

Additional Coaching exercises

Coaching practice & business owners

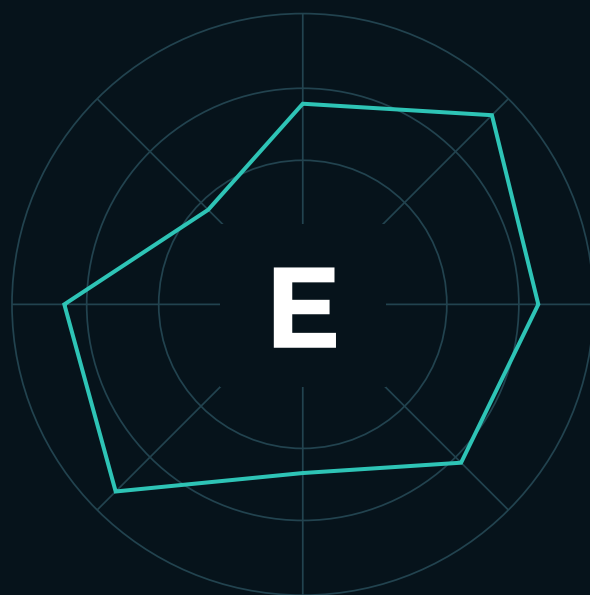
Run a clear coaching relationship. Support sound owner-led decisions.

20

activities and practice resources

Coach guides, working pages,
results and debriefs

MASTER PAGES 436-502



Make the service as clear as the conversation

The coaching relationship is shaped by the invitation, the agreement, the records and the follow-through as well as by the session itself.

A client's experience of coaching begins before the first substantial conversation. An invitation can clarify the purpose or leave it vague. A welcome letter can help someone prepare or create unnecessary expectations. This guide treats these small operational details as part of a thoughtful professional service.

Use the practice resources to make decisions explicit. Explain what is being offered, collect only information that is needed and distinguish a request for coaching from a choice to receive marketing. An invoice or a receipt should be clear about what it records. Adapt templates to the actual service and obtain appropriate local review where required.

The communication activities are intended to help people understand the work, not to promise a transformation that cannot be guaranteed. Describe the purpose, the process and the next step in straightforward language. Keep fictional examples, educational reflections and actual client evidence distinct. Do not turn confidential coaching material into promotional content.

The business-owner activities shift the focus to the relationship between the owner's development and the business. Explore direction, turning points, strengths and weaknesses with an identifiable decision in view. A coaching exercise can help an owner think, but it does not replace financial, legal or other specialist analysis.

Keep the person and the business connected without treating them as the same thing. A personal preference may affect a strategic choice; a business constraint may affect the owner's capacity. Ask what evidence belongs to each level, who else should be involved and what authority or advice is needed before action is taken.

Select only the forms and activities that serve the engagement. The practical standard is clarity: the client knows what has been agreed, the coach knows what to record and the next business conversation has a defined purpose. Good administration should leave more attention available for the work, not create a new burden around it.

THE PRACTITIONER'S STANDARD

Clear administration supports trust; clear boundaries support useful advice.

Introduction

This guide combines practice forms and communication with business-owner coaching. The first section supports the delivery and administration of a coaching service. The second helps an owner examine business direction and capability while keeping personal development, business evidence and specialist-advice boundaries separate.

01

Prepare and administer the service

Use invitations, welcome information, client records and straightforward financial documents.

02

Communicate with care

Explain coaching, manage explicit newsletter choice and gather useful workshop feedback.

03

Coach the owner in context

Examine the business history, strengths, weaknesses and future direction with a practical decision attached.

A SUGGESTED STARTING ROUTE

ACE-007	A business-owner discovery conversation	496
ACE-003	Business SWOT with a decision attached	484
ACE-006	Turn a business vision into a tested route	493
ACE-001	The owner's annual business direction plan	478

For practice administration, go directly to the relevant form and adapt its fields. For owner coaching, agree whether the conversation concerns the person, the business or both before selecting an exercise.

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 E-i, E-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

GUIDE F	Working agreement drafting template	515
GUIDE F	Business-owner adaptation notes	540
GUIDE F	Fifty-space connection register	544

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

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

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.

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N

Practice forms and communication

ALIGN / AGREE / ASSURE

Support the coaching relationship with clear, proportionate administration.

12

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.

A clear invitation to an introductory coaching conversation

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

PURPOSE AND INTRODUCTION

This voucher-style invitation provides a transparent way to offer an introductory conversation. It states the purpose, duration, eligibility and booking route without implying guaranteed outcomes or using pressure. It is a practice communication template, not a transferable financial instrument.

FACILITATION SEQUENCE

- 1** Define the purpose and duration of the introductory conversation and whether there is any charge.
- 2** Complete the recipient, provider, booking route, validity period and any genuine eligibility conditions.
- 3** State what the conversation includes and does not include, including that there is no obligation to continue.
- 4** Review the wording for accuracy, accessibility and any organisational approval requirements.
- 5** After the conversation, record whether the person wishes to explore coaching, seek another service or take no further action.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

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

BOUNDARY AND CARE

Check local consumer, advertising and organisational requirements before commercial use.

A clear invitation to an introductory coaching conversation

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Recipient or audience

Provider and contact

Purpose and duration

What I notice from the completed activity

What I need to check or understand better

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

A clear invitation to an introductory coaching conversation

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

INTERPRET THE RESULT CAREFULLY

The invitation is not evidence that coaching is appropriate for every recipient.

A useful introductory outcome can be referral or no further engagement.

Only record the minimum contact information needed.

