more appropriate for some concerns.

# The whole-life balance wheel

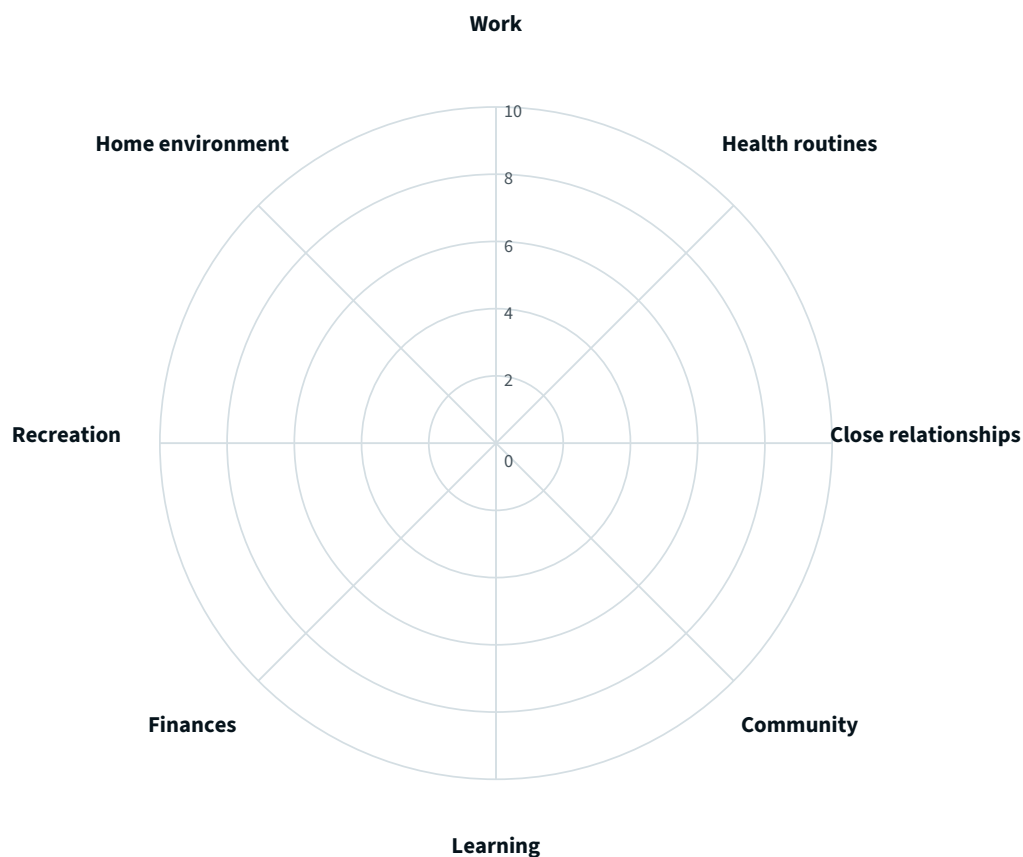
ASSESS / APPLY • ABOUT 35 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_



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

**Evidence behind my ratings / context**

\_\_\_\_\_  
\_\_\_\_\_

**Priority / uncertainty to explore**

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_

# The whole-life balance wheel

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

## INTERPRET THE RESULT CAREFULLY

Do not average the spokes or interpret the area of the polygon as a wellbeing score.

Ratings are personal and contextual; comparison between people is not meaningful.

A low score is an invitation to inquire, not proof of a problem the coach should solve.

## DEBRIEF QUESTIONS

- 01** What does the shape help you notice, without judging it?
- 02** Which area matters most in this particular season?
- 03** Where could one change help more than one area?
- 04** What would a small worthwhile improvement look like?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An expatriate executive chooses to strengthen local friendships rather than increase work achievement, recognising that support outside work is the more meaningful current priority.

## A NEXT-STEP EXPERIMENT

Take one chosen action for two weeks and revisit the same area definition before re-rating.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R01](#) [R10](#) • Conceptual support; this original activity is not independently validated.

Inventory references: W20, B08, S09, E42, FE14, SP09, IG07

# Say no while protecting the relationship

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

## PURPOSE AND INTRODUCTION

Boundary-setting requires clarity about responsibilities and consequences, not simply a more assertive phrase. This activity helps a client decide when to accept, negotiate or decline a request and practise a response that is respectful, specific and credible.

## FACILITATION SEQUENCE

- 1** Describe a real request, who is making it and the consequences of accepting or declining.
- 2** Clarify your responsibility, capacity and any power or cultural considerations.
- 3** Choose a response: accept with a clear agreement, negotiate scope or timing, or decline with a concise reason.
- 4** Practise the response: acknowledge the request, state the boundary, offer a feasible alternative where appropriate and confirm the next step.
- 5** Rehearse likely pushback and decide when to repeat the boundary, involve a manager or seek support.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not encourage confrontation where there is risk of retaliation or abuse; plan appropriate support.

# Say no while protecting the relationship

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Situation / intention

---

---

---

---

---

---

---

---

## Words or behaviour to practise

---

---

---

---

---

---

---

---

## Likely response / adjustment

---

---

---

---

---

---

---

---

## Observer feedback / next attempt

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Say no while protecting the relationship

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

## INTERPRET THE RESULT CAREFULLY

A boundary is an agreement about behaviour or access, not a judgement of another person.

Power differences may change what is safe and feasible.

A thoughtful yes with changed scope can be a stronger boundary than an unrealistic no.

## DEBRIEF QUESTIONS

- 01** What are you protecting with this boundary?
- 02** What responsibility is genuinely yours?
- 03** Where are you offering an alternative you cannot sustain?
- 04** How could the response be both clearer and more respectful?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A programme lead says, “I can complete the analysis by Thursday, or provide the headline figures tomorrow. I cannot responsibly complete the full review by tomorrow.”

