



HR DELIVERY

Making Sure HR Delivers

Coaching and Mentoring at Work

Designing Relationships and Programmes That Support Development



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A FOREWORD PREPARED FOR DR PHILLIP WELSH

Help people think. Help learning travel.

**DR PHILLIP WELSH****Founder and Managing Director**

HR Delivery

Foreword text prepared for approval

A useful developmental relationship does more than make someone feel listened to. It gives them room to think, a clearer view of the choices available and support to try something different in their work. The conversation matters. So do the conditions around it.

When you are new to coaching or mentoring, it is tempting to search for the perfect question. Begin with a simpler responsibility: understand why this relationship exists and what the person needs from it. Sometimes careful inquiry is helpful. Sometimes an experienced colleague should offer advice. Sometimes the right answer is training, a management decision or specialist support rather than another conversation.

This book keeps those distinctions visible. HR Delivery's 6A coaching system connects organisational purpose, a trustworthy agreement, thoughtful practice and workplace application. The mentoring architecture keeps programme governance, portfolio purpose and relationship practice distinct. The aim is not to make the

relationship bureaucratic. It is to protect the freedom to learn within conditions everyone understands.

Read the annotated conversations slowly. Notice the moments when a practitioner asks rather than assumes, offers a perspective without imposing it, or names a boundary before trust is damaged. Try the working records with a real, modest development need. Ask a colleague to challenge the choices you make.

You do not need to sound like a coach in every conversation. You need to be clear about your role, respectful of the other person's agency and willing to learn from what happens next. Programme owners have an equal responsibility: provide access, capable practitioners, time to apply learning and a safe route when a relationship is not working.

My hope is that this book helps you build relationships that are both warm and useful, and programmes that earn the confidence placed in them.

Prepared for Dr Phillip Welsh. Approval is required before publication under his name.

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Welcome. Make the learning useful.

You may be preparing to coach a colleague, join a mentoring relationship or design a programme for the first time. The vocabulary can make the work seem more mysterious than it needs to be. Begin with a practical question: what kind of help would make a useful difference to this person's work, and what conditions would allow them to use it?

This book teaches both the relationship and the organisational system around it. Coaching and mentoring share an interest in development, but they are not interchangeable. Coaching supports reflection, choices and learning within an agreed partnership. Mentoring makes relevant experience, advice, challenge and connections available without taking ownership of the mentee's future. The right response may also be instruction, management action, a system change or specialist support rather than either relationship.

The framework foundation

The controlling coaching source is HR Delivery's 6A Workplace Coaching System: Align, Agree, Assess, Activate, Apply and Assure. Its organisation, programme and engagement levels remain distinct. The mentoring source uses MENTOR for

programme governance, BRIDGE for primary purpose and RELATE for relationship practice. These architectures are preserved rather than replaced by a new acronym invented for the book.^[2] ^[3]

The explanations, conversations, cases and working records are educational applications. They are not the complete 88-tool coaching suite or 91-tool mentoring suite, and the resource IDs in this book do not replace the original toolkit IDs. The purpose is to provide a coherent first practitioner handbook, with routes to the deeper source material.

Read in two ways

For a first encounter, read Chapters 1-8 to understand the relationship, then Chapters 9-12 to design, evaluate and sustain the programme. Work through the two fictional cases before using the resources. For a live assignment, start with the relevant question: suitability, contracting, feedback, mentoring, ethics, programme design or evaluation. The contents, bookmarks and resource index provide direct routes.

A programme owner should pay particular attention to access, capacity, practitioner support and information boundaries. A

coach or mentor should study the annotated conversations and practise with feedback. A sponsor should read the programme and evaluation chapters before requesting evidence of value. A manager should notice when coaching is appropriate and when their authority requires a clear instruction or performance conversation.

Use assessment proportionately

The assessment companion connects actual HR Delivery tools with specific development questions. It preserves differences between preference, judgement, experienced behaviour, reasoning and contextual evidence. A catalogue description is not technical validation. Use authorised instruments and manuals, qualified interpretation and relevant language and population evidence. The book does not reproduce protected item banks or create a substitute psychometric test. ^{[6] [12] [19] [20]}

Practise on real work, with permission

Choose a modest development need and build one commission, agreement and experiment. Ask a colleague to challenge your reasoning. Rehearse difficult moments before using them in a real

relationship. Where real people or information are involved, obtain the necessary permissions and remain within your competence and authority.

The cases are wholly fictional. Madar Facilities explores a coaching pilot that discovers operational barriers. Harbour Skills Partnership explores mentoring for knowledge transfer without imposing a management career. Their numbers teach calculation and interpretation; they are not client results, market benchmarks or evidence that the proposed interventions will succeed.

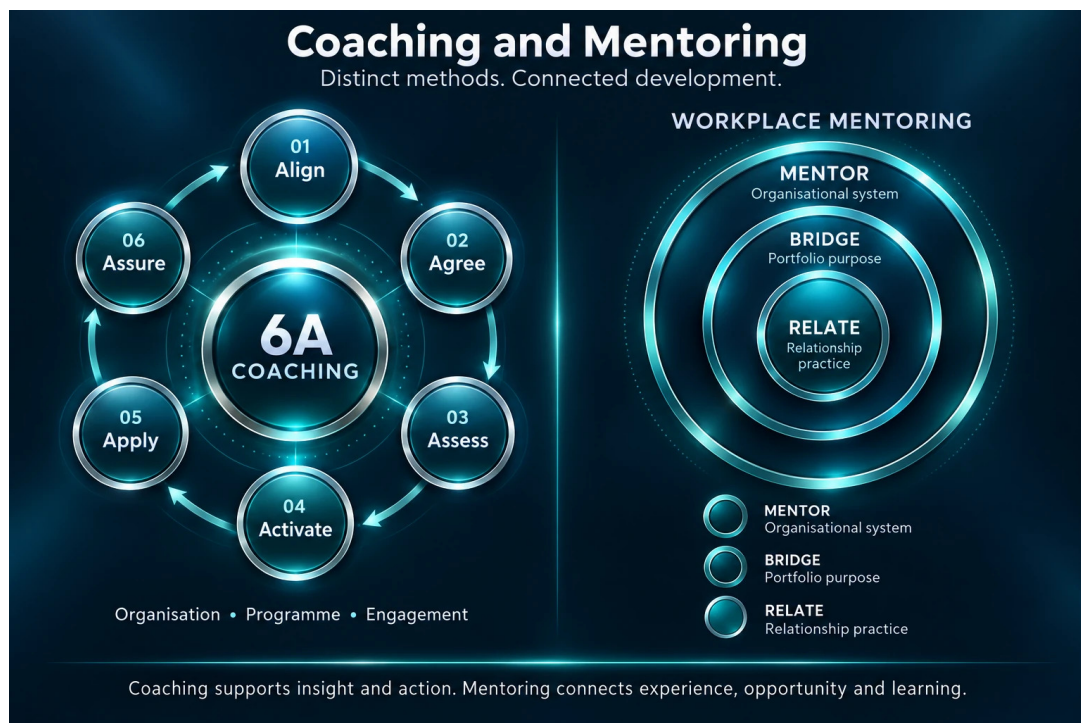
The boundary of the book

This is not a clinical manual, professional accreditation or country-specific legal guide. Coaching and mentoring do not replace formal employment procedures, technical authorisation or qualified health support. Local verification notes identify decisions that require the relevant specialist. The foreword is prepared for Dr Phillip Welsh's approval; independent professional approval is not implied by the design of the document.

You do not need to master every tool before beginning. You need a clear purpose, an honest agreement, careful attention to the person and a willingness to learn from application. Start with one useful conversation and make the conditions around it trustworthy.

THE PUBLISHED HR DELIVERY FRAMEWORK

Coaching and mentoring: connected, not identical



Original HR Delivery framework artwork, retained from the supplied Framework Directory, p.30. ^[1]

The 6A coaching system connects Align, Agree, Assess, Activate, Apply and Assure. It operates at organisation, programme and engagement levels. The quality lens is Ethical, Useful, Applied and Evidenced. ^[2]

Mentoring keeps three different questions visible: MENTOR governs the system; BRIDGE selects the primary programme purpose; RELATE guides the relationship. BRIDGE categories are alternatives, not six stages that every relationship must complete. ^[3]

WORKED EXHIBIT

6A: the decision at each stage

Stage	Question and useful output
Align	Is coaching an appropriate response to an evidenced need? Output: charter and value hypothesis.
Agree	Can all parties explain purpose, rights, information boundaries and exit? Output: four-way contract and information protocol.
Assess	What goal, context, baseline and barriers are sufficiently understood? Output: contextual formulation and evidence plan.
Activate	Does the dialogue expand awareness, choice and agency? Output: coachee-owned options and commitment.
Apply	How will learning be practised in actual work? Output: experiment, support and feedback.
Assure	What should be protected, improved, adapted or stopped? Output: quality and contribution decision.

Source-derived stage architecture and outputs, summarised from the HR Delivery 6A system. Assurance runs throughout, not only at closure. ^[2]



01

Understand the relationship

Read the explanations, examine the worked decisions and apply the method to a real, appropriately bounded situation.

Chapter 01 / Defining coaching and mentoring

Chapter 02 / Selecting the appropriate approach

Chapter 03 / Contracting for a trustworthy relationship

CHAPTER 01 / UNDERSTAND THE RELATIONSHIP

Defining coaching and mentoring

A colleague sits down and says, 'I need to become more confident.' That sounds like a suitable starting point for coaching, but it is not yet a useful agreement. Confident about what? In which situations? What would the colleague do differently? Are they missing a skill, working without clear authority, facing an unreasonable workload, or finding a familiar task difficult in a new setting? Your first contribution is to make the request more understandable, not to select a technique immediately.

This book uses coaching and mentoring as developmental relationships connected to work. Coaching supports reflection, choices, experimentation and learning within an agreed partnership. Mentoring brings relevant experience, advice, challenge and developmental connections into that partnership. Both can involve listening and questions. Neither is defined simply by how much the practitioner talks. The distinction lies in the purpose, the contribution agreed and the responsibilities each person accepts. These working definitions follow HR Delivery's source methodologies. ^[2] ^[3]

Start with the kind of help required

Imagine three requests from newly appointed managers. Farah knows how to delegate but takes work back when a deadline approaches. Bilal has never prepared a workforce budget and needs to understand the calculation and approval process. Huda understands her technical role but is unfamiliar with the relationships involved in leading a regional partnership. Each person might appreciate a supportive conversation. They do not necessarily need the same service.

Farah may benefit from coaching that examines her assumptions, rehearses a different response and tests it in a real delegation. Bilal needs instruction, examples and supervised practice before a coach's questions can help him make sound budget choices. Huda may benefit from a mentor who can explain how the partnership operates, offer several perspectives and introduce her to relevant colleagues with permission. These are fictional illustrations, not diagnostic rules. A careful first discussion could reveal different needs.

A developmental relationship is therefore a response to a defined learning need. It is not a reward for seniority, a discreet punishment for disappointing performance or an automatic addition to every talent programme. A person can decline a proposed match while remaining committed to development. An organisation can decide that the proposed intervention is unsuitable without making a negative judgement about the person's worth.

Coaching is a partnership, not concealed instruction

The coachee needs meaningful influence over the goals, the conversation and the action they will undertake. That does not mean every organisational condition is negotiable. Safety requirements, professional standards, employment responsibilities and legitimate business constraints remain. The coach helps the person think and act within a context that is made explicit rather than pretending it does not exist.

A useful coach can ask, 'Which part of this situation is within your discretion?' That is different from implying that every problem can be solved through a personal change in attitude. When a manager has responsibility for a service but no authority to allocate resources, the developmental task may include negotiating a decision with the sponsor. It may also require the organisation to change the arrangement. Coaching is

weakened when a system problem is assigned entirely to the individual.

The coach's expertise includes managing the process of inquiry. The coachee brings knowledge of their experience and work. Neither person needs to claim complete knowledge. The coach may offer information or an observation, but should make the change of contribution visible: 'Would an observation be useful?' or 'There is a policy point we need to check before exploring options.' Asking permission is not a ritual phrase. It gives the other person a genuine opportunity to accept, question or decline the contribution.

Mentoring is more than advice from a senior person

Relevant experience is the resource a mentor brings, not proof that their career is the correct route for somebody else. A mentor can make their reasoning visible: the context they faced, the options available, the action they chose, what happened and what they would now do differently. This allows the mentee to learn from experience without copying it uncritically.

Seniority and mentoring suitability are not interchangeable. A technically experienced colleague may be an excellent mentor for a specialist transition while a more senior executive has little relevant knowledge or available time. Reverse and reciprocal arrangements can also be useful when the learning purpose

is clear. The person with expertise in one area may be a learner in another. These arrangements require the same care with power, boundaries and participation as conventional pairs. ^[3]

Mentoring should broaden the mentee's options. A mentor who becomes the only source of approval, blocks other relationships or expects personal loyalty has moved away from that purpose. Developmental connections are offered with consent. Sponsorship, where someone actively advocates for another person's opportunities, is a separate role that should be named. It should not be promised merely because a mentoring relationship exists.

Keep adjacent responsibilities visible

Line management includes assigning work, setting standards, making decisions, reviewing performance and addressing concerns. A manager can use coaching skills within that role, but cannot remove their employment authority by calling the meeting coaching. A direct report may reasonably be cautious about what they share with the person who evaluates their performance. The manager should explain the actual limits of privacy and the decisions that remain theirs. ^{[2] [15]}

Training provides knowledge and practice against a defined requirement. Consulting supplies analysis or advice on an organisational problem. Mediation helps parties work through a dispute under an

appropriate agreement. Formal investigations establish facts through an authorised process. Therapy and clinical care address needs requiring appropriately qualified health practitioners. These activities can complement development, but a coaching or mentoring label does not authorise a practitioner to perform them.