DEBRIEF QUESTIONS

- 01** Is the offer understandable without additional explanation?
- 02** Could any wording imply a result you cannot promise?
- 03** Is declining further coaching genuinely easy?
- 04** What information does the recipient need before booking?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

HR Delivery offers a 30-minute introductory conversation to discuss goals, coaching boundaries and fit, with no obligation to purchase a programme.

A NEXT-STEP EXPERIMENT

Test the wording with a colleague unfamiliar with the offer and correct any ambiguity.

My conclusion from this activity

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

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

Inventory references: W12, FW02, FA04, SP13

A clear invitation to an introductory coaching conversation

Read or adapt the text below within the agreed purpose and professional boundaries.

INTRODUCTORY COACHING CONVERSATION

For: [recipient or eligible audience]

Provided by: HR Delivery / [named coach]

Duration and format: [minutes; online or in person]

Purpose: A conversation about your objectives, how coaching works and whether this service is a suitable next step.

Fee: [state clearly, including “no charge” where accurate]

Booking: [contact or approved booking link]

Valid until: [date, if applicable]

Conditions: [only genuine, clearly stated conditions]

There is no obligation to continue. This conversation is not a clinical assessment, legal consultation or guarantee of a particular outcome.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

Build a referral network through genuine usefulness

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

PURPOSE AND INTRODUCTION

This practice-development map organises up to fifty potential professional connections without treating people as sales targets. It focuses on relevance, trust, mutual usefulness and consent. The number fifty is a capacity for the register, not a required achievement.

FACILITATION SEQUENCE

- 1** Define the coaching work you are qualified to provide and the people it is appropriate for.
- 2** Identify existing and potential connections in five groups: trusted peers, complementary professionals, organisational contacts, professional communities and former contacts who have consented to further communication.
- 3** For each, record the relationship context, mutual relevance and a respectful next step.
- 4** Choose a few relationships to strengthen through useful conversation rather than sending a mass request.
- 5** Review outcomes, preferences and conflicts of interest; remove people who do not wish to be contacted.

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 client confidentiality and disclose any relevant financial interests in referrals.

Build a referral network through genuine usefulness

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Support / challenge

Information / influence

ME / SHARED PURPOSE

Practical help

Reciprocity / next contact

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

What I notice from the completed activity

What I need to check or understand better

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

Build a referral network through genuine usefulness

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

INTERPRET THE RESULT CAREFULLY

A referral network should not be judged only by volume.

Referral fees or incentives require transparent handling and appropriate review.

Do not infer consent from a public profile or a past client relationship.

DEBRIEF QUESTIONS

- 01** Why would this connection be useful to both people?
- 02** What competence or scope boundary should be clear?
- 03** Where could a referral create a conflict of interest?
- 04** What would respectful non-response or refusal look like?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A coach develops a reciprocal relationship with an occupational-health professional, clearly distinguishing coaching from clinical care and avoiding promises of mutual referrals.

A NEXT-STEP EXPERIMENT

Have one useful, non-pressured professional conversation and record the agreed follow-up.

My conclusion from this activity

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

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

Inventory references: W13, FE06, FA05

A transparent coaching invoice

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

PURPOSE AND INTRODUCTION

This invoice template supports clear administration by separating the service description, fee, applicable tax treatment and payment details. It is a document structure, not accounting or tax advice. The provider must verify required fields and treatment for the relevant jurisdiction.

FACILITATION SEQUENCE

- 1** Confirm the contracting parties, authorised billing recipient and agreed service terms.
- 2** Complete a unique invoice number, issue date, service period and accurate description.
- 3** Show quantity, rate, subtotal, any verified tax and the total due; do not assume that a particular tax rate applies.
- 4** Add payment instructions, due date and a contact for queries, checking bank details independently.
- 5** Reconcile the invoice to the agreement and record payment status securely.

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

Obtain accounting or legal advice on required invoice fields, taxes and cross-border transactions.

A transparent coaching invoice

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

Client code: _____ Date: _____

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

Focus / question / goal: _____

Provider / authorised recipient _____	Reference / date / currency _____
---	---

Service / invoice reference	Quantity	Rate	Amount

Verified tax treatment / total / balance (as applicable)

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

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

A transparent coaching invoice

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

INTERPRET THE RESULT CAREFULLY

An invoice records a payment request, not proof of payment.

The service description should be sufficient for billing without exposing confidential session content.

Tax and currency treatment must be verified for the actual transaction.

DEBRIEF QUESTIONS

- 01** Can the recipient understand exactly what is being charged?
- 02** Does the invoice match the agreed service and rate?
- 03** Which fields or tax treatment need professional verification?
- 04** How will a payment query be resolved without sharing coaching content?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An invoice describes “Executive coaching sessions, agreed programme, September” rather than disclosing the client’s personal development topics.

A NEXT-STEP EXPERIMENT

Check the invoice against the signed commercial agreement before issue.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W14, FA06, SP14

A receipt that confirms what was received

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

PURPOSE AND INTRODUCTION

This receipt template provides a concise record of payment received. It is distinct from an invoice and should identify the transaction it settles. It avoids recording unnecessary personal or coaching information.

FACILITATION SEQUENCE

- 1** Confirm that the payment has actually been received and reconciled.
- 2** Enter the receipt number, date, payer, amount and currency.
- 3** Reference the invoice or agreed service and describe the payment method without exposing full financial credentials.
- 4** Record any remaining balance or clearly state that the referenced amount is settled.
- 5** Send the receipt to the authorised recipient and retain it according to the agreed records policy.

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 local financial-record requirements and use secure, verified payment information.