## A NEXT-STEP EXPERIMENT

Use one rehearsed response and reflect on the outcome and the relationship effect.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R01](#) [R14](#) [R20](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B01

# Review relationship patterns without labelling people

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

## PURPOSE AND INTRODUCTION

This relationship review replaces labels such as toxic with observable patterns, effects and choices. It helps the client identify nourishing relationships, difficult interactions and boundaries or support that might be needed. The focus is on the client's experience and agency, not diagnosing another person.

## FACILITATION SEQUENCE

- 1** Choose a small set of relationships relevant to the coaching purpose, using initials if recorded.
- 2** Describe recent helpful and difficult interactions using observable behaviour.
- 3** Note the effect on energy, trust and ability to act, and acknowledge your contribution where relevant.
- 4** Choose whether to appreciate, clarify expectations, change a pattern, set a boundary or seek specialist support.
- 5** Prepare one proportionate conversation or action and consider safety and likely consequences.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

When coercion, harassment, violence or serious abuse is disclosed, prioritise appropriate support and safeguarding rather than relationship repair exercises.

# Review relationship patterns without labelling people

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

**Support / challenge**

\_\_\_\_\_

\_\_\_\_\_

**Information / influence**

\_\_\_\_\_

\_\_\_\_\_

**ME / SHARED PURPOSE**

**Practical help**

\_\_\_\_\_

\_\_\_\_\_

**Reciprocity / next contact**

\_\_\_\_\_

\_\_\_\_\_

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

**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

# Review relationship patterns without labelling people

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

## INTERPRET THE RESULT CAREFULLY

A single difficult exchange does not define a person or relationship.

The client's account is important but does not establish the other person's motives.

Safety and dignity take priority over preserving a relationship at any cost.

## DEBRIEF QUESTIONS

- 01** What behaviour are you reacting to rather than what label have you assigned?
- 02** What explanation remains uncertain?
- 03** Where could a clearer agreement improve the pattern?
- 04** Which situation requires support rather than a coaching experiment?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader identifies that late changes from a colleague are creating rework. She asks for an agreed cut-off and escalation process rather than describing the colleague as toxic.

## A NEXT-STEP EXPERIMENT

Try one safe, specific change and record the behaviour observed afterwards.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R01](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B03, S03, R05

# Identify what drains and restores energy

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

## PURPOSE AND INTRODUCTION

An energy map reveals patterns across tasks, interactions and working conditions. It does not measure a medical condition. The client observes what depletes attention or enthusiasm and distinguishes changes they can make from workload or organisational issues requiring a wider response.

## FACILITATION SEQUENCE

- 1** List recent activities and situations that left you depleted or more able to engage.
- 2** For each, record the context, duration and what specifically affected you.
- 3** Sort drains into reduce, redesign, recover after, or raise with someone who can change the conditions.
- 4** Identify a small source of restoration that is feasible and personally meaningful.
- 5** Select one drain to address and one restorative practice to test, then review the pattern.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Persistent or concerning fatigue, distress or physical symptoms may require healthcare or occupational-health support.

# Identify what drains and restores energy

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Drains / demanding conditions

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## Restores / supportive conditions

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Identify what drains and restores energy

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

## INTERPRET THE RESULT CAREFULLY

Self-reported energy varies with context and is not a clinical score.

A recovery practice does not compensate indefinitely for harmful workload.

Look for repeated conditions rather than drawing conclusions from one difficult day.

## DEBRIEF QUESTIONS

- 01** Which drain is unavoidable and which is unnecessarily repeated?
- 02** What part of the situation has the greatest effect?
- 03** What restores you without becoming another obligation?
- 04** Who can change the conditions you cannot change alone?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader changes a sequence of back-to-back conflict meetings, adds preparation time and asks for clearer decision ownership rather than relying only on evening relaxation.

## A NEXT-STEP EXPERIMENT

Change one draining condition and note your experience over several comparable occasions.

**My conclusion from this activity**

**What I will do / what I will observe / when I will review**

**Research basis:** [R10](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B04, S04, E44, R06

# Turn unmet needs into practical requests

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

## PURPOSE AND INTRODUCTION

This needs review helps an executive move from a general feeling of depletion to specific conditions that would support sustainable functioning. Needs may concern recovery, autonomy, connection, clarity or practical help. The client chooses language that fits their experience rather than accepting a prescribed hierarchy.

## FACILITATION SEQUENCE

- 1** Consider what currently supports and undermines your ability to function well.
- 2** Name up to five needs in plain language and describe what meeting each would look like.
- 3** Distinguish what you can provide yourself from what requires agreement or support.
- 4** Choose one need and formulate a specific, feasible request or routine.
- 5** Agree a review point and how you will know the change is helping.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Keep health and family disclosures optional; refer beyond coaching where the need requires specialist support.

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

Date: \_\_\_\_\_

Focus / question / goal: \_\_\_\_\_

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

# Turn unmet needs into practical requests

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

## INTERPRET THE RESULT CAREFULLY

Needs are not weaknesses or entitlements to any particular solution.

A request is more actionable when it describes the condition required.

Unmet organisational needs should not automatically become private self-care tasks.

## DEBRIEF QUESTIONS

- 01** What do you need rather than what do you think you should need?
- 02** Which need has been disguised as irritation or overwork?
- 03** What request would another person be able to understand and act on?
- 04** What can be improved without waiting for everything to change?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A newly promoted manager identifies a need for role clarity and requests a fortnightly priorities conversation rather than treating uncertainty as a confidence problem.

## A NEXT-STEP EXPERIMENT

Make one specific request or establish one chosen routine and review its effect after two weeks.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R10](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B06, E43

# A sustainable self-care practices review

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

## PURPOSE AND INTRODUCTION

This original reflective questionnaire reviews everyday practices that may support sustainable work and life. It is a conversation aid, not a validated wellbeing, burnout or mental-health assessment. The aim is to identify one useful improvement without prescribing a single lifestyle.