A practical boundary sentence is: 'I can help you think about the work decision, but I am not the right person to assess or treat the health concern you have described.' Another is: 'This allegation needs the organisation's formal route. We can discuss how you obtain support, but this conversation will not replace that process.' The exact response and information-sharing duties must follow verified local procedures. The principle is to recognise the boundary early and help the person reach suitable support without making promises you cannot keep.

The 6A system: six connected responsibilities

HR Delivery's 6A Workplace Coaching System is the controlling coaching architecture in this book. **Align** connects the proposed relationship with a worthwhile need. **Agree** establishes rights, responsibilities and information boundaries. **Assess** develops a proportionate understanding of the person, role and system. **Activate** uses skilled dialogue to create awareness and choices. **Apply** turns those choices into workplace practice. **Assure** reviews

quality, learning and contribution and determines what should continue, change or stop. ^[2]

These are not six compulsory questions in a session. They describe responsibilities across an organisation, a programme and an individual engagement. A sponsor may be making an Align decision while a coach and participant are working on Apply. New evidence may require a return to Agree. Assurance is continuous: a confidentiality concern cannot wait until the final evaluation form.

The source system is supported by six enablers: Strategic sponsorship; Coach capability; Culture and manager ecosystem; Equity and access; Data and technology; Governance and improvement. Its quality lens is **Ethical, Useful, Applied and Evidenced**. The enablers matter because a well-conducted session can still fail when the participant has no opportunity to practise or no safe route to question the arrangement. ^[2]

Use the framework as an organising discipline rather than a claim that the intervention is proven. The source explicitly describes 6A as an original

evidence-informed synthesis, not an independently validated causal model, professional qualification or clinical protocol. Your implementation still needs to show that the intended people can access it, use it safely and apply useful learning. ^[2]

Three mentoring models with different jobs

The mentoring architecture avoids asking one model to do everything. **MENTOR** governs the programme through Mandate & Mobilise; Evidence & Engineer; Nominate & Match; Train & Contract; Operate & Assure; and Review & Renew. It addresses the organisational work that happens before, around and after individual meetings. ^[3]

BRIDGE identifies the primary portfolio purpose. The alternatives are Business Capability; Role Transitions; Inclusion & Access; Development & Careers; Generational Knowledge; and Ecosystem & Engagement. These are choices of purpose, not six steps that every mentee must pass through. A knowledge-continuity programme should not use the same success measures as a

programme intended to improve access to professional networks. ^[3]

RELATE guides relationship practice: Readiness & Rapport; Expectations & Ethics; Listen & Learn; Advise, Challenge & Connect; Translate into Action; and Evaluate & Evolve. A mentor may return to an earlier step when a new issue changes the relationship. For example, an introduction to a senior decision-maker may require a fresh discussion of expectations before it is made. ^[3]

The combined directory uses CCF for Coaching and Mentoring Framework. It also uses CCF for Competency and Capabilities Framework elsewhere. This book spells out the names when there is any risk of confusion. A coaching model, a competency architecture and an assessment instrument have different purposes even when their abbreviations overlap. ^[1]

What a good outcome looks like

For a participant, a useful outcome might be a clearer choice, a more effective conversation, a new working habit or

better access to relevant experience. For a programme owner, it also includes a trustworthy process: fair access, capable practitioners, manageable workload and appropriate information handling. For a sponsor, the important question is how development contributes to work, while recognising other influences.

A meeting can be emotionally satisfying without producing a useful work change. Equally, a difficult session can be valuable if it helps the person see a constraint honestly and choose a better response. Do not evaluate the relationship from warmth alone, from action counts alone or from a business result that many other people helped create. Later chapters show how to combine these perspectives without reducing them to one misleading score.

As you begin, choose one real relationship or proposed programme. Write four sentences: the work-related need; why a developmental relationship is suitable; what the person and organisation will each contribute; and what would make you reconsider the approach. If the second sentence is difficult, pause. That is useful information about the commission, not a failure of your coaching vocabulary.



The right relationship begins with a clear purpose, not a favourite conversation model.

Selecting the appropriate approach

An organisation asks for coaching because several managers are missing deadlines. The request is clear about the preferred intervention and vague about the problem. Before accepting it, ask for a recent example. What work was late? What was the expected standard? Who had authority over the resources? What did the manager know at the time? What else changed? An answer to those questions may support coaching, but it may also reveal an unrealistic plan, a missing technical skill or a broken handover.

The purpose of selection is to match the developmental response to the need. It is not to prove that your preferred method belongs. HR Delivery places that responsibility in 6A Align and Assess and, for mentoring, in MENTOR's Mandate & Mobilise and Evidence & Engineer stages. [2] [3]

Turn a broad request into a work question

Replace 'be more strategic' with the decision or behaviour that is not yet working. A manager may need to compare alternatives before approving expenditure, explain priorities to a team or stop accepting work without checking

capacity. Each has different evidence and learning requirements. A useful formulation names a situation, a required contribution and an observed difficulty.

For example: 'When two departments request urgent support at the same time, the manager commits to both without clarifying priority or available capacity.' This is more actionable than 'lacks confidence' or 'needs presence'. It also creates room for counterevidence. Perhaps the manager is following a senior leader's instruction never to refuse a request. A development plan that ignores that instruction would be unfair and unlikely to help.

Ask the participant how they understand the issue before agreeing the sponsor's interpretation. Differences are not obstacles to remove quickly. They may reveal competing expectations, missing information or a poorly specified role. Record the points of agreement and the points that need checking. The aim of the first meeting is a sufficiently useful hypothesis, not a definitive account of the person.

Use a person-role-system view

The person lens considers knowledge, habits, confidence, goals, preferences, experience and the way the participant interprets the situation. The role lens considers outcomes, authority, standards, interfaces and the demands of the particular work. The system lens considers priorities, incentives, resources, culture, technology and the behaviour of other stakeholders. HR Delivery's coaching source uses this contextual approach to avoid locating every problem inside the individual. ^[2]

Consider a fictional service manager who repeatedly delays a difficult customer conversation. The person lens suggests discomfort with challenge. The role lens reveals that the manager can discuss service standards but cannot approve the remedy the customer is likely to request. The system lens reveals inconsistent messages from Sales and Operations. Coaching may help the manager prepare and communicate, but an authorised remedy and a common organisational position are also required.

A useful evidence record has three columns: what is known; what is inferred; and what needs checking. 'The customer called three times' is an observation if supported by a record. 'The manager avoids conflict' is an interpretation. 'The manager is afraid of losing the account' is a hypothesis until explored. These distinctions help the practitioner remain

curious and make later correction possible.

Compare credible alternatives

Coaching is a strong candidate when the participant has enough relevant knowledge to explore options, has meaningful discretion and can test a different approach. It may also help a person prepare to obtain the support or authority they need. Mentoring is a strong candidate when access to relevant experience, professional context or developmental connections is central to the need. Neither option requires an exclusive relationship for every aspect of development.

Instruction and supervised practice are usually more appropriate when a person needs to learn a defined technical task. Clear management direction is necessary when the required action is not discretionary or a standard must be enforced. Work redesign may be needed when recurring demands exceed capacity or responsibility is disconnected from authority. A formal procedure may be needed for allegations, serious conduct concerns or employment decisions. These are practical selection distinctions, not a ranking of which intervention is more sophisticated.

A blended response can be coherent. The fictional manager Bilal might receive two budget training sessions, practise with a Finance colleague and use coaching to prepare for challenging an unrealistic

assumption in the next planning meeting. The services have separate purposes. The coach does not mark the budget competence, and the trainer does not receive private coaching notes.

For mentoring, choose one primary BRIDGE purpose. A new-role programme might be classified as Role Transitions, with professional networks as a secondary benefit. A retirement-related initiative might be Generational Knowledge, with readiness measured through successful teach-back and work coverage rather than the number of meetings. Record secondary expectations so they do not quietly become additional obligations. ^[3]

Select assessments proportionately

An assessment is useful when it answers a specific question that matters to the development decision. It should not be the price of admission to every coaching relationship. Begin with the goal and existing evidence. Ask what an instrument would add, what burden it creates, who is qualified to interpret it and how the result will be used. The ITC's test-use guidance places intended use, user competence, participant rights and context at the centre of responsible practice. ^[19]

HR Delivery's Leadership Preference Profile can support a discussion about where a leader naturally directs attention across the 3D9C contribution landscape. Leadership 360 Feedback concerns how observable behaviour is experienced by

different rater groups. Leadership Situational Judgement concerns choices in specified scenarios. These are different kinds of evidence. A preference is not an observed capability, and a scenario choice is not proof of consistent workplace behaviour. ^[6]

The Work Styles Indicator, Conflict Response Assessment and Learning Preference Questionnaire can provide language for exploring working habits, conflict choices and preferred ways of learning. Use the relevant authorised report and its boundaries. A learning preference should broaden the design of practice, not confine the participant to one teaching method. A conflict preference should invite examination of context, not become a label that excuses an ineffective response. ^[6]

For a leadership impact question, AC07 Leadership Discovery combines Leadership 360, Emotional Intelligence Assessment and Shadow Self Assessment. The combination can create useful questions about experienced impact and pressure patterns, but it should not be assumed that one result causes another. For a broad manager-development question, AC05 combines MMAC, MSJ and 5D16F. Preserve their distinct meaning; do not average them into a coaching readiness or personality-worth score. ^[6]

Assessment selection also requires a language decision. A translated instrument is not automatically equivalent to its source-language version. Confirm

the intended population, instructions, scoring and evidence for the version used. In a multilingual Gulf organisation, it may be more useful to begin with a supported work example in the participant's preferred working language than to administer an instrument whose interpretation has not been established. That is an assessment-design question, not a judgement about nationality.^[20]

What research supports, and what it does not

Jones, Woods and Guillaume's meta-analysis found positive average learning and performance effects for workplace coaching, but its 17 studies excluded manager-subordinate and peer coaching. It therefore cannot simply be used as evidence that any line manager who asks coaching questions will improve

team performance. The review supports a reason to consider coaching while leaving important questions about local purpose, implementation and transfer.^[16]

Allen and colleagues' mentoring meta-analysis found generally supportive associations with career outcomes, with small effects for objective outcomes. This is not a promise that a formal mentoring match produces promotion or higher pay. The type of mentoring, participant selection and organisational opportunity all matter to interpretation. In this book, programme outcomes are therefore framed as hypotheses to examine rather than benefits to announce in advance.^[17]

The practical implication is neither scepticism about every developmental relationship nor confidence that any programme will work. It is to make the intended mechanism visible. If a mentor is

expected to improve a specialist's judgement, specify the exposure, discussion, practice and feedback through which that might happen. If coaching is expected to improve delegation, identify the decisions the participant will make differently and the support needed to sustain them.

A fit conversation you can use

Start by asking the participant to describe one situation they would like to handle differently. Ask what they have already tried and what has helped, even partially. Explore what they know, what they can decide and what depends on others. Then ask what kind of support they believe would be useful. Listen for a preference without treating it as the only relevant consideration.

Explain the alternatives in ordinary language: 'A coach would help you examine your approach and test a different one. A mentor could offer relevant experience and connections. A trainer could teach the process. Your manager may need to clarify the authority or resources. We may use more than one route, but we should be clear about the job each is doing.'

Finish with an explicit decision: proceed with a bounded engagement; obtain missing information; provide a different intervention; combine specified forms of support; or decline the request with a reason and an appropriate next route. Write the decision in a short record the participant can understand. Selection is complete when the purpose and conditions are clear enough to begin responsibly, not when a booking has been made.



A coaching request can reveal a management or system problem. Investigate before prescribing.

CHAPTER 03 / AGREE

Contracting for a trustworthy relationship

A contract is a shared understanding of how the relationship will work. It is not merely a form signed before the first meaningful conversation. The important test is whether each person could explain the purpose, the responsibilities, the information boundaries and the route for changing or ending the arrangement in similar terms.

The publishing brief requests a three-way contract involving participant, practitioner and sponsor. HR Delivery's published 6A system uses a four-way contract that also makes the programme owner's responsibilities explicit. This book supplies the three-way relationship agreement and a programme-owner annex, so the combined arrangement preserves the full four-party architecture rather than silently dropping an organisational responsibility. ^[2] ^[33]

Identify the parties and their interests

The participant brings the development goal, relevant experience and a decision about their own action. The coach or mentor brings an agreed service within their competence. The sponsor may fund the work, clarify the organisational purpose and provide workplace

opportunity. The programme owner arranges access, matching, administration, safeguards, practitioner support and evaluation. One person can hold more than one organisational role, but the responsibilities should remain distinguishable.

A sponsor's interest is legitimate. An employer can reasonably ask whether a funded development programme is being delivered and whether it is useful. The difficulty arises when that interest is translated into an assumption that the sponsor owns private session content. The agreement must distinguish progress information that can be shared from conversation content that cannot ordinarily be shared. HR Delivery's source makes that separation central to 6A Agree. ^[2]

The ICF Code of Ethics requires clear agreements about roles, responsibilities, confidentiality and the exchange of information. It also addresses termination, conflicts, records and technology. Use the current code relevant to the practitioner and the applicable organisational and legal requirements; do not present a book template as a substitute for those obligations. ^[13]

Define a goal without deciding the answer

A sponsor might propose, 'The participant must become more collaborative.' The agreement should turn that into a work-related question without dictating a private psychological explanation. For example: 'The participant will develop a more dependable way to agree cross-team priorities, surface constraints and close commitments.' The participant may contribute a related goal: 'I want to challenge conflicting requests without damaging working relationships.'