A receipt that confirms what was received

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

Client code: _____ Date: _____

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

Focus / question / goal: _____

Provider / authorised recipient

Reference / date / currency

Payment reference	Date	Method	Amount received

Verified tax treatment / total / balance (as applicable)

What I notice from the completed activity

What I need to check or understand better

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

A receipt that confirms what was received

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

INTERPRET THE RESULT CAREFULLY

A receipt must reflect an actual received payment.

A partial payment should not be described as full settlement.

Financial records and coaching notes should be kept appropriately separate.

DEBRIEF QUESTIONS

- 01** What evidence confirms that the payment was received?
- 02** Is the receipt clearly linked to the correct invoice?
- 03** Could any unnecessary financial or coaching information be removed?
- 04** Who is authorised to receive and retain it?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A receipt confirms the amount and invoice reference while omitting session topics and masking unnecessary transaction details.

A NEXT-STEP EXPERIMENT

Reconcile one sample receipt to its invoice and payment record before using the template routinely.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: W16, FA08, SP15

A welcome letter that prepares the client

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

PURPOSE AND INTRODUCTION

This welcome letter makes the first stage of coaching clear and reassuring. It explains practical arrangements, preparation, confidentiality boundaries and how the client can raise questions. It should match the actual coaching agreement rather than introduce new terms casually.

FACILITATION SEQUENCE

- 1** Complete the coach, client, programme purpose and first-session details.
- 2** Explain what preparation is useful and make clear that sensitive written disclosure is optional.
- 3** Summarise confidentiality by referring to the agreed terms, including any sponsor arrangements.
- 4** State contact, cancellation and accessibility arrangements accurately.
- 5** Invite questions and ask the client to confirm that the arrangements are understood.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Use only approved secure contact and meeting arrangements.

A welcome letter that prepares the client

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Client and coach

Purpose and first appointment

Optional preparation

What I notice from the completed activity

What I need to check or understand better

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

A welcome letter that prepares the client

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

INTERPRET THE RESULT CAREFULLY

A warm welcome should not promise unconditional confidentiality where exceptions apply.

The letter supports but does not replace informed contracting.

Accessibility needs should be invited without requiring diagnosis disclosure.

DEBRIEF QUESTIONS

- 01** What uncertainty might a new client still have after reading this?
- 02** Does the letter match the actual agreement?
- 03** Is the preparation proportionate and optional where appropriate?
- 04** How can the client raise a concern without embarrassment?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client receives clear joining details, a short optional reflection prompt and a direct invitation to discuss access preferences before the first meeting.

A NEXT-STEP EXPERIMENT

Review the letter from a first-time coaching client's perspective and remove unexplained jargon.

My conclusion from this activity

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

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

Inventory references: W19, FA09, SP16

A welcome letter that prepares the client

Read or adapt the text below within the agreed purpose and professional boundaries.

Dear [client name],

Welcome to your coaching work with HR Delivery. Our agreed purpose is [purpose in the client's words]. Our first meeting is [date, time, time zone, location or secure joining details].

Before we meet, you may find it useful to note one situation you would like to work on, why it matters and what would make the conversation useful. You do not need to send private background information in advance.

We will confirm our working agreement, including confidentiality, any sponsor communication, records and the limits of coaching. Please refer to [agreement reference] for the agreed terms.

For scheduling questions, use [contact]. Our agreed cancellation arrangements are [accurate summary]. Please let me know about any access or communication preference that would help you participate comfortably.

You are welcome to ask questions about the process or raise a concern at any stage.

With best wishes,

[named coach]

HR Delivery

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A proportionate client information record

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

PURPOSE AND INTRODUCTION

This intake record captures only information needed to organise and provide coaching responsibly. It separates contact and contracting details from sensitive reflective notes. The client should understand why information is requested and how it will be used.

FACILITATION SEQUENCE

- 1** Identify the minimum information needed for the engagement and remove fields with no clear purpose.
- 2** Record preferred name, contact route, time zone, role context and authorised sponsor or billing contact where relevant.
- 3** Invite access and communication preferences without requiring unnecessary health details.
- 4** Record agreement dates, permissions, emergency or safeguarding arrangements where appropriate and the records-policy reference.
- 5** Ask the client to check accuracy and explain how they can request corrections.

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

Verify applicable privacy and records requirements; do not treat this template as jurisdiction-specific compliance advice.

A proportionate client information record

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Preferred name and contact

Role context and time zone

Authorised sponsor or billing contact

Access and communication preferences

Agreements and permissions

Records policy and correction route

What I notice from the completed activity

What I need to check or understand better

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

A proportionate client information record

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

INTERPRET THE RESULT CAREFULLY

Completing a form does not itself establish informed consent.

A sponsor contact is not automatically authorised to receive session information.

Data minimisation should be designed before collection.

DEBRIEF QUESTIONS

- 01 Why is each field necessary for this engagement?
- 02 What information could be kept out of the administrative record?
- 03 Who genuinely needs access to this record?
- 04 How will the client correct or update it?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A coach records that a client prefers written agendas and captions without asking for a medical explanation.

A NEXT-STEP EXPERIMENT

Audit the record and remove one field that lacks a clear purpose.

My conclusion from this activity

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

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

Inventory references: FA02, SP12

An explicit newsletter choice

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

PURPOSE AND INTRODUCTION

This sign-up template separates optional marketing communication from participation in coaching or a workshop. It explains what will be sent, by whom and how to stop it. The design avoids pre-ticked consent and unnecessary personal data.