## FACILITATION SEQUENCE

- 1** Choose a recent two-week period and read the twelve items, marking N/A where a statement is not applicable.
- 2** Rate how often each statement described your experience: 0 never, 1 rarely, 2 sometimes, 3 often, 4 consistently.
- 3** Group the items under recovery, support, boundaries and practical care; calculate a domain mean only when at least two of its three items are answered.
- 4** Discuss the examples behind the ratings, especially differences between importance and opportunity.
- 5** Choose one feasible practice or organisational request and review it using the same reference period.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| <hr/>          | <hr/>               | <hr/>               |
| <hr/>          | <hr/>               | <hr/>               |

## BOUNDARY AND CARE

This questionnaire must not screen for illness or be used in employment decisions. Distress or health concerns require appropriate professional support.

# A sustainable self-care practices review

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

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

## Recovery

Mean: \_\_\_\_ n: \_\_\_\_

## Support

Mean: \_\_\_\_ n: \_\_\_\_

## Boundaries

Mean: \_\_\_\_ n: \_\_\_\_

## Practical care

Mean: \_\_\_\_ n: \_\_\_\_

### What I notice / context behind my responses

---



---

### One useful next step or question to discuss

---

# A sustainable self-care practices review

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

## INTERPRET THE RESULT CAREFULLY

Do not compute a total score or apply high/low wellbeing categories.

A two-item domain mean is provisional; with fewer than two responses leave it unscored.

Higher frequency is not automatically better in every context; discuss the client's needs and constraints.

## DEBRIEF QUESTIONS

- 01** Which response best reflects a condition you would like to change?
- 02** What gets in the way of a practice you already value?
- 03** Which improvement requires organisational support?
- 04** What would make the next step kind and realistic rather than another demand?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive reports low boundary-practice ratings during a major transition. The agreed action is a team escalation rota, not simply a personal commitment to switch off.

## A NEXT-STEP EXPERIMENT

Test one chosen practice or support arrangement for two weeks and discuss what changed.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R10](#) [R14](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: B07

# Map the people who help you move forward

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

## PURPOSE AND INTRODUCTION

A support-network map helps an executive distinguish different kinds of help rather than expecting one person to provide everything. It includes challenge, practical support, perspective, sponsorship and companionship. The aim is a reciprocal network, not a list of people to extract value from.

## FACILITATION SEQUENCE

- 1** Place yourself at the centre and identify people or communities who offer useful forms of support.
- 2** Label each connection by the support it provides and what you contribute in return.
- 3** Notice gaps, over-reliance on one relationship and support you have not asked for clearly.
- 4** Choose one existing relationship to appreciate and one connection to strengthen or develop.
- 5** Make a specific respectful request, with room for the other person to decline.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Protect other people's privacy and do not share the network map without consent.

# Map the people who help you move forward

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

**Support / challenge**

\_\_\_\_\_

\_\_\_\_\_

**Information / influence**

\_\_\_\_\_

\_\_\_\_\_

**ME / SHARED PURPOSE**

**Practical help**

\_\_\_\_\_

\_\_\_\_\_

**Reciprocity / next contact**

\_\_\_\_\_

\_\_\_\_\_

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

**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

# Map the people who help you move forward

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

## INTERPRET THE RESULT CAREFULLY

A larger network is not necessarily a more supportive one.

Different needs may require different people and professional services.

Support quality should be judged through experience, not job title or status.

## DEBRIEF QUESTIONS

- 01** Who challenges you constructively rather than only reassuring you?
- 02** Where are you expecting too much from one relationship?
- 03** What support have you not asked for explicitly?
- 04** How can this network remain reciprocal?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A country manager separates technical mentoring, peer challenge and friendship rather than expecting her line manager to meet all three needs.

## A NEXT-STEP EXPERIMENT

Appreciate one helpful connection and make one clearly bounded request this fortnight.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L03, E48, R07

# Redesign the work you enjoy and endure

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

## PURPOSE AND INTRODUCTION

The enjoyment–contribution map distinguishes tasks that are energising, useful, both or neither. It helps an executive explore job design without assuming that all disliked work should disappear. The exercise also checks whether an enjoyable activity is taking disproportionate space.

## FACILITATION SEQUENCE

- 1** List recurring activities from a representative working week.
- 2** Rate personal engagement and contribution to the role on separate 0–10 scales, explaining the basis for each.
- 3** Plot the activities and notice clusters rather than calculating a total.
- 4** For low-engagement essential work, consider simplification, collaboration, skill development or better timing.
- 5** Choose one redesign and one activity to protect, checking workload and fairness for others.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Consider role requirements, fairness and team capacity before reallocating work.