Both can sit in the contract. The coach is not being asked to make the participant more agreeable to every request. Nor is the sponsor being asked to abandon legitimate service requirements. The shared purpose is a more effective way of working. Specific measures can be refined after a baseline discussion, provided the boundaries and initial purpose are clear.

Avoid goals that cannot be observed or are outside the participant's control. 'Be promoted by December' depends on vacancies, selection and other decisions. 'Build evidence of leading a cross-functional review at the agreed scope' is a development goal. 'Make everyone trust me' is too broad. 'Explain decisions, keep commitments and invite feedback after two important handovers' gives the person something they can practise.

Write the information protocol in plain language

State the information item, the recipient, the purpose, the timing and the method of sharing. For example: the programme owner receives attendance and scheduling information to manage delivery; the sponsor receives participant-agreed progress against goals at the midpoint and close; the coach retains minimum necessary session notes under an approved retention schedule; the participant chooses whether to share their own reflection with anyone else.

Do not rely on 'everything is confidential'. That sentence is usually too broad to be accurate and too vague to be useful. Explain the locally verified exceptions, such as a legal requirement or a serious safety concern, and the process for dealing with them. Where possible, the practitioner should discuss a necessary disclosure with the participant before it occurs, but must not promise to do so in every circumstance. The agreement should name the person or route for obtaining qualified advice.

Confidentiality and anonymity are different. A programme owner may know who is participating while not knowing what is discussed. An aggregate evaluation can still expose a person when a group is very small or a story is distinctive. Removing names does not automatically make a quotation safe to publish. Review the combination of

details, the audience and the potential consequences.

A fictional four-party agreement

Madar Facilities is a fictional Qatar-based service organisation. It has appointed 24 supervisors to new management responsibilities. One participant, Amal, has agreed to work on delegating weekly service planning. Her sponsor, the operations manager, wants fewer last-minute escalations. An internal coach, Reem, will support six sessions over four months. The learning manager is the programme owner.

The relationship agreement states that Amal will bring recent examples, choose a specific delegation experiment and seek feedback from the people involved. Reem will provide coaching within the agreed purpose, make any proposed change of role explicit and use supervision without identifying Amal unnecessarily. The sponsor will confirm decision authority, protect practice time and avoid taking work back without explanation. The programme owner will manage access, matching, concerns, records and evaluation.

The sponsor receives a short midpoint and closure summary prepared with Amal. It reports the agreed experiment, evidence of application, support still needed and the next action. It does not contain private session notes, personality interpretations or a recommendation about promotion.

Amal can share more of her own experience, but that choice is not treated as a condition of continued support.

The contract also states what happens if the sponsor's priorities change, Reem discovers a conflict of interest or Amal wants to stop. A review can revise the goal, change the coach, pause the engagement or close it. The programme owner has a safe concern route outside the direct reporting relationship. The exact employment, privacy and safeguarding provisions require local approval before the template is used.

Contracting is also a conversation about power

A participant may agree to coaching because declining appears risky. A mentor may be influential in future appointments. An internal coach may also work in HR. These facts do not always make the relationship impossible, but they change the questions that need to be asked. What does voluntary participation mean in this setting? What information could affect an employment decision? Can the participant request another practitioner without disadvantage?

Ask those questions before making reassuring statements about trust. A line manager using coaching skills should be especially clear: 'I am still your manager and I remain responsible for the performance decision. In this part of the conversation, I would like to help you explore how to meet the agreed standard.'

You do not need to discuss personal matters that are not relevant to the work.'

The participant should not have to infer when the manager has switched from inquiry to direction. A clear transition might be: 'We have explored the options. This part is a management decision: the customer update must be issued today. Let us agree what support you need to do it accurately.' Such clarity can be more respectful than asking questions until the employee guesses the required answer.

Digital arrangements belong in the agreement

Agree the platform, location, recording policy and access arrangements. A remote session needs a private setting at both ends, not simply a functioning connection. Discuss whether the participant can be overheard, whether shared calendars reveal sensitive information and how

interruptions will be handled. A quiet room may need to be provided for a shift-based employee who does not work at a desk.

Recording, automated transcription and AI summaries require a separate decision. Do not enable them by default because a platform offers the feature. Establish necessity, permissions, data handling, access, retention and a workable alternative. A participant who does not want a recording should not be assumed to be less committed to learning. The book's practical default is to use the minimum information necessary and to avoid automated processing of sensitive session content unless the organisation has explicitly approved the purpose and safeguards. This is a recommended design choice, not a claim about a universal legal rule.

A mentor's email introduction also creates data. Agree what can be said, why the introduction is useful and whether the mentee wants it. 'I will introduce you as someone seeking to learn about the procurement interface' is different from disclosing that the mentee is being considered for a confidential future role. Small communications can carry significant implications.

Review, repair and close the agreement

At the start of a session, check whether the purpose or conditions have changed. This need not become a lengthy re-contracting exercise. 'Is there anything about the work or our agreement that we should revisit before we begin?' can identify a new reporting line, an employment process or a change in the participant's goal.

When a sponsor asks for information outside the agreement, do not improvise a private exception. Restate the agreed boundary, explain what useful information can be provided and involve the programme owner where necessary. When the participant requests a different kind of help, consider whether it fits the practitioner's competence and the existing purpose. A new need may require a different service rather than an expanded informal promise.

A trustworthy contract is specific enough to guide difficult moments and flexible enough to be revised openly. Use Resource C03 to prepare the relationship agreement and the programme-owner annex. Before the first session, ask each party to explain what they will receive and what they will not receive. Any important difference is a reason for another conversation, not a reason to rush the signature.



Funding a relationship does not give the sponsor ownership of private session content.



02

Practise with purpose

Read the explanations, examine the worked decisions and apply the method to a real, appropriately bounded situation.

Chapter 04 / Listening, questioning and reflection

Chapter 05 / Working with goals and action

Chapter 06 / Using feedback and challenge

CHAPTER 04 / ACTIVATE

Listening, questioning and reflection

Listening is not the pause before the practitioner delivers an insight. It is the work of understanding what the person is describing, how they interpret it and what remains uncertain. Good listening helps a participant hear their own thinking more clearly. It also helps the practitioner avoid solving the wrong problem with confidence.

This chapter treats listening and questioning as skills to practise, not as personality traits. The examples are original fictional conversations. They illustrate choices within 6A Activate and RELATE Listen & Learn; they are not a universal session script or a scoring key for professional accreditation.^{[2] [3]}

Listen for events, meaning and context

An event is what happened: a meeting ended without a decision. Meaning is the participant's interpretation: 'They do not respect my role.' Context includes who was present, what authority was available, what information was missing and what had happened before. A useful conversation moves among these without treating one as the whole explanation.

Ask for a sufficiently recent and specific example. 'Tell me about the last time this happened' is often more useful than 'Why are you always reluctant to challenge?' The second question assumes a stable pattern and places the person on the defensive. The first creates an opportunity to examine the actual work.

Reflect the distinction back: 'You asked for a decision, the group deferred it, and you interpreted that as a lack of confidence in your role. Have I understood the sequence?' This does not endorse the interpretation. It shows that the practitioner has heard it and makes it available for examination.

Use questions with a clear purpose

An opening question gives the participant room to define the issue. A clarifying question establishes a fact or meaning. An exploring question expands the possibilities. A challenging question tests an assumption or consequence. An action question helps the person choose and prepare a next step. None is inherently superior; usefulness depends on the moment.

A short factual question can be excellent coaching: 'Who had the authority to approve that?' A long open question can be unhelpful if it hides the practitioner's preferred answer. Avoid asking three questions at once. The participant will often answer the easiest or most recent one, leaving the practitioner uncertain about what has actually been explored.

The question 'What else?' can create space, but repeated mechanically it can feel like a test with an undisclosed answer. The question 'Why?' can be valuable, but may sound accusatory in a difficult conversation. A more precise alternative is often available: 'What led you to choose that approach?' or 'Which risk were you trying to avoid?'

An annotated coaching conversation

Context. Amal, the fictional new manager at Madar Facilities, says she cannot delegate the weekly service plan because the team will make mistakes. The coach has an agreed developmental role. The conversation below is an excerpt, not the whole session.

Amal: 'I know I should let them do it, but if I do not check everything, the plan will be wrong.'

Coach: 'Could we look at the most recent plan you took back? What was happening at that point?'

Amal: 'It was Thursday afternoon. Two people had not confirmed their availability. I was worried we would miss the deadline.'

Coach: 'So the immediate problem was missing availability information. What had you agreed with the planner about handling that?'

Amal: 'I told him to ask everyone. I did not say when he should escalate a missing reply.'

Coach: 'What does that change in your view of the problem?'

Amal: 'Perhaps I had not delegated the whole process. I had delegated the task and kept the judgement about exceptions.'

Coach: 'That seems an important distinction. What would a complete delegation need to include next week?'

Amal: 'A deadline for replies, a point for escalation and what he can decide himself. I also need to stop asking for updates every hour.'

Coach: 'What are you concerned might happen if you do that?'

Amal: 'If he gets it wrong, I will still be accountable. I do not want to look careless.'

Coach: 'You want to protect the service and your accountability. How could you keep those safeguards without taking the work back automatically?'

Amal: 'We could agree one review at noon, with exceptions brought earlier. I would check the risks, not rebuild the whole plan.'

Coach: 'What would you need from your own manager to make that experiment workable?'

Amal: 'Agreement that the planner can make the routine substitutions. At the moment people come straight to me.'

Coach: 'What is your next step, and what will you look for to decide whether the experiment helped?'

Amal: 'I will confirm the authority on Sunday, brief the planner and review the next two cycles. I will record exceptions, rework and how often I take the task back.'

Why those choices matter

The coach begins with a recent event rather than debating Amal's general belief about the team. The questions establish what had actually been delegated. The conversation then moves to the meaning Amal gives to accountability and the organisational conditions needed for a different response. The final action includes both a personal practice and a sponsor decision.

The coach does not tell Amal that her concern is irrational. Some errors could be consequential, and the manager remains

accountable for the process. The developmental question is how to create proportionate safeguards. The experiment is bounded to two cycles, with evidence that can challenge the initial plan.

Notice the reflection 'That seems an important distinction.' It recognises the participant's insight without praising a personality trait or presenting the coach as the source of the answer. An alternative would be to ask Amal to explain the distinction further. The exact words are less important than the function they serve.

Reflect without claiming to know the person better than they do

A reflection should be offered as a checkable observation: 'I notice you describe three possible risks, but only one possible benefit.' That is more useful than 'You are risk-averse.' The first statement is grounded in the conversation. The second may be a broad label unsupported by the available evidence.

A summary can also reveal a tension. 'You want your team to take more responsibility, and you also want to approve every exception before they act.' The practitioner should leave space for the participant to correct or qualify the summary. Perhaps approval is genuinely required in one part of the work. The goal

is shared understanding, not a clever contradiction.

Do not infer feelings from nationality, seniority, silence or eye contact. Ask about the experience. In a multilingual conversation, a pause may mean that the participant is choosing words, not resisting the question. Offer time, written reflection or a different phrasing. Where interpretation is needed, agree a consistent and confidential arrangement rather than relying casually on a colleague.

Use silence deliberately

Silence can give a participant time to think. It can also feel uncomfortable or unclear. A brief explanation helps: 'Take a moment; there is no need to answer quickly.' Watch whether the pause is useful rather than measuring it against an ideal duration.

The practitioner may feel pressure to fill every gap because the organisation is paying for the session. That pressure can lead to unnecessary advice. A good question followed by space may be more productive than several additional questions that change the subject. Equally, silence should not be used as a technique to force disclosure. The participant can choose not to explore a topic.

Practise one skill at a time

In a practice triad, give one person the practitioner role, one a fictional participant brief and one an observation task. For the first round, the observer records only whether the practitioner separates events from interpretations. For the second, they record the purpose of each question. For the third, they notice whether the action belongs to the participant and includes the necessary conditions.

This narrow focus produces more usable feedback than asking an observer to judge whether the conversation was 'good'. Use exact examples: 'You asked what had been agreed before suggesting a solution.' Avoid general scores about warmth or talent. A brief practice conversation cannot establish professional competence, but it can identify a specific skill worth rehearsing.

Finish by repeating a short part of the conversation with one change. Reflection without another attempt can remain abstract. The next workplace step might be to use one clarifying question before offering advice, or to summarise the participant's interpretation and ask whether it is accurate. Keep the experiment small enough to notice and important enough to matter.



Listen for the meaning the person is making, not only the next question you want to ask.

Working with goals and action

A conversation can feel valuable and still leave the person unsure what to do on Tuesday. The answer is not to force every insight into a rigid action list. It is to make a deliberate connection between what has been understood, what the person wishes to change and the next situation in which that change could be tried. In the 6A system, Assess establishes the goal and baseline; Activate expands awareness and choice; Apply takes learning into work. These are connected responsibilities, not three unrelated forms. ^[2]

Start with a real episode. A goal such as 'be more influential' becomes more useful when the person describes a decision they need to influence, the colleagues involved and the effect they are trying to achieve. The coach need not accept the first formulation. Sometimes 'influence' means making a clearer case. Sometimes it means listening earlier. Sometimes it means recognising that the decision is not theirs to make.

A goal belongs to a person in a system

Amal, the fictional supervisor introduced earlier, initially says she wants to stop taking delegated work back. A narrow goal might be 'delegate more tasks'. That could encourage her to transfer work indiscriminately. A more useful goal is to

make the weekly service plan reliably owned by the coordinator, with agreed authority, timely access to information and a proportionate review. Amal's behaviour matters, but so do the coordinator's skills and the availability information supplied by other teams.