FACILITATION SEQUENCE

- 1 Define the newsletter topic, likely frequency and sender accurately.
- 2 Collect only the contact information needed and provide a concise privacy-information reference.
- 3 Present an unticked affirmative choice, separate from service terms or event attendance.
- 4 Record the consent wording, date and source in an approved system.
- 5 Provide a straightforward withdrawal route and honour preferences promptly under the applicable requirements.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Have privacy and electronic-marketing requirements reviewed for the relevant jurisdictions.

An explicit newsletter choice

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Newsletter purpose and frequency

Sender and contact

Email or preferred delivery route

Unticked consent statement

Date, wording version and source

Withdrawal and privacy-information route

What I notice from the completed activity

What I need to check or understand better

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

An explicit newsletter choice

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

INTERPRET THE RESULT CAREFULLY

A business card or event registration is not automatically permission for all future marketing.

Consent and other lawful requirements depend on the actual context and jurisdiction.

A clear preference record is more useful than a long contact list of uncertain origin.

DEBRIEF QUESTIONS

- 01** Can someone attend or receive coaching without subscribing?
- 02** Is the communication frequency stated honestly?
- 03** What evidence records the person's actual choice?
- 04** How easy is it to stop receiving messages?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A workshop form offers a separate optional choice to receive a monthly coaching-practice note, leaving attendance unaffected by the decision.

A NEXT-STEP EXPERIMENT

Test the sign-up and withdrawal process before inviting real subscribers.

My conclusion from this activity

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

Research basis: R01 • Conceptual support; this original activity is not independently validated.

Inventory references: FW04, FA07

An explicit newsletter choice

Read or adapt the text below within the agreed purpose and professional boundaries.

OPTIONAL HR DELIVERY COACHING PRACTICE NOTE

What you will receive: [accurate topic and likely frequency].

Email: [blank field]

[] I choose to receive this communication from HR Delivery. I understand that this is optional and that I can stop it using [withdrawal route].

Privacy information: [approved notice or contact].

For the provider's record: consent date [], wording version [], source [].

Do not pre-tick the box or make coaching, event participation or another service conditional on this choice.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A workshop readiness and delivery checklist

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

PURPOSE AND INTRODUCTION

This checklist helps a coach or facilitator prepare the conditions for a useful workshop. It combines purpose, participant needs, logistics, safety and follow-through. It is not enough to have slides and a room; the session must connect with an organisational need and a feasible next step.

FACILITATION SEQUENCE

- 1** Confirm the purpose, audience, sponsor expectations and what the workshop is not intended to achieve.
- 2** Check participant information, access needs, group size, confidentiality and any power-sensitive topics.
- 3** Prepare the agenda, materials, timing, technology, room or online arrangements and a contingency plan.
- 4** Before delivery, confirm consent arrangements for recording, photographs or data collection; default to no recording unless agreed.
- 5** After delivery, collect proportionate feedback, confirm actions and review the facilitation process.

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 appropriate risk assessment for the actual venue and activities; avoid physical exercises without access and safety review.

A workshop readiness and delivery checklist

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Purpose and success evidence

Audience and access needs

Agenda and materials

Logistics and contingency

Consent and safety checks

Follow-through and review

What I notice from the completed activity

What I need to check or understand better

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

A workshop readiness and delivery checklist

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

INTERPRET THE RESULT CAREFULLY

A smooth event is not the same as a useful learning outcome.

Readiness includes participant conditions as well as facilitator preparation.

Feedback and action ownership should be designed before the event.

DEBRIEF QUESTIONS

- 01** What must participants be able to do after the session?
- 02** Which access or hierarchy issue could reduce participation?
- 03** What would you change if time or technology failed?
- 04** Who owns the follow-through after the facilitator leaves?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A facilitator provides a seated alternative, private response route and clear action owner before a mixed-seniority leadership workshop.

A NEXT-STEP EXPERIMENT

Run a short rehearsal and test the most important contingency before delivery.

My conclusion from this activity

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

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

Inventory references: FW07

Workshop feedback that leads to improvement

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

PURPOSE AND INTRODUCTION

This original feedback form separates relevance, facilitation, participation conditions and intended application. It is not a validated evaluation instrument and should not be reduced to a single satisfaction score. Open comments identify what to retain and change.

FACILITATION SEQUENCE

- 1** Explain why feedback is being collected, whether it is anonymous and who will see it.
- 2** Ask participants to rate the six items from 1 strongly disagree to 5 strongly agree, with N/A available.
- 3** Collect two open responses: what was most useful and what should change.
- 4** Summarise item distributions and comments without identifying people in small groups.
- 5** Choose a specific improvement and, where agreed, follow up later on actual application rather than immediate satisfaction alone.

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 anonymity honestly; do not promise it when names, handwriting or small-group context may identify respondents.

Workshop feedback that leads to improvement

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

Client code: _____

Date: _____

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

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

What I notice / context behind my responses

One useful next step or question to discuss

Workshop feedback that leads to improvement

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

INTERPRET THE RESULT CAREFULLY

Do not compute a total quality score or claim validated cut-offs.

Report the number of responses and missing items alongside any item summaries.

Immediate intention to apply is not evidence that application occurred.

DEBRIEF QUESTIONS

- 01** Which feedback concerns relevance rather than facilitation style?
- 02** What can the ratings not tell us about later application?
- 03** Could a small group make a comment identifiable?
- 04** What change will you make because of the feedback?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

Feedback shows that participants valued the topic but lacked enough practice time, so the next workshop reduces presentation content and adds a second rehearsal.

A NEXT-STEP EXPERIMENT

Make one documented design change and check its effect in the next delivery.