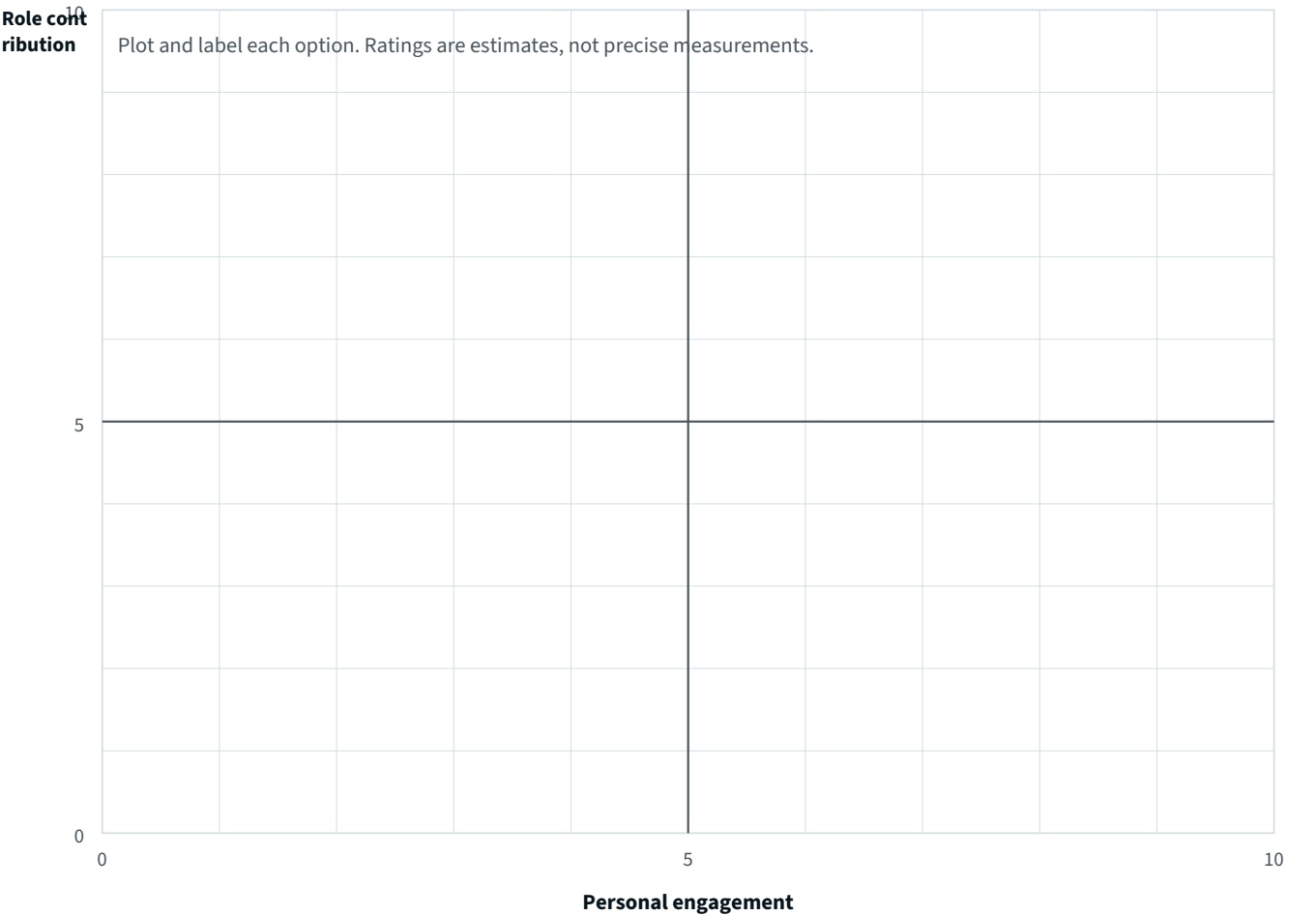
# Redesign the work you enjoy and endure

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

Client code: \_\_\_\_\_ Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_



What I notice from the completed activity

What I need to check or understand better

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

# Redesign the work you enjoy and endure

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

## INTERPRET THE RESULT CAREFULLY

Enjoyment and contribution are separate dimensions.

A low-engagement task may remain a legitimate responsibility.

The map generates job-design hypotheses, not a recommendation to abandon the role.

## DEBRIEF QUESTIONS

- 01** Which useful activity do you enjoy less because of how it is organised?
- 02** What enjoyable work may be crowding out a responsibility?
- 03** Where could a change in method matter more than a change in task?
- 04** How will you avoid transferring only unpleasant work to others?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader dislikes lengthy reporting but values the decisions it supports. She co-designs a shorter dashboard and retains a focused interpretation meeting.

## A NEXT-STEP EXPERIMENT

Test one task redesign for two cycles and review both engagement and contribution.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L04

# Build a wheel for the question you actually have

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

## PURPOSE AND INTRODUCTION

A custom wheel allows the coach and client to define relevant dimensions instead of forcing a standard life or leadership model onto every situation. It can organise discussion of a transition, partnership or role. The quality of the definitions matters more than the visual shape.

## FACILITATION SEQUENCE

- 1** Write the question the wheel should help you explore.
- 2** Agree six to eight non-overlapping dimensions that make sense to the client.
- 3** Define the scale anchors and the evidence considered for each dimension; avoid mixing satisfaction and competence on the same wheel.
- 4** Rate, plot and discuss the pattern, leaving missing dimensions blank rather than guessing.
- 5** Choose one dimension to explore and identify a concrete next action or evidence-gathering step.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not present a bespoke wheel as an assessment with established reliability, validity or norms.