Coach and coachee therefore distinguish three things. The desired work outcome is a dependable weekly plan. The behavioural change is Amal's clearer delegation and restraint from unnecessary intervention. The enabling condition is timely information and an escalation route for unresolved constraints. Coaching can help Amal practise the behaviour. It cannot, by itself, make another department release information or authorise a change to staffing rules.

This separation prevents unfair evaluation. If Amal follows the new delegation agreement but the scheduling system fails, the experiment has not proved that she cannot delegate. Equally, if a colleague quietly rescues the plan, a completed output does not prove that her new approach worked. Review both the behaviour and the circumstances that produced the result.

Build a goal that can guide a choice

A practical goal statement describes the situation, the behaviour or capability to develop, the intended contribution and the evidence to review. For example: 'Over the next four weekly planning cycles, I will agree the coordinator's decision boundaries before work starts, use the scheduled checkpoint rather than rewriting the plan, and review whether routine issues are resolved without avoidable escalation.' This is an original teaching example, not a mandatory wording formula.

The statement leaves room for judgement. Amal may need to intervene if there is a safety issue, a material service risk or an authority boundary is crossed. The goal should not reward non-intervention regardless of consequences. An accompanying boundary states which events require immediate escalation and who decides. Good development goals make the desired behaviour clearer without asking people to suspend their responsibilities.

Ask whether the goal is sufficiently under the participant's influence. 'Get my director to trust me' depends on another person's judgement. 'Provide the director with a clear decision paper, including uncertainties and requested authority, and invite feedback on what is missing' describes an action the participant can take. The relationship may improve, but

that remains an outcome to observe rather than a result to guarantee.

Establish a baseline without building a surveillance system

A baseline is an account of the starting position. It may be a small sample of work, a participant's specific examples, an agreed observation or a limited operational measure. It is not necessarily a test score. For Amal, the baseline could be the previous four planning cycles: who completed the draft, when information arrived, which decisions were escalated and when she took the work back.

The baseline should be collected for the agreed purpose, with appropriate permission. A coach should not quietly inspect private messages or request a manager's unofficial assessment file. The programme owner should not use a development baseline as a covert disciplinary record. Identify who owns each source, what may be shared and what will be retained. The information protocol from Chapter 3 applies to measurement as well as conversation. ^[2]
^[13]

Where the baseline is mainly self-report, say so. A person can provide valuable insight into their experience without that account becoming an independently verified performance measure. Where observations are limited, record the limitation. A modest, honest baseline is more useful than a precise-looking number whose origin nobody can explain.

Turn an insight into an informative experiment

An experiment should test a proposition, not simply demonstrate compliance with the coach's advice. Amal's proposition is: 'When the coordinator knows the decision boundary and has a planned checkpoint, I can remain available without becoming the default owner of the task.' The experiment is to use one explicit delegation agreement for two weekly cycles. The evidence is the plan, a brief review with the coordinator and a record of interventions and their reasons.

The experiment must be safe enough for the setting. Do not use a critical incident as an unsupervised practice opportunity. A manager can rehearse a difficult conversation before conducting it; a technical specialist may practise under authorised supervision; a leader can trial a revised decision meeting on a bounded project. A development assignment is not permission to expose other people to avoidable risk.

Agree the smallest useful change. Someone who plans to improve listening, delegation, conflict, strategy and wellbeing simultaneously may be unable to distinguish what helped. One specific practice, repeated across several relevant situations, often provides clearer learning. This is a design recommendation, not a claim that one action is always the optimum number.

Plan for friction before it arrives

Ask, 'What is most likely to make this difficult in the actual working week?' The answer may be workload, a familiar emotional trigger, a senior stakeholder, missing data or an unclear decision right. Design a response while the person has room to think. Amal expects to intervene when the coordinator is slow to answer. Her plan is to ask what is blocking progress and check whether the agreed escalation threshold has been reached before taking over.

A practical cue can help: 'When I receive a late update, I will first ask what decision is needed and who has authority to make it.' The cue is an aid to deliberate practice, not a promise that behaviour becomes automatic. If the situation is materially different, the participant should adapt rather than follow a sentence mechanically.

Support is part of the plan. Who will release time? Who will provide feedback? Who can resolve a system barrier? A sponsor's most useful contribution may be authorising the participant to make a bounded decision, not attending another progress meeting. In the 6A approach, the manager ecosystem and organisational conditions are enablers of application. They should be designed into the engagement rather than blamed after transfer fails. ^[2]

Review behaviour, result and explanation separately

At the next session, begin with what happened. Ask for a concrete example before evaluating success. What did the participant do? What did others do? What changed in the work? Which planned conditions were present? Which were absent? Then explore what the participant learned and what alternative explanations remain.

Suppose Amal did not rewrite either of the next two plans. One plan was completed on time, while the other was delayed by a supplier confirmation. She reports feeling less anxious. The coach can recognise progress in restraint and clarity without claiming that coaching improved service performance. The second cycle may reveal a supplier dependency that needs a different response. Learning includes discovering that the initial problem was only partly personal.

The review may lead to continuing, adapting, increasing the challenge or stopping. An experiment that produces no useful information should not be repeated

simply because it appears in the original plan. An experiment that works in a quiet week should be tested thoughtfully under normal variation before it is described as a dependable new habit.

Use goal scales carefully

A simple goal-attainment scale can make expectations discussable. Define levels in advance using observable differences. For a delegation goal, the middle level might describe clear authority, agreed checkpoints and timely escalation in the planned cycles. A lower level might describe continued ambiguity or repeated take-back without explanation. A higher level might describe the same quality maintained in a more demanding but authorised situation.

Do not turn these locally defined levels into a universal psychometric score. Different goals have different difficulty, opportunity and consequence. A participant with a difficult goal and modest progress may have learned more than someone who easily exceeds an undemanding target. Report the goal,

baseline, evidence and context with any rating. Avoid adding unrelated goal scores into a league table of coaching effectiveness.^[2]

The working resources later in the book provide a goal-and-experiment record. It is deliberately brief enough to use after a conversation. Its purpose is to preserve the logic of the experiment, not to make the participant document every thought.

A worked review conversation

Reem: 'What did you notice in the two planning cycles?'

Amal: 'I stayed out of the detail in the first one. In the second, I nearly took over because the supplier had not confirmed availability.'

Reem: 'What did you do instead?'

Amal: 'I asked which decision the coordinator could make without the confirmation. We agreed the options and the point at which I would escalate.'

Reem: 'What does that tell you about the original belief that you have to take back the work when it is late?'

Amal: 'Sometimes I need to remove a barrier, not become the planner.'

Reem: 'What would be a useful next test, and what support would make it fair to the coordinator?'

The coach does not supply a triumphant interpretation. She helps Amal distinguish a changed behaviour from a solved system. The participant's next action might be to agree supplier-response expectations with the relevant owner. That is progress beyond the original conversation, not a failure of coaching to remain inside a personal topic.

Your practice task

Choose one development goal and rewrite it around a real situation. State the behaviour, contribution, evidence and boundary. Then identify one system condition and one person whose support will matter. Finally, write what would cause you to revise the experiment. A useful answer should make it possible to learn even if the hoped-for result does not occur.



A useful insight needs an opportunity, support and evidence in actual work.

CHAPTER 06 / SUPPORT WITHOUT AVOIDING DIFFICULTY

Using feedback and challenge

Warmth and challenge are not opposites. A developmental relationship can be respectful while examining an uncomfortable gap between intention and impact. The challenge is to make the gap discussable without claiming more authority than the evidence supports. A coach is not entitled to diagnose a person's character because a report contains an unfavourable score. A mentor is not entitled to dismiss a different approach because it is unlike their own.

Feedback is information offered for a purpose. Before giving it, ask what the person is trying to learn and whether the information is relevant to that purpose. A detailed critique of presentation style may be unhelpful when the actual issue is an unclear investment case. An observation about interrupted colleagues may be useful when the goal concerns shared decision-making. Relevance makes challenge more precise and less personal.

Separate observation from interpretation

'You interrupted the colleague three times before they completed their explanation' is an observation, assuming it was actually witnessed and recorded accurately. 'You do not respect people' is an interpretation of motive and character. The second

statement may close the conversation before the first can be examined.

Offer the observation, explain why it matters to the agreed goal and invite the participant's account. You might say, 'In the rehearsal, I noticed three interruptions while the colleague described the risk. We are working on how you invite challenge. What was happening for you at those moments?' This leaves room for explanations without making the behaviour disappear. The person may have been anxious about time, concerned about accuracy or unaware of the effect.

The same discipline applies to positive feedback. 'You asked the analyst to explain the uncertainty before the group chose an option' is more useful than 'You are a natural leader'. It identifies a repeatable contribution. Labels can be flattering and still make learning less clear.

Ask permission without making truth optional

In a coaching relationship, asking whether the person is ready to hear an observation can support agency and timing. It does not mean withholding every difficult point indefinitely. The coach can explain that examining the observation may be important to the agreed purpose and ask

how to approach it productively. If a participant repeatedly declines any relevant feedback, the relationship may need a review of goals and suitability.

A line manager has a different responsibility. They may need to communicate a required standard or address a formal concern. They should not disguise that responsibility as an optional coaching question. 'I need to explain a performance concern first; afterwards we can explore how you want to respond' is clearer than asking the employee to discover the manager's predetermined conclusion.

The source coaching method emphasises explicit mode switching. The practitioner should know when they are coaching, advising, instructing, assessing or exercising management authority. The other person should know too. ^[2]

Work with assessment feedback as a hypothesis

A report can provide a starting point, but the interpretation depends on what the instrument measures. LPP describes preference across leadership contributions. LSJ concerns judgement in presented scenarios. Leadership 360 describes how selected colleagues rate observable behaviour. These sources can differ without one being wrong. A leader may prefer strategic work, recognise sound people-development choices in scenarios and still be experienced as unavailable by direct reports. ^{[6] [12]}

That pattern invites inquiry: when is the leader available, which demands compete, what support do colleagues need and what behaviour would make a difference? It does not justify a combined label such as 'low empathy leader'. The report's scale, population, language and intended use must be understood before discussing implications. Where technical information is unavailable, limit the inference and obtain the authorised guidance. ^{[19] [20]}

With a multi-source report, protect the reporting design. Do not ask the participant to identify who gave a low rating. Do not infer that a small anonymous group is impossible to identify. Explain the source tool's privacy threshold and the additional care needed in a close-knit team. A request for examples should not become an investigation into respondents.

An annotated feedback exchange

Coach: 'Your self-rating suggests that you usually invite disagreement. The aggregate peer feedback is lower. The report does not tell us why. Which recent decision meeting would be useful to examine?'

Leader: 'The budget meeting. I asked for objections, but nobody raised any until afterwards.'

Coach: 'What had happened before you asked?'

Leader: 'I had already said which option I preferred and that we needed to finish quickly.'

Coach: 'What might colleagues have understood from that sequence?'

Leader: 'That the question was formal rather than genuine.'

Coach: 'How could you test a different sequence without pretending you have no view?'

The coach keeps the numerical difference in proportion. The source of learning is the exploration of a relevant episode and a possible new practice. The participant could circulate options before stating a preference, invite written concerns or ask a colleague to examine risks. None is automatically the right answer; the choice depends on decision urgency, group size and the actual authority involved.

Challenge the story, not the person's worth

People organise experience into stories: 'My team resists change', 'The executive committee only respects certainty', or 'If I do not check everything, quality will fail'. A coach can ask what supports the story, what contradicts it and where it is less true. A mentor can add a different example from experience while making its context explicit.

Avoid arguing the participant out of their interpretation. The purpose is to increase the quality of thinking, not to win a debate. Ask for exceptions, missing

perspectives and consequences. 'Who might describe this situation differently?' often opens more useful inquiry than 'That is a limiting belief'. The latter may simply replace the participant's unexplored label with the coach's.

A practical challenge can be direct: 'You say you want greater delegation, yet your proposed plan keeps every approval with you. How do those two choices fit together?' The question is demanding because it is specific. It does not require an accusation about control or trust.

Offer mentor advice with conditions attached

An experienced mentor can say, 'In a similar programme, we separated the technical approval from the commercial decision. That reduced delay, but it only worked because the authority boundaries were documented. Which parts of that situation resemble yours, and which do not?' This is advice with a transfer test.

The mentee should not have to flatter the mentor by adopting the suggestion. Ask them to compare it with another option and explain their choice. Where the mentor's experience is dated, sector-specific or drawn from a different country, name the limitation. Expertise becomes more credible when its boundary is visible.

A mentor who is also an influential sponsor must distinguish offering advice from using authority on the mentee's behalf. An introduction, nomination or

endorsement can materially affect opportunity. Discuss permission, fairness and conflicts before acting. The relationship agreement should make these possibilities explicit rather than treating every helpful contact as harmless. [3] [14]

Attend to emotional responses without becoming a therapist

A participant may feel embarrassed, angry or disappointed when feedback challenges their self-view. Allow time. Ask what they have heard and what needs clarification. Check whether they want to pause, consider one part of the evidence or return after reflection. Do not interpret distress as resistance that must be broken through.

Stay within the developmental purpose and your competence. You can acknowledge emotion and ask what support would help the person continue safely. You should not diagnose a mental health condition, explore traumatic experiences without appropriate competence or promise to treat distress through coaching. Where a specialist referral is needed, explain the boundary

respectfully and use the organisation's verified support routes. Urgent safety concerns require the relevant emergency or safeguarding response, not a delayed coaching exercise.