My conclusion from this activity

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

Research basis: [R12](#) [R22](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: FW08

A year of useful coaching conversations

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

PURPOSE AND INTRODUCTION

This content-planning activity turns monthly coaching themes into practical questions, reflection prompts and small experiments. It supports newsletters, learning groups or client resources without claiming that social-media engagement is evidence of coaching impact. The companion content bank contains original text, not copied quotations.

FACILITATION SEQUENCE

- 1 Choose an audience and a clear educational purpose for the year.
- 2 Use the twelve monthly learning cards, adapting timing and language to the audience rather than assuming a universal calendar.
- 3 For each month, select four questions, four journal prompts and four grounded intention statements linked to actual activities.
- 4 Add a clear invitation to reflect or practise, avoiding clinical claims, guaranteed outcomes and invented client stories.
- 5 Review accessibility, attribution, confidentiality and whether the content leads to a useful conversation or action.

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 publish client material without specific permission or imply that generic prompts replace individual assessment or professional care.

A year of useful coaching conversations

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

A year of useful coaching conversations

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

INTERPRET THE RESULT CAREFULLY

Published content is educational and does not create a coaching relationship by itself.

Original reflection lines are not quotations from named experts.

Topic coverage is not equivalent to supplying every commercial graphic format.

DEBRIEF QUESTIONS

- 01 What should this content help the reader do?
- 02 Which claim needs evidence or more cautious wording?
- 03 How can the material respect people who do not want coaching?
- 04 What would count as usefulness beyond likes or clicks?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

HR Delivery uses a monthly theme on boundaries to share one practical question, a rehearsal prompt and an invitation to consider a feasible request rather than a motivational slogan.

A NEXT-STEP EXPERIMENT

Pilot one week of content with a small relevant audience and ask what was useful or unclear.

My conclusion from this activity

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

Research basis: [R01](#) [R03](#) [R19](#) • Conceptual support; this original activity is not independently validated.

Inventory references: SC01, SC02, SC03, SC04, SC05, SC06, SC07, SC08, SC09, SC10, SC11, SC12, N04

Explain the value and limits of coaching

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

PURPOSE AND INTRODUCTION

This communication canvas helps a coach describe what coaching offers without claiming it is the answer to every problem. It can support a one-page information sheet, introductory conversation or educational graphic. The message should distinguish the process, possible benefits and the client's role.

FACILITATION SEQUENCE

- 1** Define the audience and the decisions they need to make about coaching.
- 2** Explain the process in plain language: agree a purpose, explore evidence and perspectives, choose actions and review learning.
- 3** Describe possible areas of value cautiously, linking them to the person's goals rather than guaranteed outcomes.
- 4** State the limits, including when therapy, specialist advice, training or organisational action may be more appropriate.
- 5** Invite questions and provide a clear, non-pressured next step.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Avoid overstated credentials, guaranteed transformations and unsubstantiated health or performance claims.

Explain the value and limits of coaching

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Purpose / need

Behaviour / action

Evidence / effect

Review / learning

What I notice from the completed activity

What I need to check or understand better

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

Explain the value and limits of coaching

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

INTERPRET THE RESULT CAREFULLY

Coaching evidence at programme level does not validate every method or guarantee individual results.

A clear explanation includes both benefits and limits.

The client's agency is central to the relationship.

DEBRIEF QUESTIONS

- 01** What might a first-time client misunderstand about coaching?
- 02** Which benefit is a possibility rather than a promise?
- 03** What alternative service may be more appropriate in some cases?
- 04** How can the message support an informed choice rather than a sale?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An information sheet explains that coaching can support reflection and deliberate practice while clarifying that the coach does not make the executive's decisions or provide clinical treatment.

A NEXT-STEP EXPERIMENT

Ask someone unfamiliar with coaching to explain the offer back to you and correct misunderstandings.

My conclusion from this activity

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

Research basis: [R01](#) [R02](#) • Conceptual support; this original activity is not independently validated.

Inventory references: WH01, WH02, WH03, WH04, WH05, WH06, WH07, WH08, P09, IG06, BND01

Explain the value and limits of coaching

Read or adapt the text below within the agreed purpose and professional boundaries.

COACHING: A STRUCTURED SPACE TO THINK AND ACT

We begin with a purpose that matters to you. Together we examine the situation, question assumptions, consider options and choose practical experiments. We review what happens and adjust the approach.

Coaching may support clearer decisions, more deliberate leadership behaviour and useful learning. Results depend on your circumstances, the quality of the work and the conditions around you; no particular outcome is guaranteed.

You remain responsible for your choices. The coach contributes a disciplined process, challenge, reflection and support within an agreed professional scope.

Coaching is not a substitute for therapy, medical care, legal or financial advice, or action the organisation itself needs to take.

A first conversation can help you decide whether coaching is an appropriate next step.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.

A transparent coaching partnership charter

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

PURPOSE AND INTRODUCTION

This charter expresses twelve commitments in an original HR Delivery voice. It replaces idealised claims about how a coach always feels with observable professional commitments that can be discussed and reviewed. It is an orientation resource, not a substitute for the working agreement.

FACILITATION SEQUENCE

- 1** Read the twelve commitments with the client and explain how each will be enacted in this engagement.
- 2** Ask which commitment matters most and whether any expectation needs clarification.
- 3** Connect confidentiality, challenge and accountability to the actual agreement rather than vague assurances.
- 4** Invite the client to describe their own participation preferences and responsibilities.
- 5** Revisit the charter when the relationship needs adjustment or at a scheduled 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

Do not promise unlimited availability, unconditional secrecy or expertise beyond the coach's competence.