# Build a wheel for the question you actually have

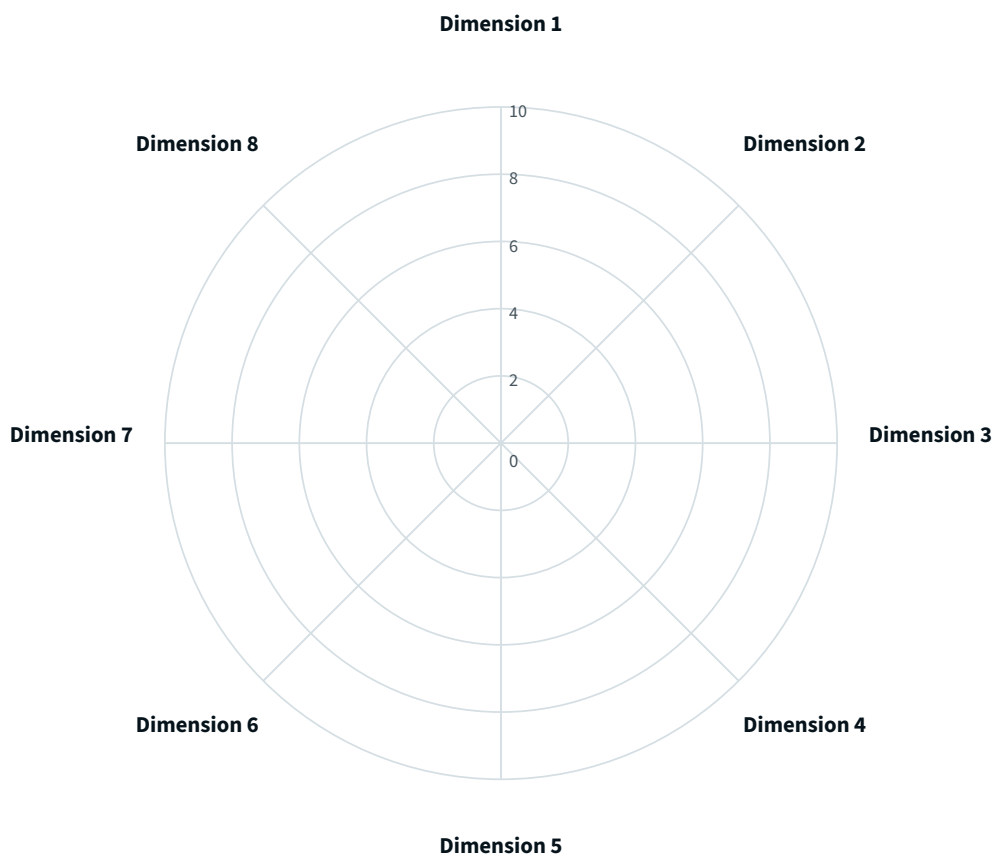
ASSESS / APPLY • ABOUT 30 MINUTES • ORIGINAL HR DELIVERY RESOURCE

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_



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

**Evidence behind my ratings / context**

\_\_\_\_\_  
\_\_\_\_\_

**Priority / uncertainty to explore**

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_

# Build a wheel for the question you actually have

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

## INTERPRET THE RESULT CAREFULLY

This is a locally designed reflective aid, not a validated scale.

Do not compare scores between differently defined wheels.

Changes in definitions prevent straightforward before-and-after comparisons.

## DEBRIEF QUESTIONS

- 01** What important dimension is missing?
- 02** Are two spokes describing the same thing?
- 03** What does a particular rating mean in observable terms?
- 04** What can the wheel not tell us?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader preparing for a regional role builds a wheel around stakeholder access, decision rights, market knowledge and team readiness rather than using a generic confidence score.

## A NEXT-STEP EXPERIMENT

Collect evidence for one uncertain spoke and revise the rating only after revisiting the definition.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R01](#) [R19](#) • Conceptual support; this original activity is not independently validated.

Inventory references: L09, FE04

# A diary of what was worth noticing

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

## PURPOSE AND INTRODUCTION

This optional gratitude practice invites the client to notice specific helpful experiences and their sources. It is not a demand to feel positive. The activity works best when small observations are connected to meaning and, where appropriate, an expression of appreciation.

## FACILITATION SEQUENCE

- 1 Choose a brief daily or several-times-weekly reflection period that does not feel burdensome.
- 2 Record one to three specific experiences you appreciated and what made them meaningful.
- 3 Notice the people, conditions or your own actions that contributed.
- 4 Decide whether to express appreciation or create conditions for a similar experience.
- 5 At the end of the week, review patterns while also acknowledging unresolved difficulties.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not use gratitude to silence complaints, grief or legitimate dissatisfaction.

# A diary of what was worth noticing

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Date and experience

---

---

---

---

## Why it mattered

---

---

---

---

## Who or what contributed

---

---

---

---

## My contribution

---

---

---

---

## Appreciation to express

---

---

---

---

## Pattern across the week

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# A diary of what was worth noticing

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

## INTERPRET THE RESULT CAREFULLY

No quota of positive feeling is required.

An entry is useful when it is personally meaningful, not impressive.

Gratitude does not remove the need to address harm or unfairness.

## DEBRIEF QUESTIONS

- 01** What did you notice that might otherwise have passed unnoticed?
- 02** What made this experience meaningful to you?
- 03** Where could appreciation be expressed specifically?
- 04** What difficult reality still needs attention alongside this reflection?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A senior manager notices that a colleague challenged a weak assumption respectfully and sends a specific message explaining why that contribution improved the decision.

## A NEXT-STEP EXPERIMENT

Try three short entries over a week and decide whether the practice is useful enough to continue.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R09](#) • Conceptual support; this original activity is not independently validated.

Inventory references: D02, IG11

# Make room for what brings you alive

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

## PURPOSE AND INTRODUCTION

This exploration identifies activities, conditions and relationships that create genuine interest or enjoyment. It is useful when an executive's life has become dominated by obligation. The output is a small, practical allocation of attention, not an instruction to pursue passion at any cost.

## FACILITATION SEQUENCE

- 1** Recall recent or earlier moments when you felt interested, absorbed or quietly content.
- 2** Describe what you were doing, who was present and which conditions mattered.
- 3** Identify recurring ingredients such as learning, making, movement, contribution or connection.
- 4** Choose one ingredient that can realistically be included in the next fortnight.
- 5** Plan a small experiment and notice its effect without requiring a dramatic transformation.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not promise that an enjoyable activity will resolve persistent low mood or other health concerns.

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

Date: \_\_\_\_\_

Focus / question / goal: \_\_\_\_\_

[illegible]

# Make room for what brings you alive

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

## INTERPRET THE RESULT CAREFULLY

Enjoyment is personal and may change over time.

A small activity can be worthwhile without becoming a career or income source.

Lack of interest that is persistent or concerning may need a conversation beyond coaching.

## DEBRIEF QUESTIONS

- 01** What kind of enjoyment are you missing rather than what should you enjoy?
- 02** Which ingredient could fit into ordinary life?
- 03** What have you dismissed because it seems unproductive?
- 04** How could you protect this without creating another performance target?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive rediscovers enjoyment in teaching and volunteers for one internal mentoring conversation rather than immediately making a major career change.