The distinction is not that emotion is forbidden. Work and identity often carry emotion. The distinction is between supporting a person to reflect on work and taking responsibility for clinical assessment or treatment. The source methods and professional codes require practitioners to recognise their limits. [2] [13] [14]

Make challenge proportionate to trust and purpose

A new relationship may need more explicit explanation of how feedback will be used. An established relationship may tolerate a shorter, more direct challenge. Neither justifies humiliating the participant. Public confrontation, surprise disclosure of private feedback or pressure to reveal personal material can undermine the conditions for learning.

Consider status differences. A junior employee may agree with a senior mentor even when the advice is impractical. A new manager may interpret an internal coach's

challenge as a message from HR. Ask how the person understands your role and what it would be like to disagree with you. These are useful questions in any organisation; do not assume the answer from nationality, gender or seniority alone.

Language also affects the experience of challenge. A phrase intended as concise may sound abrupt in a second language. Use concrete descriptions, allow clarification and avoid idioms whose meaning is uncertain. For bilingual programmes, test the feedback language with intended users rather than assuming a literal translation carries the same tone.

Close the loop after feedback

Feedback has value when the person can use it. Agree one behaviour to practise, the setting, the support and the evidence to revisit. A leader working on inviting challenge might ask a colleague to observe the sequence of the next two decision meetings. The observer records what happened, not whether the leader is now 'authentic'.

A review of multi-source feedback studies found that subsequent improvements in ratings were generally small. That

cautions against treating delivery of a report as a development intervention in itself. The practical response is to provide interpretation, opportunity, practice and follow-up while remaining honest about attribution. ^[26]

At the next conversation, ask what changed and what did not. If the new behaviour had an unintended effect, examine it. A leader may invite extensive debate but fail to close decisions. The next practice may be to combine genuine challenge with a clear decision rule. Development often involves balancing useful behaviours, not simply increasing one of them.

Your practice task

Rewrite three pieces of feedback: one vague criticism, one flattering label and one assessment interpretation. For each, identify the actual source, the relevant behaviour, the uncertainty and a question that invites the participant's perspective. Then add a possible workplace experiment. A strong answer should preserve the difficult information while removing unsupported claims about motive or identity.



Challenge should expand understanding without taking away the other person's agency.



03

Build the programme

Read the explanations, examine the worked decisions and apply the method to a real, appropriately bounded situation.

Chapter 07 / Mentoring through experience

Chapter 08 / Ethics and difficult situations

Chapter 09 / Designing an organisational programme

CHAPTER 07 / PERSPECTIVE, CONNECTION AND INDEPENDENCE

Mentoring through experience

A mentor's experience is useful when it helps another person understand options they could not yet see. It becomes less useful when the mentor's career becomes the template everyone is expected to follow. The mentee may work in a different profession, face different constraints or want a different kind of contribution. A good mentoring relationship gives them access to perspective without taking ownership of their future.

The HR Delivery mentoring architecture provides three separate reference points. MENTOR concerns the organisational system. BRIDGE identifies the programme's primary purpose. RELATE concerns the relationship itself. This chapter concentrates on RELATE while showing how purpose and governance shape the conversation.^[3]

Choose a purpose that explains the relationship

BRIDGE offers six programme purposes: Business Capability; Role Transitions; Inclusion & Access; Development & Careers; Generational Knowledge; and Ecosystem & Engagement. These are alternatives for design, not a sequence that every mentee must complete. A programme can have secondary benefits, but one primary purpose helps define who

should participate, what mentor experience matters and what evidence will be useful.^[3]

A role-transition relationship may help a newly appointed manager understand decision boundaries and stakeholder expectations. A generational-knowledge relationship may help a specialist learn how an experienced colleague recognises unusual faults. An inclusion-and-access programme may address unequal access to professional networks. Their matching criteria and evaluation should differ.

A vague purpose such as 'share wisdom' makes it difficult to judge suitability. What wisdom, relevant to which work, and available from whom? Ask the sponsor and intended participants to describe a situation in which mentoring would make a practical difference. Their answers may reveal a need for technical instruction, a community of practice or fairer allocation of assignments instead.

Readiness and rapport are more than chemistry

RELATE begins with Readiness & Rapport. Both parties need a reason to participate, a realistic time commitment and an understanding of the relationship. A pleasant introductory meeting does not establish all three. Discuss what each

person hopes to contribute, what they cannot offer and what conditions would make the relationship difficult.

For the mentee, readiness may include a broad development question rather than a polished career plan. Do not require confident self-promotion as the price of access. Help people describe the work they want to understand and the experience they hope to gain. For the mentor, readiness includes willingness to listen, reflect on the limits of their experience and make time consistently.

Rapport can grow through useful work. A perfect personality match is neither necessary nor established by combining preference scores. Consider relevant experience, availability, language access, conflicts, power and the mentee's informed preferences. Offer a trial period and a dignified rematching route rather than treating the first allocation as permanent.

Expectations and ethics make freedom possible

Agree how often to meet, how to prepare, which topics are within scope, what may be shared and how either person can raise a concern. Clarify whether the mentor may introduce the mentee to colleagues, discuss opportunities with managers or provide an endorsement. Obtain specific permission before sharing personal career information or assessment results.

The mentor is not automatically the mentee's sponsor, assessor or advocate in a promotion process. Those roles may sometimes be appropriate, but they create additional responsibilities and conflicts. A mentor sitting on a selection panel should disclose the relationship and follow the organisation's conflict process. Private session information should not quietly become selection evidence.

Confidentiality has defined limits. The agreement should state applicable organisational and legal obligations, safety exceptions and the process for discussing disclosure where possible. Avoid both extremes: promising absolute secrecy and using a broad employer-interest clause that leaves the mentee with no meaningful protection.^[3]
^[14]

Listen and learn before offering a route

A mentee says, 'I need to become more visible.' The mentor might immediately recommend presenting to the executive team. First ask what visibility is expected to achieve. Does the mentee want access to a project, recognition for technical work, greater stakeholder understanding or confidence in speaking? Are there barriers in how work is allocated or credited?

Listening is not a preliminary courtesy before the mentor begins teaching. It determines whether the advice fits. Ask what the mentee has tried, what

happened and what they have already learned. Explore relevant work examples. A person who sounds uncertain may have substantial insight that has not yet been expressed in the organisation's preferred language.

The mentor can learn too. A reverse-mentoring arrangement may deliberately bring newer professional, digital or employee perspectives to a senior colleague. It still needs clear purpose, preparation, respectful challenge and protection from consequences for disagreement. Calling a programme reverse mentoring does not remove power differences.

Advise, challenge and connect with permission

RELATE explicitly includes advice. The point is not to imitate a coaching style in which the mentor avoids sharing knowledge. Offer experience in a form the mentee can examine: the context, the decision, the trade-off, what happened and what you would now do differently. Stories of uncertainty and revision often teach more than polished accounts of success.

Consider this original example. **Mentor:** 'When I first led a cross-site project, I treated the weekly report as the main coordination mechanism. It did not resolve disagreements about priorities. We later introduced a short decision meeting with clear authority. Your project

may be different. Which coordination problem are you actually trying to solve?'

The mentor has contributed a useful pattern without insisting on imitation. The mentee can compare it with their context. A challenge might follow: 'Your proposed plan asks three managers to approve the same decision. What would happen if they disagree?' A connection might be an introduction to someone who has managed a similar interface, made only after the mentee agrees what will be shared.

Make knowledge transfer observable

Some knowledge can be documented easily; some depends on judgement developed through experience. A retiring specialist may know which signals indicate a developing service failure, when to challenge a supplier's explanation or how to navigate an unusual approval. Asking them to 'write everything down' is rarely a sufficient plan.

Begin with critical situations. Observe the expert at work, ask them to explain cues and choices, and compare normal with exceptional cases. Let the learner attempt a suitable task, explain their reasoning and receive feedback. Record decision boundaries, sources and escalation routes as well as procedural steps. Verify understanding through a supervised demonstration, not just attendance at a handover session.

Mentoring can support this process, but technical sign-off remains with the authorised professional or operational owner. A mentor's encouragement does not confer a licence, credential or authority to perform regulated work. Where the assignment crosses entities or jurisdictions, confirm the applicable requirements before practice begins.

Translate the conversation into a chosen action

RELATE's Translate into Action stage asks what the mentee will do with the insight. The action may be a conversation, a work experiment, an observation, a reading task linked to a decision or a bounded assignment. The mentee should be able to explain why it matters and what they expect to learn.

Suppose Huda wants to understand regional partnership governance. Her mentor suggests observing a planning meeting and comparing the formal decision rights with the decisions actually made. Huda agrees to prepare three

questions, observe with permission and discuss discrepancies afterwards. This is more informative than simply shadowing a senior person for a day without a learning purpose.

The mentor should not create an unfair parallel route to opportunities. Where assignments are scarce, the programme owner should establish transparent allocation criteria. A relationship intended to improve access can inadvertently concentrate opportunity around already influential mentors. Review who receives introductions, stretch work and sponsorship, not only who has been matched.

Evaluate and evolve without creating dependency

Review the relationship at agreed intervals. Is the purpose still relevant? Are meetings occurring? Is the mentee applying learning? Is the mentor's experience still a good fit? Is another form of support now needed? The review

should allow the relationship to change or end without implying personal failure.

A mentee becoming less dependent on the mentor can be a positive outcome. They may develop a broader network, make decisions more confidently or know when to seek specialist advice. Do not define programme success as indefinite continuation of every pair. A purposeful ending can protect the value of what has been learned.

Record a closing summary owned by the mentee: useful insights, actions taken, remaining questions and future support. The programme owner receives the agreed evaluation information, not the private account of every conversation. An informal professional relationship may continue, but clarify that the formal programme and its reporting have ended.

A difficult mentoring moment

A mentor recommends that a talented specialist move into management. The mentee prefers a deeper technical career. An unhelpful response is to describe the

preference as lack of ambition. A more useful response is to explore the contribution the mentee wants to make, the organisation's actual career options and the requirements for a credible specialist pathway.

The mentor might say, 'I realise I have been assuming the route that worked for me is the route you should take. Let us compare the options against the work you want to do.' That acknowledgement models learning. It also protects a central boundary: mentoring expands informed choice; it does not require agreement with the mentor's definition of success.

Your practice task

Write a mentoring purpose using one primary BRIDGE category. Describe the experience the mentor needs, one likely power or conflict issue, and a first action that would make learning visible. Then write a sentence giving the mentee permission to decline advice or request a different match. Check that the programme can honour that permission in practice, not only on paper.



Share experience as a perspective to examine, not a career path to impose.

WORKED EXHIBIT

Three mentoring models, three different jobs

Model	Meaning and application
MENTOR / system	Mandate & Mobilise; Evidence & Engineer; Nominate & Match; Train & Contract; Operate & Assure; Review & Renew.
BRIDGE / primary purpose	Business Capability; Role Transitions; Inclusion & Access; Development & Careers; Generational Knowledge; Ecosystem & Engagement. Select one primary purpose rather than treating these as stages.
RELATE / relationship	Readiness & Rapport; Expectations & Ethics; Listen & Learn; Advise, Challenge & Connect; Translate into Action; Evaluate & Evolve.

Published HR Delivery mentoring terminology. Programme governance, purpose and relationship practice remain distinct.^[3]

CHAPTER 08 / PROTECT THE PERSON AND THE PURPOSE

Ethics and difficult situations

Ethical practice is not a paragraph signed at the beginning of a programme. It is the work of noticing when purpose, power, competence or information boundaries are becoming unclear and responding before trust is damaged. Many difficult situations begin with a reasonable request: a sponsor wants evidence of value, a coach wants a useful record, or a mentor wants to help a colleague obtain an opportunity. The ethical question is how that purpose is pursued and whose interests are affected.

The 6A quality lens is Ethical, Useful, Applied and Evidenced. None of these can compensate for the absence of another. A useful-looking outcome does not excuse coercion. An ethical relationship still needs a relevant purpose. A well-documented programme has not necessarily produced workplace application. Use the four questions together throughout delivery. ^[2]

The sponsor asks for session notes

An executive sponsor says, 'We are paying for this, so I need to see whether the coach is addressing the right issues.' The programme owner should not respond by quietly forwarding notes. Return to the agreement. The sponsor can receive the agreed goals, participation information,

progress evidence and programme evaluation. Private session content remains subject to the stated information boundaries.

A practical response is: 'You are entitled to understand the programme's purpose, delivery and agreed contribution evidence. The contract does not provide access to private session notes. We can review whether the goal and progress report give you what you need, with the participant involved, without changing confidentiality retrospectively.'

If the sponsor requires a different service, discuss that before continuing. An assessment, management review or investigation has different purposes and safeguards. Do not continue to call the service coaching while changing it into covert reporting. The professional codes and source methods place particular importance on clear agreements and conflicts of interest. ^{[2] [13] [14]}

Participation is nominally voluntary but practically coerced

A manager tells an employee that coaching is optional, then says refusal will demonstrate lack of commitment. The word voluntary has lost its meaning. Programme owners should distinguish an

organisational requirement to participate in development from the person's freedom within a particular coaching relationship. Where participation is required, explain that honestly, identify alternatives and clarify consequences through the appropriate employment process.

Do not ask the coach to conceal the requirement. A participant who understands the actual conditions can make a more informed choice about goals, practitioner fit and information sharing. A person who believes private reflection is being used to judge compliance may reasonably withhold information.

A safe exit route needs an owner, a process and protection from informal retaliation. The programme should record whether exits are handled consistently and whether some groups feel less able to request a rematch. An exit is not automatically a negative outcome; it may show that a boundary worked.