A transparent coaching partnership charter

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

Client code: _____

Date: _____

01 We will agree a purpose that matters to you.

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

03 We will be clear about confidentiality and its limits.

04 I will listen carefully and check my understanding.

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

06 We will distinguish evidence from assumptions.

07 We will recognise strengths without ignoring difficulties.

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

09 We will turn useful insight into realistic experiments.

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

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

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

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

A transparent coaching partnership charter

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

INTERPRET THE RESULT CAREFULLY

A charter is credible only when reflected in behaviour.

Warmth does not remove professional boundaries or necessary challenge.

The client may question or revise expectations within the agreed scope.

DEBRIEF QUESTIONS

- 01** Which commitment would make the greatest difference to your experience of coaching?
- 02** What does useful challenge look like for you?
- 03** How will you tell the coach when the approach is not helping?
- 04** What responsibility do you want to take for the work?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A client and coach agree that challenge should begin with an observation and a question, rather than a forceful interpretation presented as truth.

A NEXT-STEP EXPERIMENT

Use the charter at the next review to identify one thing to retain and one thing to adjust.

My conclusion from this activity

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

Research basis: [R01](#) [R18](#) • Conceptual support; this original activity is not independently validated.

Inventory references: CH01, CH02, CH03, CH04, CH05, CH06, CH07, CH08, CH09, CH10, CH11, CH12, CH13, CH14, P09, BND01, CHG



Business-owner coaching

ALIGN / ASSESS / APPLY

Keep business evidence, owner development and professional-advice boundaries distinct.

08

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 owner's annual business direction plan

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

PURPOSE AND INTRODUCTION

This business-owner version separates the owner's aspirations from the evidence of what the business needs. It links a small number of annual outcomes with customer value, operational capacity and responsible governance. It is a coaching decision aid, not a financial forecast or business valuation.

FACILITATION SEQUENCE

- 1** Clarify the owner's ambition and the business purpose, including who benefits and what must be protected.
- 2** Review available evidence about customers, operations, people and financial capacity with appropriate advisers where needed.
- 3** Choose a small number of annual outcomes and define indicators, assumptions and boundaries for each.
- 4** Sequence the outcomes by dependencies and resources, identifying decisions that need specialist advice or governance approval.
- 5** Translate the first quarter into experiments and review points rather than treating the annual plan as fixed.

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 provide investment, tax or legal recommendations through this coaching worksheet.

The owner's annual business direction plan

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

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

What I notice from the completed activity

What I need to check or understand better

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

The owner's annual business direction plan

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

INTERPRET THE RESULT CAREFULLY

An attractive target is not evidence that the business can achieve it.

Financial, legal and regulatory assumptions require appropriate professional review.

The plan should remain revisable as evidence changes.

DEBRIEF QUESTIONS

- 01** Where do your personal preferences differ from what the business currently needs?
- 02** Which outcome has the strongest evidence of customer value?
- 03** What assumption could make the plan unworkable?
- 04** What must be protected while pursuing growth?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner prioritises reliable delivery and a stronger management layer before opening another location, after recognising that expansion would amplify existing capacity problems.

A NEXT-STEP EXPERIMENT

Test one first-quarter assumption before making an irreversible commitment.

My conclusion from this activity

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

Research basis: [R03](#) [R21](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q01, Q06, Q07

The business history and turning-point map

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

PURPOSE AND INTRODUCTION

This business-history map examines how the enterprise developed, which choices shaped it and what patterns may still influence the owner. It distinguishes business evidence from the founder's personal story while recognising that both can matter.

FACILITATION SEQUENCE

- 1** Draw a timeline from the business's beginning to the present and mark major decisions, customer shifts, people changes and external events.
- 2** For each turning point, record what was known then, what decision was made and what happened afterwards.
- 3** Identify recurring strengths, constraints and assumptions that persisted after conditions changed.
- 4** Ask which founder-era habits remain useful and which now limit the organisation.
- 5** Choose one historical lesson that should influence a current decision.

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 confidential commercial and personal information out of group versions unless authorised.

The business history and turning-point map

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

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



Turning point 	Now / implication
---	---

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

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

The business history and turning-point map

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

INTERPRET THE RESULT CAREFULLY

Hindsight can make past decisions appear more obvious than they were.

A successful outcome does not prove that every part of the decision was sound.

The map should distinguish business patterns from personal identity judgements.

DEBRIEF QUESTIONS

01 Which past success has become an unquestioned rule?

02 What external condition contributed to the result?

03 What did the business learn that is not yet embedded in a process?

04 Which founder habit may now need to change?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner recognises that personally approving every exception helped an early-stage business but now delays a larger team, prompting clearer delegated authority.

A NEXT-STEP EXPERIMENT

Use one historical lesson to revise a current operating or governance decision.

My conclusion from this activity

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

Research basis: [R17](#) [R19](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q08

Business SWOT with a decision attached

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

PURPOSE AND INTRODUCTION

This business-specific SWOT examines internal capabilities and limitations alongside external opportunities and threats. It requires evidence and a decision consequence for each entry. The goal is not a complete list but a better strategic choice.

FACILITATION SEQUENCE

- 1** Define the business decision and planning horizon before filling the four quadrants.
- 2** List internal strengths and weaknesses with evidence from customers, delivery, people or verified financial information.
- 3** List external opportunities and threats, distinguishing observed changes from assumptions.
- 4** Select the few interactions that matter most, such as a strength that could address an opportunity or a weakness that increases a threat.
- 5** Choose an action, an assumption to test and any specialist advice needed.

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 qualified advisers for financial, legal, regulatory and investment judgements.