## A NEXT-STEP EXPERIMENT

Schedule one manageable experience and record what you actually noticed.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R10](#) • Conceptual support; this original activity is not independently validated.

Inventory references: D08, E47, R10, IG03

# Create opportunities for genuine friendship

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

## PURPOSE AND INTRODUCTION

Friendship can become difficult to sustain through relocation, seniority and demanding work. This activity helps the client create repeated, low-pressure opportunities for connection. It does not treat friendship as a networking target or assume that every person wants a large social circle.

## FACILITATION SEQUENCE

- 1** Describe the kind of social connection you would value and what currently makes it difficult.
- 2** Identify interests, settings or existing relationships where repeated contact is feasible.
- 3** Choose one low-pressure invitation or community activity that fits your preferences.
- 4** Plan how to show interest and follow up without assuming reciprocity.
- 5** Review the experience and adjust the approach, recognising that closeness develops by mutual choice.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Consider cultural norms, personal safety and workplace power dynamics; avoid pressuring colleagues into personal relationships.

# Create opportunities for genuine friendship

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

**Support / challenge**

\_\_\_\_\_

\_\_\_\_\_

**Information / influence**

\_\_\_\_\_

\_\_\_\_\_

**ME / SHARED PURPOSE**

**Practical help**

\_\_\_\_\_

\_\_\_\_\_

**Reciprocity / next contact**

\_\_\_\_\_

\_\_\_\_\_

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

**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

# Create opportunities for genuine friendship

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

## INTERPRET THE RESULT CAREFULLY

Connection quality matters more than the number of contacts.

A declined invitation is not a reliable judgement of personal worth.

Professional power relationships can complicate friendship and require care.

## DEBRIEF QUESTIONS

- 01** What sort of company feels comfortable and meaningful to you?
- 02** Where could repeated contact happen naturally?
- 03** What expectation could make the first step unnecessarily difficult?
- 04** How will you respect another person's choice not to engage?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A recently relocated executive joins a regular walking group and invites one acquaintance for coffee without treating the meeting as a business-development opportunity.

## A NEXT-STEP EXPERIMENT

Make one appropriate invitation or attend one recurring activity, then reflect on fit rather than success or failure.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: M08

# Strengthen a working relationship deliberately

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

## PURPOSE AND INTRODUCTION

This work-relationship inventory examines a small number of relationships that matter to an executive's effectiveness. It distinguishes trust, expectation clarity, information flow and constructive challenge. The aim is a specific improvement conversation, not a ranking of colleagues.

## FACILITATION SEQUENCE

- 1** Choose up to six working relationships relevant to a current goal.
- 2** For each, record an example of what works and what creates friction.
- 3** Consider clarity of expectations, reliability of commitments, access to information and ability to disagree constructively.
- 4** Select one relationship where a practical change could improve the work.
- 5** Prepare a conversation that asks for the other person's perspective and ends with a mutual agreement.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Do not use the inventory to diagnose personality or create secret labels for colleagues.

# Strengthen a working relationship deliberately

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

**Support / challenge**

\_\_\_\_\_

\_\_\_\_\_

**Information / influence**

\_\_\_\_\_

\_\_\_\_\_

**ME / SHARED PURPOSE**

**Practical help**

\_\_\_\_\_

\_\_\_\_\_

**Reciprocity / next contact**

\_\_\_\_\_

\_\_\_\_\_

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

**What I notice from the completed activity**

\_\_\_\_\_

\_\_\_\_\_

**What I need to check or understand better**

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

# Strengthen a working relationship deliberately

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

## INTERPRET THE RESULT CAREFULLY

The inventory records one perspective and should be tested through conversation.

Trust is not a single trait; reliability and openness may differ by situation.

A relationship improvement should benefit the shared work, not just the client's convenience.

## DEBRIEF QUESTIONS

- 01 What might this person say about working with you?
- 02 Which expectation has never been made explicit?
- 03 What evidence supports your view of the relationship?
- 04 What small reciprocal agreement could improve the work?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

Two functional directors agree when to consult before decisions after discovering that each interpreted the other's speed as disregard for their responsibilities.

## A NEXT-STEP EXPERIMENT

Hold one relationship conversation and review the agreed behaviour after two relevant interactions.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R12](#) [R11](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E31

# Restore useful energy at work

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

## PURPOSE AND INTRODUCTION

This work-focused version of the energy review examines how task design, autonomy, clarity and recovery affect engagement during the working day. It moves beyond general self-care to identify a practical change in the work system.

## FACILITATION SEQUENCE

- 1** Choose a representative week and identify periods of useful engagement and depletion.
- 2** Record the task, people, decision conditions and breaks around those periods.
- 3** Look for patterns in demands, control, support, role clarity and unnecessary rework.
- 4** Choose one change within your authority and one request requiring agreement.
- 5** Review the change against work quality and your experience, not only the amount completed.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Persistent exhaustion or concerning symptoms should prompt appropriate professional support.

## Restore useful energy at work

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

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

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

# Restore useful energy at work

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

## INTERPRET THE RESULT CAREFULLY

Energy ratings are descriptive, not medical indicators.

A work-design problem should not be reframed solely as individual resilience.

Consider whether improved energy coincides with better judgement and sustainable delivery.

## DEBRIEF QUESTIONS

- 01** What work condition makes the largest difference to your engagement?
- 02** Where is avoidable uncertainty consuming effort?
- 03** What recovery opportunity is realistic during the day?
- 04** Which change would help the team as well as you?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A director moves complex decisions away from the end of an overloaded meeting sequence and introduces clearer pre-reading and decision questions.

## A NEXT-STEP EXPERIMENT

Test one change across three comparable work occasions and note the pattern.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R14](#) [R10](#) • Conceptual support; this original activity is not independently validated.