The coach is asked to assess promotion readiness

A sponsor may ask a coach whether the participant is ready for a larger role. The coach's private conversations were not necessarily designed to generate selection evidence. The participant may have disclosed uncertainty precisely because the relationship was developmental. Converting that disclosure into a readiness judgement changes the purpose and may create a conflict.

The coach can support the participant in preparing relevant work evidence or clarifying development goals. A formal readiness decision should use a separately agreed assessment process, role requirements, appropriate methods and authorised decision makers. Where a practitioner has multiple roles, the boundaries must be explicit from the outset, and some combinations may need to be avoided.

Do not solve the conflict by replacing a detailed opinion with a vague label such as 'high potential'. That is still an employment-relevant judgement. The Succession Planning volume addresses role-specific evidence and governance; this book protects the distinction between development and selection.

A serious concern is disclosed

A participant may describe harassment, unsafe work, unlawful conduct or a risk of harm. The practitioner should not promise secrecy beyond the agreed and applicable limits. They should listen carefully, avoid conducting an improvised investigation, explain relevant boundaries and seek appropriate specialist guidance. Where immediate safety is at risk, use the verified emergency or safeguarding route.

In non-urgent situations, discuss what can be shared, with whom and why, within the applicable obligations. The exact response depends on the jurisdiction, organisation, contract and nature of the concern. Do not publish one universal reporting rule for all

Gulf employers. The programme owner should establish locally reviewed routes before launch, including alternatives where the usual reporting person is implicated.

Coaching should not be used to help a person tolerate avoidable harm while the organisation declines to address it. A wellbeing goal is not a substitute for correcting unsafe conditions, excessive workload or misconduct. The practitioner can help the person consider options while the organisation fulfils its separate responsibilities.

The relationship moves beyond competence

A coach notices that sessions are increasingly concerned with severe distress rather than the agreed work goal. A mentor is asked for technical advice outside their professional competence. In both situations, being helpful requires a boundary. Explain what you can support, what you cannot responsibly assess and which qualified route may be appropriate.

A referral is not abandonment. Agree the immediate next step, avoid making a diagnosis, and clarify whether the developmental relationship should pause, continue within a narrower scope or close. The participant's dignity matters. 'This deserves support from someone with the right expertise' is different from 'You are not suitable for coaching'.

Practitioners also need support for their own judgement. Supervision or structured consultation can help examine uncertainty, power and competence. Share only the information permitted and necessary for that purpose, and use anonymisation carefully. In a small organisation, removing a name may not prevent identification.

Digital convenience creates hidden records

A video platform may generate a transcript, summary or recording automatically. An AI assistant may store prompts or use content under terms that differ from the organisation's assumptions. A coach may keep notes in a personal application. These are not merely technical preferences; they affect confidentiality, access, retention and cross-border information flows.

Before use, map what data is created, where it is stored, who can access it, which provider terms apply and how it can be deleted or exported. Obtain the required permissions and specialist review. Do not place identifiable assessment reports, session transcripts or sensitive employee information into an unapproved system. A participant's willingness to experiment does not remove the employer's data obligations.

The ebook does not certify a platform or provide country-specific privacy advice. Its practical requirement is to make the information flow visible and have the

appropriate privacy, security and legal owners approve it. Where a tool cannot meet the agreed boundaries, use a safer alternative rather than weakening the contract silently.

A mentor's influence becomes favouritism

A mentor may have access to scarce projects, influential colleagues or appointment discussions. Helping a mentee navigate the organisation can be legitimate, but it should not create an undisclosed fast track. The programme should distinguish developmental introductions from selection decisions and record conflicts where mentors influence opportunities.

Consider a programme intended to widen access. If only the most senior mentors can offer valuable assignments, participants with less powerful mentors may receive a materially different service. The solution is not to prohibit all introductions. It is to make opportunities, eligibility and allocation more transparent, and to monitor whether the programme is reproducing the inequalities it intends to address.

A mentor can say, 'I can introduce you to the project owner, with your permission. The assignment itself will follow the normal selection process.' That statement preserves support while making the boundary visible.

The participant wants advice you would not choose

A coachee may decide not to pursue promotion, to raise a difficult issue or to change career direction. The practitioner can explore consequences, alternatives and missing information without taking control. Respecting agency does not mean endorsing every action. It means helping the person make an informed choice within the relationship's purpose and boundaries.

Where the choice creates organisational implications, clarify what the participant wishes to communicate and what the agreement requires. Do not secretly alert a sponsor because you believe the employee's career preference is inconvenient. Equally, do not promise to conceal information where a clearly applicable obligation requires disclosure. These tensions should be addressed

through the contract and specialist advice, not improvised loyalty tests.

Repair an ethical mistake openly

Suppose a programme coordinator sends a participant's detailed report to the wrong manager. The response should include immediate containment, the organisation's incident process, appropriate notification, correction of access and review of the cause. Do not minimise the incident because the recipient is also an employee. Do not ask the coach to reassure the participant that nothing important happened without knowing the facts.

At relationship level, a practitioner may recognise that they have imposed an interpretation or blurred a role.

Acknowledge it, invite the participant's account of the effect and agree how to restore the boundary. A sincere apology matters, but repair also requires changed practice. Record the learning at the appropriate level without spreading private content.

A practical ethical pause

When uncertain, stop the automatic response and ask five questions: What purpose was agreed? Whose interests and rights are involved? What information and authority do I actually have? What competence or specialist input is needed? What action protects the person while allowing the legitimate work to continue? This is an original reflection aid, not a substitute for a professional code or legal advice.

Use a supervision discussion to test your answer. Explain the options you considered and why you rejected them. Ethical confidence comes from being able to examine a decision, not from never experiencing uncertainty.

Your practice task

Select one scenario from this chapter and write the exact first two sentences you would say. Then identify the record, policy or specialist you would consult before taking further action. A strong response is specific enough to protect the boundary without claiming authority or certainty you do not possess.



A clear boundary protects the person and the possibility of useful future work.

Designing an organisational programme

A programme is more than a list of matched pairs. It is a service with a purpose, an intended population, an operating model, a capacity requirement and a duty to protect participants. The relationship may be private, but the conditions that make it possible need visible ownership. This is where many well-intentioned initiatives become fragile: the sponsor approves the idea, people volunteer, and the practical questions are left to individual coaches or mentors.

Begin with the organisational need. Which work or transition requires support? What do intended participants say would help? What evidence suggests that coaching or mentoring is suitable? What other changes are necessary? A programme should not be commissioned because a senior leader enjoyed coaching or because a mentoring launch would look attractive in a talent presentation.

Use the right architecture at each level

For coaching, the 6A system operates at organisation, programme and engagement levels. At organisation level, leaders establish purpose, policy, investment and governance. At

programme level, the owner designs pathways, access, practitioner capability, matching, operations and evaluation. At engagement level, the parties contract, explore, act, review and close. The same stages connect the levels, but the decisions are not identical. ^[2]

For mentoring, MENTOR provides the programme sequence. Mandate & Mobilise establishes the strategic licence. Evidence & Engineer tests design integrity. Nominate & Match establishes fair allocation. Train & Contract prepares launch readiness. Operate & Assure supports live assurance. Review & Renew informs the next decision. BRIDGE selects the primary programme purpose, while RELATE supports individual relationships. ^[3]

Keep the architecture visible in a short programme map. A sponsor should be able to see where approval is needed. A coordinator should know which records and actions they own. A participant should understand how to obtain help. An elaborate model that nobody can use is not stronger governance.

Define the population and the access route

A programme for newly appointed managers should state what counts as a new appointment, which roles are included and how people enter. Is participation offered to all eligible managers, nominated against defined needs or selected through an application? Each route has trade-offs. Universal access may be equitable but exceed capacity. Nomination may focus investment but reproduce manager bias. Applications may reveal motivation but favour confident writers or employees with more time.

Choose the route deliberately and provide alternatives for people who cannot access it in the usual way. For shift-based or non-desk employees, an online application and meetings during headquarters hours may create a practical barrier. For a bilingual cohort, clarify available languages and practitioner capability. Do not assume that all participants prefer the same language or format because they share a country of employment.

Record the eligible population, invitations, uptake, matching, participation and completion separately. A programme with high satisfaction among participants may still have excluded a material part of its intended population. Access is not measured only by the number of places offered.

Specify a service that can actually be delivered

Describe the pathway from first communication to closure. What does the participant receive before applying? Who explains the purpose and boundaries? How are needs and access requirements discussed? How are practitioners selected? How is a match tested? What happens if a meeting is cancelled, the mentor leaves or a participant raises a concern?

The pathway should include preparation and application, not just sessions. In a coaching programme, a participant may need a goal discussion with their manager, a private fit conversation, six coaching sessions, workplace experiments and agreed progress reviews. In a mentoring programme, mentor and mentee preparation, matching, a relationship agreement, periodic check-ins and a closing review may matter more than a fixed session count.

Do not treat one pathway as universally sufficient. An executive transition, an early-career knowledge-transfer relationship and a manager's focused delegation goal have different needs. The programme can offer a small number of clearly governed pathways rather than an uncontrolled menu of exceptions.

Plan practitioner capacity honestly

Count preparation, reflection, supervision, coordination and evaluation as well as contact time. In the fictional Madar Facilities pilot, 24 supervisors each receive six one-hour coaching sessions over four months. That is 144 contact hours. With six coaches, each coach supports four supervisors and provides 24 contact hours. If preparation and brief records average fifteen minutes per session, each coach needs another six hours.

The design also includes four ninety-minute group-supervision meetings attended by each coach. That is six hours per coach, bringing the planned commitment to 36 hours each before any exceptional case consultation. Across six coaches, the programme uses 216 coach-hours. These are synthetic planning assumptions, not recommended professional ratios or market benchmarks.

Now ask whether the organisation can release that time. A manager who volunteers as an internal coach may still have a full operational workload. If the programme treats coaching as invisible additional labour, cancellations and uneven service are predictable risks. Agree workload release, manager support and cover before matching participants.

Make matching transparent without pretending it is mathematical

Start with eligibility and exclusions: relevant competence, conflicts, reporting relationships, availability, language, location or technology access, and any necessary professional specialism. Then consider developmental fit and participant preferences. A short introductory conversation can test whether the parties understand the same purpose and can work together.

A numerical matching score may help organise information, but it should not imply validated compatibility. Do not match people by nationality, personality type or a single preference score. Ask which experience and working conditions matter for this relationship. Record the rationale and the participant's informed choice.

For mentoring, a senior title is not enough. A mentor may have substantial experience but little relevance to the mentee's intended work. A less senior colleague may offer exactly the technical, transition or network knowledge needed. The programme should value relevant contribution rather than using prestige as a substitute for fit.

Design fair allocation of scarce opportunities

Some benefits depend on more than conversation: shadowing, projects, introductions or access to specialist work. These opportunities should have transparent criteria and operational ownership. A mentor should not need to create an informal exception for every useful experience.

Suppose an inclusion-and-access programme has twelve mentees but only four places on a strategic project. The programme owner should not allocate all four through the most influential mentors. Establish the learning requirements, application or nomination process, support and review. Consider alternative experiences that provide comparable learning rather than assuming one prestigious project is the only route.

Review who receives opportunity over time. Look for patterns by role family, location, working pattern and other lawfully collected, relevant characteristics. Small groups require careful privacy treatment. Differences invite investigation; they do not automatically establish discrimination or a causal effect of the programme.

Prepare the parties before launch

Participants need to know what the service offers, what it does not offer and how to use it. Coaches and mentors need preparation in the source architecture,

boundaries, records, escalation and application. Sponsors need to understand that funding does not confer access to private session content. Line managers need to know how to support practice without demanding disclosure.

A useful launch sequence includes a short programme orientation, separate practitioner preparation and a relationship-level contracting conversation. Avoid using a celebratory event as the only preparation. The important test is whether each party can explain purpose, responsibilities, confidentiality limits, access to support and the next step in their own words.

Provide plain-language materials and test them with intended users. A long policy may be necessary for governance, but participants also need a concise guide. Where a programme crosses countries or entities, identify which local requirements change and who approves those differences. Do not assume a regional programme has one employment or privacy regime.

Establish operating ownership

The sponsor owns the legitimate organisational purpose and resourcing. The programme owner owns design, delivery coordination and assurance. The practice lead supports practitioner quality, supervision and difficult cases. The participant owns their learning choices within the agreement. The line manager enables relevant workplace

opportunities. Privacy, security, procurement and legal specialists own their respective approvals.

One person may hold more than one role in a small organisation, but the responsibilities should remain distinct. A coordinator should not become the de facto clinical adviser. A sponsor should not resolve a complaint about themselves. A coach should not be expected to approve the platform's data processing terms.

Use a simple responsibility record for decisions, not a decorative matrix of initials. For each material decision, name one accountable owner, the people who contribute and the evidence required. Include the route when the normal owner is unavailable or conflicted.

Pilot the complete experience

A pilot should test the service from invitation through application and review. It is not enough to run a few good

sessions. Test whether the intended population can access the programme, whether matching works, whether practitioners have capacity, whether information boundaries are understood and whether workplace experiments are supported.

Define the pilot's learning questions before launch. Madar wants to know whether the coaching pathway helps supervisors practise clearer delegation, whether operational managers can release time and whether participants trust the information protocol. It does not claim that four months will establish a causal effect on company performance.

Agree stop or repair conditions. Examples include an unresolved confidentiality breach, inadequate practitioner competence, persistent inability to release time or a material mismatch between the stated purpose and actual use. A pilot that reveals a problem has produced valuable

information, provided the programme responds rather than hiding it in a positive launch story.