Business SWOT with a decision attached

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Strengths — internal

Weaknesses — internal

Opportunities — external

Threats — external

What I notice from the completed activity

What I need to check or understand better

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

Business SWOT with a decision attached

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

INTERPRET THE RESULT CAREFULLY

SWOT is a structuring device, not a strategy by itself.

Financial and market assumptions require verification.

A long list can conceal the few issues that materially affect the decision.

DEBRIEF QUESTIONS

- 01** Which item is genuinely internal and which is external?
- 02** What evidence makes this more than the owner's opinion?
- 03** Which interaction between quadrants matters most?
- 04** What decision should change because of this analysis?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A specialist service business uses a strong client relationship base to test a new service, while addressing dependence on one delivery expert before wider expansion.

A NEXT-STEP EXPERIMENT

Test one opportunity with proportionate evidence before scaling the commitment.

My conclusion from this activity

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

Research basis: [R03](#) [R21](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q09

Turn a business strength into a repeatable capability

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

PURPOSE AND INTRODUCTION

This activity distinguishes an apparent business strength from a capability that can be delivered reliably without depending entirely on the owner. It helps identify the process, people and conditions behind good outcomes.

FACILITATION SEQUENCE

- 1** Choose a business outcome that customers or other stakeholders consistently value.
- 2** Identify specific evidence of the strength and the people, processes and resources that create it.
- 3** Test whether the strength is repeatable across situations or depends on one person's exceptional effort.
- 4** Choose how to protect, document, develop or scale the capability without weakening quality.
- 5** Define an experiment and the evidence that would show whether the capability is more reliable.

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 infer commercial value or valuation from a qualitative strength description.

Turn a business strength into a repeatable capability

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Valued business outcome

Evidence of strength

People and process enablers

Dependency or fragility

Capability-building action

Reliability evidence

What I notice from the completed activity

What I need to check or understand better

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

Turn a business strength into a repeatable capability

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

INTERPRET THE RESULT CAREFULLY

A founder's skill can be an asset and a dependency at the same time.

Customer praise is useful evidence but should be considered alongside consistency and outcomes.

Scaling a strength may require a different process, not simply more effort.

DEBRIEF QUESTIONS

- 01** What makes this a business capability rather than a personal talent?
- 02** Where is the strength vulnerable to absence or growth?
- 03** What must remain consistent as the business expands?
- 04** How can the capability be shared without losing its quality?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner turns excellent personal client onboarding into a documented process with trained colleagues and a quality review, reducing dependence on her availability.

A NEXT-STEP EXPERIMENT

Test the capability with another suitably supported person and review the result.

My conclusion from this activity

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

Research basis: [R08](#) [R03](#) [R14](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q04

Manage a business weakness proportionately

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

PURPOSE AND INTRODUCTION

This business-focused development-gap exercise assesses a limitation by its consequences, causes and available responses. It avoids treating every weakness as something the owner must personally master. Options include development, process redesign, recruitment, partnership or specialist advice.

FACILITATION SEQUENCE

- 1** Describe one business limitation through observable effects rather than a broad label.
- 2** Assess where it affects customers, delivery, people or governance and how urgent the consequences are.
- 3** Identify likely causes and the evidence still needed before choosing a response.
- 4** Compare develop, redesign, recruit, partner, outsource or accept with safeguards, considering cost and dependency.
- 5** Choose a proportionate next step with an owner, review point and risk boundary.

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 legal, financial, safety and regulatory issues to appropriately qualified professionals.

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

Date: _____

Focus / question / goal: _____

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

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

Manage a business weakness proportionately

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

INTERPRET THE RESULT CAREFULLY

A weakness in one context may not matter in another.

Outsourcing transfers work but does not automatically remove accountability or dependency.

The response should match the consequence and business stage.

DEBRIEF QUESTIONS

- 01** What problem are you trying to solve rather than what label are you applying?
- 02** Which cause is supported by evidence?
- 03** What should the owner learn and what should the business obtain elsewhere?
- 04** What risk remains after the proposed response?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

A small business owner obtains qualified accounting support and improves source records rather than attempting to become the organisation's tax expert.

A NEXT-STEP EXPERIMENT

Take one evidence-gathering or specialist-support step before committing to a major solution.

My conclusion from this activity

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

Research basis: [R03](#) [R14](#) [R01](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q11

Turn a business vision into a tested route

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

PURPOSE AND INTRODUCTION

This route map connects a preferred business future with the assumptions and capabilities needed to reach it. It is especially useful when the owner has a persuasive vision but an unclear path. The first output is a sequence of tests, not a promise of success.

FACILITATION SEQUENCE

- 1** Describe the future business in terms of customers served, value provided, operating conditions and the owner's role.
- 2** Work backwards to identify the capabilities and milestones that would need to exist.
- 3** List the assumptions about demand, capacity, people and resources on which the route depends.
- 4** Choose the earliest useful test and define what would count as supportive or disconfirming evidence.
- 5** Agree the next decision gate and what advice or governance approval is required before proceeding.

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

Obtain appropriate advice before financial, legal or regulatory commitments.

Turn a business vision into a tested route

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

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

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

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

Turn a business vision into a tested route

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

INTERPRET THE RESULT CAREFULLY

A route map is a hypothesis about development, not a forecast.

Disconfirming evidence can prevent expensive commitment.

A business milestone should not depend on the owner sustaining an unrealistic workload.

DEBRIEF QUESTIONS

- 01** Which part of the vision is a preference and which is supported by demand?
- 02** What capability must exist before the next milestone?
- 03** What evidence would make you change direction?
- 04** What is the smallest responsible test of the route?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner pilots a new service with a small number of appropriate customers and defined delivery limits before hiring a full team around the idea.