Inventory references: E40, Q25

# Add one source of brightness to an ordinary week

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

## PURPOSE AND INTRODUCTION

This activity identifies a small improvement to the immediate experience of life or work. It is deliberately modest: a helpful environment, a meaningful connection or an activity that restores interest. It can be used early in a renewal programme to create a feasible first experiment.

## FACILITATION SEQUENCE

- 1** Notice three parts of an ordinary week that feel flat, cluttered or disconnected.
- 2** For each, imagine a small improvement that does not depend on major life change.
- 3** Choose one idea that fits your budget, access needs and available time.
- 4** Specify when and how you will try it, including any permission or support required.
- 5** Review whether the experience was worthwhile and decide to keep, adapt or stop it.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Avoid minimising grief, distress or harmful conditions with a demand to brighten up.

# Add one source of brightness to an ordinary week

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Ordinary moment to improve

---

---

---

---

## Small idea

---

---

---

---

## Why it matters

---

---

---

---

## Time and resources

---

---

---

---

## Trial arrangement

---

---

---

---

## Keep, adapt or stop

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Add one source of brightness to an ordinary week

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

## INTERPRET THE RESULT CAREFULLY

Small improvements can be valuable without solving the larger problem.

The client decides what counts as worthwhile.

A modest action should not distract from a serious unresolved issue.

## DEBRIEF QUESTIONS

- 01** What would make an ordinary day slightly more satisfying?
- 02** Which idea is genuinely yours rather than a social expectation?
- 03** How can the first experiment stay small?
- 04** What did the experience teach you about what matters?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader arranges a short weekly lunch with a trusted peer to create a reliable moment of connection during an isolating assignment.

## A NEXT-STEP EXPERIMENT

Try one small change twice and decide whether to continue it.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R19](#) [R05](#) • Conceptual support; this original activity is not independently validated.

Inventory references: R01, IG03

# Kindness as a series of chosen actions

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

## PURPOSE AND INTRODUCTION

The kindness grid turns a broad intention into specific, low-pressure actions. It is not a competition and completion of a line is optional. In executive coaching, the focus is respectful attention, useful help and fair behaviour rather than conspicuous generosity.

## FACILITATION SEQUENCE

- 1** Review the nine action prompts and adapt any that do not fit your context.
- 2** Choose two or three actions that are welcome, proportionate and within your role.
- 3** Complete them over a week without expecting recognition or reciprocal benefit.
- 4** Record what you did and what you actually observed, avoiding assumptions about the recipient's feelings.
- 5** Reflect on which behaviours you would like to make part of ordinary leadership practice.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Protect confidentiality and avoid gifts or favours that create conflicts of interest.

# Kindness as a series of chosen actions

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

**01**

Thank someone for a specific contribution.

**02**

Ask what support would be useful before offering it.

**03**

Make space for a quieter voice in a discussion.

**04**

Remove a small avoidable obstacle for someone.

**05**

Give clear credit for another person's work.

**06**

Listen without immediately advising.

**07**

Clarify an expectation that has caused uncertainty.

**08**

Make a fair boundary explicit.

**09**

Follow through on a small promise.

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

---



---

**Evidence, next step and review**

---

# Kindness as a series of chosen actions

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

## INTERPRET THE RESULT CAREFULLY

Kindness is not measured by the number of boxes completed.

Unrequested help can be intrusive; consider the recipient's agency.

A respectful difficult conversation may be kinder than avoiding necessary feedback.

## DEBRIEF QUESTIONS

- 01** Which action required attention rather than money or status?
- 02** How did you check that the help was welcome?
- 03** Where could kindness include a clear boundary or fair decision?
- 04** What would make this ordinary practice rather than a special event?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader makes time to understand a colleague's workload before offering help and then removes an unnecessary approval step rather than sending generic encouragement.

## A NEXT-STEP EXPERIMENT

Choose two actions and record their actual effects without seeking praise.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R05](#) [R12](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: FE01, IG02

# Plan a season you will be glad to have lived

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

## PURPOSE AND INTRODUCTION

This seasonal planner can be used for summer, a leave period or any personally meaningful season. It helps the client choose a few experiences and responsibilities deliberately rather than reach the end feeling that the period disappeared. It does not assume school holidays, travel or a particular climate.

## FACILITATION SEQUENCE

- 1** Define the dates and real constraints of the season, including work and family commitments.
- 2** Choose three experiences or outcomes that would make the period meaningful.
- 3** Identify one thing to protect, one thing to reduce and one practical arrangement to make early.
- 4** Place the commitments on a simple calendar with realistic cost and access considerations.
- 5** At the end, review what mattered and what you would plan differently next time.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

Consider local conditions, accessibility and family preferences without making cultural assumptions.

# Plan a season you will be glad to have lived

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

|                                          |                                           |                                           |                                           |
|------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Week 1</b><br><hr/> <hr/> <hr/> <hr/> | <b>Week 2</b><br><hr/> <hr/> <hr/> <hr/>  | <b>Week 3</b><br><hr/> <hr/> <hr/> <hr/>  | <b>Week 4</b><br><hr/> <hr/> <hr/> <hr/>  |
| <b>Week 5</b><br><hr/> <hr/> <hr/> <hr/> | <b>Week 6</b><br><hr/> <hr/> <hr/> <hr/>  | <b>Week 7</b><br><hr/> <hr/> <hr/> <hr/>  | <b>Week 8</b><br><hr/> <hr/> <hr/> <hr/>  |
| <b>Week 9</b><br><hr/> <hr/> <hr/> <hr/> | <b>Week 10</b><br><hr/> <hr/> <hr/> <hr/> | <b>Week 11</b><br><hr/> <hr/> <hr/> <hr/> | <b>Week 12</b><br><hr/> <hr/> <hr/> <hr/> |

|                                                                 |                                                                 |
|-----------------------------------------------------------------|-----------------------------------------------------------------|
| <b>What I notice from the completed activity</b><br><hr/> <hr/> | <b>What I need to check or understand better</b><br><hr/> <hr/> |
|-----------------------------------------------------------------|-----------------------------------------------------------------|

|                                                                       |
|-----------------------------------------------------------------------|
| <b>My next step / evidence I will look for / review date</b><br><hr/> |
|-----------------------------------------------------------------------|

# Plan a season you will be glad to have lived

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

## INTERPRET THE RESULT CAREFULLY

A meaningful season does not require travel or high expenditure.