Build a proportionate cost and value view

Separate cash expenditure, internal time and opportunity cost. A coaching invoice is not the whole programme cost; equally, every hour spent in development is not necessarily an additional cash outflow. State the perspective and assumptions used. Avoid applying unsupported commercial hourly rates to make a return appear precise.

The Madar case later in the book includes a synthetic resource calculation. The purpose is to help a sponsor compare a bounded pilot with alternatives such as manager training, mentoring or process redesign. The decision should consider

suitability, access, risk and operational feasibility as well as cost.

Value evidence should be planned at the same time. What learning or behaviour is expected? Where will it be applied? Which operational measures might be relevant, and what else affects them? Who can interpret the evidence? A programme can be worthwhile without a monetised return claim, but it should still be clear about what contribution it is trying to make.

Your practice task

Draw the participant journey for one proposed programme. Mark every point at which the person needs information, makes a choice, shares data, receives support or applies learning. Then identify the owner of each point and the most likely failure. The resulting map should reveal at least one design decision that would remain hidden in a simple list of coaching sessions or mentor pairs.



The programme includes release time, matching, support and safe exit, not just sessions.



04

Assure and sustain

Read the explanations, examine the worked decisions and apply the method to a real, appropriately bounded situation.

Chapter 10 / Developing coaches and mentors

Chapter 11 / Evaluating developmental contribution

Chapter 12 / Sustaining and closing relationships

Developing coaches and mentors

A practitioner can be knowledgeable, well intentioned and still need development in the work of coaching or mentoring. A senior manager's experience does not automatically establish coaching competence. A qualified coach may understand individual practice but need help with the organisation's programme model, data arrangements or operational context. Capability should be considered against the actual service and its risks.

This book provides education and practice material. It does not award a coaching credential, certify a mentor or replace supervised professional development. The organisation should establish its practitioner requirements using the service purpose, relevant professional standards, participant needs and local obligations. ^{[2] [13] [14]}

Define capability as observable practice

For coaching, look for the ability to establish a clear agreement, listen accurately, work with goals and context, offer proportionate challenge, support agency, design workplace application and recognise limits. For mentoring, add the ability to make experience useful, distinguish advice from instruction, create

appropriate connections and avoid imposing a personal career path.

The practitioner must also be able to operate within the programme. Can they explain the information protocol? Can they maintain appropriate records? Do they recognise a conflict or referral need? Do they use supervision or consultation? Can they close a relationship constructively? These are not administrative extras; they affect the safety and usefulness of the service.

Avoid evaluating competence only through self-confidence or participant satisfaction. A participant may like a practitioner who gives reassuring advice without challenging an important assumption. Another may value a difficult conversation only after applying it. Use several relevant sources, including observed practice, reflective explanation, case discussion and feedback, with clear limits to each.

Distinguish entry preparation from continuing development

An introductory programme can teach concepts and provide supervised practice. It cannot establish competence for every context. Specify which work a new

practitioner may undertake, what support is required and when a more experienced practitioner should be involved. A bounded internal coaching service for routine development needs differs from high-complexity executive work or situations involving significant psychological distress.

Continuing development should respond to actual practice. A coach who repeatedly moves too quickly to action may need observation and feedback on exploration. A mentor who overuses personal stories may need practice in checking relevance and inviting the mentee's interpretation. A practitioner who avoids ethical tension may need structured case consultation, not another generic listening seminar.

Keep a development record that connects the need, practice activity, feedback and evidence of change. Attendance at a course is an input. The record should also show what the practitioner can now do more consistently and where their limits remain.

Use observation with informed permission

Observation can involve a simulation, an agreed recording or live practice with appropriate consent and data controls. Explain who will observe, what they will record, how feedback will be used and what will happen to the material. Do not assume that a participant who agrees to coaching has also agreed to their session being used for training.

For early practice, original fictional scenarios can provide a safer starting point. The observer focuses on defined behaviours: how the practitioner contracts, distinguishes observation from inference, checks understanding and supports an owned action. They should not score a performance using vague impressions such as 'natural warmth' or 'executive presence'.

Real practice may then be reviewed proportionately, within the agreed boundaries. The aim is to improve judgement, not to create a surveillance culture around every conversation. A practitioner should feel able to bring uncertainty and mistakes to supervision without being rewarded only for polished success stories.

A complete skills-practice session

For a ninety-minute internal practice session, use groups of three: practitioner, participant and observer. Spend ten minutes clarifying the skill and boundaries. Use a fifteen-minute fictional conversation, followed by ten minutes of observation-based feedback. Repeat the same moment for ten minutes so the practitioner can try a different response. Use another fifteen minutes to rotate roles for a focused second attempt, then fifteen minutes for debrief and ten minutes for individual application plans. The final five minutes confirm follow-up and any unresolved questions.

The fictional participant brief should contain enough information to respond consistently. For example, a manager wants to delegate a monthly report but worries about errors after a previous missed deadline. The hidden context is not a dramatic personal secret; it is that the manager has never clarified which figures require verification or who can approve corrections. The practitioner should discover relevant work conditions rather than diagnose a personality problem.

The observer records exact questions, summaries, interruptions, assumptions and action ownership. During feedback, they offer two observations connected to the target skill, one strength and one change to test. The repeated attempt makes the feedback usable immediately. This is an educational practice design, not an accredited assessment of coaching competence.

Supervision is a place to examine judgement

Supervision provides structured reflection on practice, ethics, relationships and professional development. It is not simply a report to the programme sponsor. Its purpose and confidentiality arrangements should be clear. A practice lead may also have quality-assurance responsibilities; where roles overlap, explain which information is used for which purpose.

A useful supervision discussion begins with a specific moment: what happened, what the practitioner noticed, what they did, what they were uncertain about and what alternatives they considered. Explore the organisational context and power relationships as well as technique. A coach may be struggling because the sponsor's expectations contradict the participant agreement, not because they need a more sophisticated question.

Do not disclose more identifying information than necessary. Where a case is highly recognisable, obtain appropriate guidance on how it can be discussed. The programme should provide a route for urgent consultation outside the normal supervision schedule when a material concern arises.

Develop mentors as thoughtful users of experience

Mentor preparation should include listening, boundaries, advice with context, fair access, appropriate introductions and knowledge-transfer practice. Ask mentors to prepare a story in which they changed their mind, made a mistake or discovered that their usual approach did not fit. This counters the tendency to present experience as a sequence of inevitable successes.

Practise a simple advice sequence: understand the mentee's question; offer the relevant context from experience; explain the decision and trade-off; invite

comparison; leave the choice with the mentee. The sequence is an original teaching aid aligned with RELATE, not an additional branded model.

Mentors should also recognise when experience is insufficient. A specialist may need formal training or supervised technical practice. A career question may require access to accurate role information. An employment concern may need an HR or legal process. A mentor's network can help the mentee find the right route without pretending the mentor personally holds every answer.

Prepare managers for coaching within authority

Managers can use listening, questions and reflection in everyday work, but they remain responsible for standards, resources and decisions. Development should therefore include mode switching.

A manager practises saying, 'This part is a required standard', 'I can offer advice', or 'There is room for you to choose the approach'. Clear language reduces the risk that an employee mistakes a management instruction for an open coaching question.

Observe how the manager responds when an employee proposes an approach they would not have chosen. Can they distinguish a legitimate difference from a material risk? Can they allow learning within an agreed boundary? Can they give feedback without taking the work back? These behaviours connect coaching skill with practical management, rather than treating it as a separate conversational performance.

Do not require a manager to coach through an urgent safety issue or a task the employee has not been trained to perform. Direction and instruction may be the appropriate response. The development goal is flexibility and

judgement, not maximum use of questions.

Evaluate practitioner development through transfer

Define a few observable practice changes and gather evidence over time. A coach working on premature advice might review whether they clarify the participant's question and obtain permission before offering a perspective. A mentor working on autonomy might ask mentees whether they felt able to disagree or choose a different action. These are local feedback questions, not validated competence scales.

Combine the evidence with observation and reflective explanation. Participant feedback should be protected and interpreted in context. A low response rate or a small group limits conclusions. A positive average should not conceal a

serious boundary concern. Material issues require the appropriate review regardless of the overall score.

At programme level, maintain a capability register showing approved scope, preparation, supervision, development needs and review dates. Restrict access appropriately. The register should support safe allocation of work, not become a public ranking of practitioners.

Your practice task

Choose one practitioner skill and design a short observation exercise. Write the fictional participant brief, the behaviours an observer should record, the feedback questions and a repeated attempt. Then identify the evidence that would justify expanding the practitioner's scope and the evidence that would require more support. Avoid relying on confidence or course completion alone.



Capability grows through observed practice, feedback and appropriate supervision.

CHAPTER 11 / MAKE A USEFUL CLAIM, NOT A LARGE ONE

Evaluating developmental contribution

Evaluation begins with the decision it must support. A sponsor may need to decide whether to continue a pilot, change access, invest in practitioner capability or stop an unsuitable pathway. A participant may need to decide which practice to retain. These decisions require different evidence. A single satisfaction score cannot answer all of them.

The source coaching method connects evaluation with assurance throughout 6A. The mentoring source uses a balanced scorecard covering Reach, Equity, Fidelity, Experience, Learning, Application, Talent, and Strategic value and risk. These categories help prevent a programme from being judged only by attendance or enthusiastic comments. They do not require every programme to collect every possible measure. ^{[2] [3]}

Begin with a contribution hypothesis

Write the expected chain in plain language. For the Madar pilot: clearer contracting and coached delegation practice should help supervisors make authority and checkpoints explicit; with manager support and reliable planning information, coordinators should own more routine decisions; this may reduce

avoidable take-back and improve planning reliability. Each link contains an assumption that can be examined.

The hypothesis is not a claim that coaching alone produces the outcome. Other changes may matter: staffing, system reliability, workload, a new planning template or changes in supplier response. Record these influences from the beginning. Evaluation becomes more credible when it explains what else was happening rather than treating context as an inconvenience.

Choose evidence at several points in the chain. Participation shows whether the service was used. Relationship feedback shows whether the experience was appropriate and useful. Practice records show what behaviour was attempted. Operational evidence shows what happened in work. No single point proves the whole chain.

Separate implementation from effectiveness

A programme may fail because the intended intervention was not delivered. Meetings may be cancelled, matching may be poor or workplace practice may be impossible. It may also be delivered as

designed but fail to address the real need. These are different findings and imply different responses.

Fidelity does not mean rigid adherence to every planned activity. It means knowing which core elements were delivered, which were adapted and why. In coaching, a participant's goal may legitimately change. In mentoring, the relationship may move from role transition to career exploration. Record the change and review whether the programme's purpose and evaluation still fit.

A launch report that states '24 participants enrolled' should not be described as evidence of improved capability. A completion report that states '20 participants attended all sessions' should not be described as evidence of sustained transfer. Use precise labels so that the reader knows what each number establishes.

Measure access and experience carefully

Reach compares participation with the intended population. Equity examines whether access, support and opportunities differ in ways that need attention. Experience concerns how participants and practitioners understand the quality of the relationship and programme. These measures can identify design problems before outcome evidence is available.

Use a small number of clear questions. For example: 'I understood what information would be shared', 'I could raise a concern about the match', or 'I had a realistic opportunity to apply the agreed learning'. State the response options and provide a route for comments or confidential concerns. Do not mix these service questions into a psychological scale and label it validated.

Report denominators and missing responses. If eighteen of twenty-four participants respond, the experience findings describe those eighteen respondents. Investigate whether nonresponse reflects timing, access or concern without pressuring individuals to disclose. Protect small groups and avoid publishing identifiable comments.

Observe application close to the work

Application evidence should relate to the participant's goal. For a delegation goal, review agreements, checkpoints and intervention decisions. For a mentoring goal about technical judgement, review supervised explanations and demonstrations. For stakeholder leadership, examine the sequence of consultation, options and decisions in a real project.

The evidence should be proportionate and permission-based. A manager may observe a meeting or review a work product, but the coach should not gather secret performance information. The

participant and programme should understand how evidence will be used. Avoid turning every learning experiment into a formal performance assessment.

Use repeated observations where practical. One successful attempt may be encouraging without showing a stable habit. A later challenge may reveal that the behaviour depends on conditions not yet secured. Development is often uneven; evaluation should make that pattern visible rather than forcing a simple success/failure label.

A synthetic pilot result

Imagine that Madar's 24 participants complete a four-month pilot. Twenty-two begin coaching, twenty complete at least five sessions and eighteen submit the agreed application record. Of those eighteen, twelve provide corroborated examples of clearer delegation, four provide self-reported examples only and two cannot yet demonstrate the planned change. These are invented teaching data, not actual HR Delivery results.

A defensible report does not say '67% of managers improved' without qualification. Twelve of eighteen submitted records contain corroborated evidence; twelve of twenty-four originally offered places is a different denominator. Neither number establishes the programme's causal effect. The report should explain who participated, what evidence was available and what remains unknown.

Suppose the operational planning measure improves from 72% to 81% on-time completion during the same period. A new supplier-response process also began. The programme may have contributed, but the observed improvement cannot be attributed wholly to coaching. Interview the operational owners, compare the timing of changes and examine whether the expected behavioural mechanism is visible.

Compare intelligently when possible

A comparison group or phased introduction can strengthen interpretation, but design quality matters. Groups may differ in workload, role complexity, baseline capability or manager support. Voluntary participants may be more motivated than nonparticipants. A simple before-and-after comparison does not remove these differences.

For a small pilot, a transparent contribution analysis may be more useful than an underpowered statistical exercise. State the hypothesis, gather mixed evidence, consider rival explanations and explain the strength of the conclusion. For a larger programme or a consequential investment claim, involve an evaluation specialist early enough to design a suitable comparison and data plan.