A NEXT-STEP EXPERIMENT

Run the first bounded test and review the evidence before the next commitment.

My conclusion from this activity

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

Research basis: [R03](#) [R21](#) [R04](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q10

A business-owner discovery conversation

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

PURPOSE AND INTRODUCTION

This intake conversation distinguishes the owner as a person, the business as a system and the coaching engagement as a bounded service. It identifies the decision or development need while clarifying where specialist advice or organisational work is required.

FACILITATION SEQUENCE

- 1** Ask the owner to describe the business, their role and the reason for seeking coaching now.
- 2** Explore the current challenge through customer, operational, people and governance evidence without conducting an unauthorised audit.
- 3** Ask how the challenge affects the owner and what they would like to do differently.
- 4** Clarify stakeholders, decision authority, confidentiality, conflicts and any existing professional advisers.
- 5** Agree a coaching purpose, success evidence and the boundaries of what the coach will and will not provide.

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

Clarify conflicts of interest and do not give legal, tax, investment or clinical advice outside competence.

A business-owner discovery conversation

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

Client code: _____

Date: _____

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

Focus / question / goal: _____

Business and owner role

Reason for coaching now

Current evidence and challenge

Personal development need

Stakeholders and advisers

Agreed scope and evidence

What I notice from the completed activity

What I need to check or understand better

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

A business-owner discovery conversation

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

INTERPRET THE RESULT CAREFULLY

An owner's account is a starting perspective, not a verified business diagnosis.

Business and personal goals may conflict and should be made explicit.

A coach should not imply expertise in every aspect of running a business.

DEBRIEF QUESTIONS

- 01** Is the central issue a coaching need, a business-system problem or a specialist-advice need?
- 02** What evidence would help us understand it more accurately?
- 03** Who else has authority or a legitimate stake in the decision?
- 04** What would a useful engagement enable you to do?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner's request for confidence coaching reveals unclear partner decision rights, leading to a bounded coaching goal alongside a separate governance-advice conversation.

A NEXT-STEP EXPERIMENT

Agree one coaching outcome and one information or specialist-support step before choosing further exercises.

My conclusion from this activity

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

Research basis: [R01](#) [R18](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q17

Three perspectives on the business you want to build

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

PURPOSE AND INTRODUCTION

These three original business-vision exercises explore the future through customer experience, operating reality and the owner's role. They are alternatives, not three tests to score. Use one or compare all three to reveal tensions that a single optimistic vision might hide.

FACILITATION SEQUENCE

- 1** Choose a realistic future date and explain that the three scenes are imagined, not predictions.
- 2** Complete the customer scene: describe a specific customer experience and the evidence that would make it valuable.
- 3** Complete the operating-day scene: describe how work, decisions and delivery would function on an ordinary day.
- 4** Complete the owner-role scene: describe what the owner does, no longer does and must learn or delegate.
- 5** Compare the scenes, identify inconsistencies and choose one assumption to test or capability to develop.

PREPARE

Participant working page, pen or PDF annotation tool, and a clear agreement about what will be shared. Read the original script or template page before use.

COACH'S PREPARATION NOTES

Client purpose	Adaptation / access	Evidence to revisit

BOUNDARY AND CARE

Keep imagined customer quotations and financial outcomes clearly fictional; verify business assumptions with appropriate evidence and advice.

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

Date: _____

Focus / question / goal: _____

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

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

Three perspectives on the business you want to build

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

INTERPRET THE RESULT CAREFULLY

These are independently written function-based alternatives; the supplier's three unpublished business scripts were not obtained.

The scenes should expose constraints as well as possibilities.

No financial or commercial outcome is implied by a vivid vision.

DEBRIEF QUESTIONS

- 01** What does the customer scene require that the operating scene does not yet provide?
- 02** What is the owner still doing that would limit the future business?
- 03** Which part of the vision depends on an untested assumption?
- 04** What would make the three scenes coherent?

WORKED EXECUTIVE EXAMPLE — FICTIONAL

An owner sees that the promised fast customer response cannot coexist with personally approving every decision, prompting a delegation and service-standard experiment.

A NEXT-STEP EXPERIMENT

Test one inconsistency between the three scenes before developing a larger plan.

My conclusion from this activity

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

Research basis: [R03](#) [R21](#) [R20](#) • Conceptual support; this original activity is not independently validated.

Inventory references: Q27

Three perspectives on the business you want to build

Read or adapt the text below within the agreed purpose and professional boundaries.

SCENE 1 — THE CUSTOMER’S EXPERIENCE. Imagine an ordinary customer using the business at the chosen future date. What need brought them here? What happens at each important contact? What would they actually receive, observe or be able to do? Write one plausible account without invented praise. Then list the evidence you would need to show that the experience is reliable.

SCENE 2 — AN ORDINARY OPERATING DAY. Imagine a typical working day, not a launch event or an exceptional success. Who makes which decisions? Where does work wait? How are mistakes noticed and addressed? What information do colleagues need? Describe the conditions that make delivery dependable and identify the capability most likely to be missing today.

SCENE 3 — THE OWNER’S ROLE. Imagine your own working week in that business. What are you responsible for? What have you stopped doing? Who has authority that you currently retain? What do you need to learn, and what expertise should come from someone else? Notice any conflict between the role you want and what the business would require.

COMPARE. Place the three scenes side by side. Identify one contradiction, one dependency and one early test. Treat the vision as a proposition to investigate, not a future already secured.

Use the companion participant page to record the experience or completed details. The client chooses what to disclose; no particular response or outcome is required.