The plan should reflect the client's own priorities, not an idealised lifestyle.

Changed circumstances may justify changing the plan.

## DEBRIEF QUESTIONS

- 01** What would you be pleased to remember about this period?
- 02** What expectation does not fit your circumstances?
- 03** Which arrangement needs to be made early?
- 04** How can the plan leave room for rest and spontaneity?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

An executive planning a hot Gulf summer chooses early-morning activity, family time and one learning project rather than an unrealistic list of outdoor commitments.

## A NEXT-STEP EXPERIMENT

Make one practical arrangement this week and place one meaningful experience in the calendar.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R03](#) [R10](#) • Conceptual support; this original activity is not independently validated.

Inventory references: FE02

# Notice strain and choose the right response

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

## PURPOSE AND INTRODUCTION

This awareness poster and conversation guide helps a client notice changes in their own functioning and connect them to support or work-design action. It is not a stress diagnosis or a clinical screening test. Use the client's own observations and distinguish immediate support needs from longer-term prevention.

## FACILITATION SEQUENCE

- 1** Invite the client to describe changes they have noticed in thinking, feelings, physical comfort or behaviour, without requiring disclosure.
- 2** Ask when the changes occur and what work or life conditions may be contributing.
- 3** Consider the work-design areas of demands, control, support, relationships, role and change.
- 4** Agree an appropriate response: practical adjustment, a conversation with the organisation, occupational health or healthcare support.
- 5** Record a follow-up date and what would prompt earlier help; stop the exercise if the person needs immediate support.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
| _____          | _____               | _____               |
| _____          | _____               | _____               |

## BOUNDARY AND CARE

For immediate danger, severe symptoms or risk of self-harm, prioritise local emergency or crisis support and the agreed safeguarding procedure.

# Notice strain and choose the right response

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## What I have noticed

---

---

---

---

---

---

---

---

## Context and demands

---

---

---

---

---

---

---

---

## Appropriate support

---

---

---

---

---

---

---

---

## Next step / earlier-help signal

---

---

---

---

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Notice strain and choose the right response

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

## INTERPRET THE RESULT CAREFULLY

Common signs can have many causes and do not establish a diagnosis.

A coach should not interpret physical symptoms or recommend treatment.

Workload and organisational conditions deserve attention alongside individual coping.

## DEBRIEF QUESTIONS

- 01** What change in your usual functioning is most important to notice?
- 02** What condition could be changed rather than endured?
- 03** Who is appropriately placed to support you?
- 04** What would tell you not to wait for the next coaching session?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

A leader notices persistent difficulty switching off and asks for occupational-health support while renegotiating an unsustainable escalation rota with the organisation.

## A NEXT-STEP EXPERIMENT

Agree one immediate support step and one work-design conversation, with the client's consent.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R14](#) [R13](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: FE07, FW03

# Five specific things to appreciate

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

## PURPOSE AND INTRODUCTION

This brief gratitude reflection is suitable at the end of a session or a demanding period when the client chooses it. It asks for five concrete observations rather than broad claims that everything is positive. The client may name fewer or decline the exercise.

## FACILITATION SEQUENCE

- 1** Invite the client to consider the recent period and choose whether this reflection is useful today.
- 2** Record up to five specific experiences, contributions or resources they appreciate.
- 3** For each, add why it mattered and avoid turning the entry into an obligation.
- 4** Choose one appreciation to express or one helpful condition to protect.
- 5** Close by acknowledging anything difficult that still needs attention.

## PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared.

## COACH'S PREPARATION NOTES

| Client purpose | Adaptation / access | Evidence to revisit |
|----------------|---------------------|---------------------|
|                |                     |                     |
|                |                     |                     |

## BOUNDARY AND CARE

Do not use this activity to avoid discussing loss, injustice or distress.

# Five specific things to appreciate

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

Client code: \_\_\_\_\_

Date: \_\_\_\_\_

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

Focus / question / goal: \_\_\_\_\_

## Experience or contribution

---

---

---

---

## Why it mattered

---

---

---

---

## Who or what helped

---

---

---

---

## Appreciation to express

---

---

---

---

## Condition to protect

---

---

---

---

## Difficulty still to address

---

---

---

---

## What I notice from the completed activity

---

---

## What I need to check or understand better

---

---

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

---

# Five specific things to appreciate

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

## INTERPRET THE RESULT CAREFULLY

Five is a prompt, not a required score or completion standard.

Appreciation and dissatisfaction can coexist.

The value lies in attention and meaning, not in comparing lists.

## DEBRIEF QUESTIONS

- 01** Which observation feels most genuine rather than expected?
- 02** What resource did you already have that you had not noticed?
- 03** What appreciation could be communicated specifically?
- 04** What still deserves attention despite these helpful experiences?

### WORKED EXECUTIVE EXAMPLE — FICTIONAL

After a demanding project, a director recognises reliable teamwork, a useful challenge, practical family support, an improved process and one moment of genuine rest.

## A NEXT-STEP EXPERIMENT

Express one specific appreciation and retain one helpful condition next week.

**My conclusion from this activity**

---

**What I will do / what I will observe / when I will review**

---

**Research basis:** [R09](#) • Conceptual support; this original activity is not independently validated.

Inventory references: FE08, IG11