Avoid selecting only favourable outcomes after results are known. Decide the main questions and measures in advance, then

report important unintended effects and limitations. A programme that improves confidence but increases dependence on mentors needs a more nuanced response than a celebratory satisfaction headline.

Keep costs and benefits on the same basis

When considering financial value, state which costs are included, which benefits are observed or estimated and the period involved. A benefit estimate should not be treated as realised cash unless it actually changes expenditure or revenue. Time saved may release capacity without reducing payroll cost. Avoid counting the same benefit in both productivity and cost-reduction categories.

Use sensitivity analysis for uncertain assumptions. If a sponsor believes improved planning could save between twenty and forty hours per month, show the range and explain how it will be checked. Do not choose the largest figure simply to make the programme appear attractive. The book's worked case uses synthetic costs to teach this discipline, not to establish a coaching return benchmark.

Some important outcomes should not be monetised casually. Fair access, trust, ethical practice and participant agency matter even when a credible monetary estimate is unavailable. Financial analysis should support a broader decision, not erase those responsibilities.

Decide what to continue, adapt or stop

A useful evaluation ends with an owned decision. Continue a pathway when the need remains relevant, delivery is sound and the evidence supports further use. Adapt when the mechanism appears promising but access, matching, capacity or transfer conditions need improvement. Stop or pause when the service is unsuitable, unsafe or unable to provide useful evidence for its purpose.

Make conditions explicit. 'Continue for a second cohort after operational managers approve protected practice time and the matching process is revised' is more useful than 'The pilot was successful'. Name the owner, action and review date. Preserve unresolved questions rather than hiding them in an appendix.

Participants deserve to hear what the organisation learned and what will change. Share an appropriate programme-level summary without revealing private relationship content. Visible follow-through strengthens the credibility of future invitations to participate.

Your practice task

Write an evaluation question for a real programme decision. Identify one implementation measure, one learning or application measure, one relevant work outcome and one alternative explanation. Then write the strongest claim the available evidence would support and the stronger claim it would not support. This distinction is a core professional skill, not a sign of weak confidence.



Describe the contribution the evidence supports, not the largest claim a sponsor might like.

Sustaining and closing relationships

A good ending is part of a good developmental relationship. It helps the participant recognise what has changed, understand what remains to be learned and continue without unnecessary dependence on the practitioner. It also allows the programme to release capacity, review value and improve its design. Ending should not be an awkward administrative event that occurs only because the contract expires.

Discuss closure at the beginning. Explain the expected duration, review points, possible reasons for extension and routes for ending early. The participant should know that a relationship can conclude successfully without solving every future development need. A mentor is not required to remain indefinitely available, and a coach should not create the impression that progress depends on continuing sessions forever.

Review the purpose, not just the number of meetings

Return to the original goal and any agreed revisions. What did the participant learn? What did they practise? What evidence shows a change in work? What conditions helped or hindered application? Which questions remain? The review should be

specific enough to guide the next stage of development.

For Amal, closure might involve comparing the original delegation pattern with later planning cycles. She may now define authority more clearly, use checkpoints and distinguish removing a barrier from taking over the task. She may still need support with a new, more complex service contract. The closing conversation can recognise the established practice while identifying a different future need.

Do not rewrite the original goal retrospectively so that every outcome appears successful. If the relationship did not address the intended need, say so and examine why. Perhaps the goal was poorly chosen, the practitioner was not a good fit or the organisation failed to provide an opportunity to practise. Honest closure provides useful learning for all parties.

Consolidate a portable practice

Ask the participant to describe the practice they will retain in their own words. What cue will remind them? What record, conversation or routine will support it? Who can provide feedback?

What signs will indicate that the old pattern is returning? The answer should be usable without the coach or mentor present.

A short personal guide may be enough. Amal writes: 'Before delegating, agree the outcome, authority, information, checkpoint and escalation. When I feel the urge to take back the work, identify the actual decision or barrier first.' This is her own practical reminder, not a universal formula imposed by the coach.

Encourage a network of support rather than dependence on one person. A manager, peer, technical adviser or community of practice may help with different needs. The participant should know which support is appropriate for which question and how to ask for it.

Decide whether an extension is justified

An extension may be useful when a new phase of work provides a relevant opportunity to consolidate learning. It may be less useful when the relationship has lost purpose or become a substitute for decisions the organisation should make. Ask what the extension would accomplish that the current agreement has not, what evidence will be reviewed and why this practitioner remains the right choice.

Separate a new engagement from an indefinite continuation. Revisit goals, boundaries, capacity, cost and consent. A participant moving into a new role may

need a different coach or mentor. A practitioner who has supported private exploration may not be the right person to conduct a formal readiness assessment.

The sponsor's wish to retain a valued service is not sufficient by itself. The participant's agency and the programme's fair access obligations still matter. Extending one relationship may reduce access for someone else; that trade-off should be governed rather than hidden.

End early with dignity

Reasons for early closure include poor fit, changed circumstances, lack of capacity, a conflict, a boundary concern or a need for a different service. The process should distinguish these reasons without forcing unnecessary personal disclosure. A participant can request a rematch without having to prove that the practitioner is incompetent.

Where there is a complaint or material concern, use the appropriate independent route. Do not make the participant negotiate directly with the person whose conduct concerns them if that would be unsafe or unfair. The programme owner should ensure continuity of support where appropriate and protect relevant records under the approved process.

A simple closing statement can be respectful: 'The current arrangement is not meeting the agreed need. We will end this match, confirm what information is retained and discuss a more suitable next step.' There is no need to turn every

ending into a judgement about either person's character.

Close information responsibilities

Confirm which records the participant receives, which programme records are retained, who has access and when deletion or review occurs. Session notes, assessment reports, contracts, action plans and evaluation data may have different purposes and retention requirements. Follow the approved schedule and applicable local requirements rather than choosing a convenient universal period.

Remove unnecessary access when a practitioner leaves a programme. Confirm the provider's return or deletion of information where required. Check shared folders, platforms and automated records, not only the main database. A programme can be complete operationally while leaving sensitive information in inappropriate places.

The participant should understand what closure means for contact and confidentiality. Ending the programme does not make private information freely shareable. An informal professional relationship that continues afterwards should have its own clear expectations.

Renew the organisational system

At programme level, use the accumulated evidence to review purpose, access, practitioner capability, matching, application and contribution. Which groups were underserved? Which needs were better addressed through another intervention? Which recurring system barriers appeared across relationships? Share organisational themes only at an appropriate level of aggregation and with the agreed permissions.

Do not use private coaching material as a substitute for a properly designed organisational diagnostic. A few recurring concerns may justify a new inquiry, not a

claim that the whole organisation has been diagnosed. The OD Diagnostic Framework, employee listening and operational evidence can provide complementary routes when a broader question emerges.^[1]

For mentoring, Review & Renew is the final MENTOR stage, but the next cycle may return to an earlier design decision. A programme originally focused on role transitions may need a separate knowledge-transfer pathway. Keep the purposes distinct rather than expanding the existing programme until it promises everything.^[3]

The practitioner's own closing reflection

Ask what you contributed and what you may have assumed. Where did you listen well? Where did your experience, status or preferred method narrow the

conversation? Which moment deserves supervision or further study? What would you change in a similar engagement?

This reflection should be evidence-based rather than self-congratulatory. A participant's gratitude is welcome, but it is not the only evidence of value. A difficult ending may still reveal responsible practice. The aim is to become more thoughtful and capable, not to construct a flawless professional story.

Your next step

Choose one relationship or programme approaching a review. Prepare a closing conversation around purpose, learning, application, future support and information responsibilities. Then identify one improvement the organisation should make before the next cohort. A successful ending leaves the participant with greater agency and the programme with clearer judgement about where it can contribute.



A good ending leaves the participant more able to continue without the relationship.

WORKED CASE 01 / WHOLLY FICTIONAL

Madar Facilities: a coaching pilot that changes course

Madar Facilities is a fictional Qatar-based service business. Its operations director wants 24 recently appointed supervisors to become more effective at delegation. The organisation works across several client sites, and supervisors coordinate planners, technicians and service requests. Some employees work shifts and some use English as an additional language. These are case conditions, not claims about Qatar employers generally.

The director's initial request is simple: provide each supervisor with six coaching sessions and demonstrate a reduction in late weekly plans. HR Delivery, acting as the fictional consulting partner, first asks what the supervisors are expected to do differently and what evidence supports the proposed response. The answer changes the design before the first match is made.

The evidence available at commissioning

The previous four reporting weeks show that 72% of weekly plans were completed by the agreed deadline. That measure describes plans, not individual supervisor competence. Interviews with eight supervisors identify three recurring issues: uncertainty about which decisions

coordinators can make, late availability information and a tendency for supervisors to rewrite plans when time becomes tight. Two site managers describe repeated last-minute supplier changes.

The evidence supports a mixed explanation. Some supervisors may benefit from examining assumptions and practising delegation. Some coordinators need clearer task instruction. The information flow requires operational attention. A coaching-only response would leave two of the three main conditions untreated.

The sponsor has not yet established whether the four-week baseline is representative. One period included unusual client demand. The programme record therefore labels the baseline provisional and asks the operations analyst to retain the definition and examine a longer series when available. The uncertainty does not prevent a bounded pilot, but it limits the claims that can be made later.

Three credible options

The first option is the original coaching-only programme. It offers individual attention and can address varied supervisory habits. Its weakness is that it may personalise an operational problem and ask participants to practise without the necessary conditions.

The second option is a standard delegation workshop for all supervisors, supported by a planning template. It is easier to scale and may clarify common expectations. Its weakness is that knowing a method may not change the assumptions or reactions that lead supervisors to take work back under pressure.

The third option is a combined but clearly separated response: a short operational clarification of authority and information flow, basic instruction for coordinators who need it, and a focused coaching pilot for supervisors who choose a relevant goal. The organisation selects this option. Coaching remains a distinct service rather than a label for the whole improvement programme.

The 6A design

Under Align, the programme charter states that coaching is intended to support clearer delegation and proportionate intervention. The operations director owns the planning process and the late-information action. The learning manager owns the coaching

programme. The practice lead oversees coach preparation and supervision.

Under Agree, the parties use a three-way relationship agreement between supervisor, coach and sponsor, with a programme-owner annex. This preserves the four-way responsibilities in the source 6A method. Private session notes are not shared with the director. Agreed goals, participation status and participant-approved application evidence can inform progress reviews. Material concerns use the defined escalation route.^[2]

Under Assess, each participant chooses a specific work situation and establishes a proportionate baseline. The programme does not require a large psychometric battery. Where an authorised assessment could answer a particular development question, its use is separately discussed and justified. The availability of AC05 does not make it mandatory for every supervisor.

Under Activate, the coach helps the participant examine choices and assumptions. Under Apply, the supervisor tests one or two practices in actual work, with the relevant manager's support. Under Assure, the programme reviews access, relationship quality, application and contribution, while protecting information boundaries.

Amal's individual pathway

Amal manages a service-planning team. She describes herself as responsible and reliable, but often takes back work when an update is late. Her coach, Reem, does not interpret this as a fixed control trait. They examine a recent episode and discover that the coordinator did not know which decisions could be made without Amal's approval.

Amal's first experiment is to agree the outcome, decision boundary, information sources, checkpoint and escalation conditions before the next weekly plan. At the checkpoint, she asks which decision is needed rather than rewriting the draft. The coordinator is told that this is a development experiment in how the work is organised, not an assessment of their personal worth.

The first cycle works smoothly. In the second, a supplier delay creates a genuine constraint. Amal helps escalate the dependency while leaving the plan with the coordinator. The learning is not 'never intervene'. It is to distinguish enabling someone to complete the work from becoming the default owner of their task.

Capacity and cost assumptions

The pilot offers 24 supervisors six one-hour sessions over four months: 144 planned contact hours. Six coaches each support four supervisors, or 24 contact hours per coach. Fifteen minutes of preparation and brief records per session

adds 36 hours across the coach group. Four ninety-minute supervision meetings per coach add another 36 hours. Planned coach time is therefore 216 hours.

For appraisal, the organisation uses synthetic internal valuation rates, not market prices. Contact time is valued at QAR 450 per hour, preparation at QAR 300, coordination and evaluation at QAR 200, and participant session time at QAR 120. External group supervision is budgeted at QAR 1,500 per meeting for four meetings. The rates are assumptions used only in this teaching case.

The resulting planning values are QAR 64,800 for contact time, QAR 10,800 for preparation, QAR 6,000 for supervision, QAR 8,000 for forty coordination hours, QAR 17,280 for participant session time and QAR 4,000 for twenty evaluation hours. The total is QAR 110,880. The supervision attendance time is included in the coach-capacity calculation but is not separately monetised in this example; the omission is stated rather than hidden.

This is a partial economic view, not a cash budget or full cost-benefit analysis. Internal time values do not necessarily represent additional expenditure. Workplace practice, operational redesign and any assessment costs are outside this total and need separate consideration. A sponsor comparing options should not treat the figure as the complete cost of improving planning reliability.

The midpoint problem

After six weeks, two supervisors have not begun coaching and four have missed sessions because site managers will not release time during peak periods. The programme coordinator initially describes this as low participant commitment. The practice lead challenges the interpretation. The invitation promised protected time, but the operational managers had not approved a workable cover arrangement.

The programme pauses new matches at the affected sites. The sponsor agrees a release schedule and provides a short briefing to site managers about their role in application. Participants can reschedule without being labelled unmotivated. The repair addresses the delivery condition rather than asking coaches to persuade employees to attend in their personal time.

This is a material pilot finding. The programme was not ready to scale simply because the first sessions received positive comments. The capacity issue becomes an explicit condition for a second cohort.

What the end-of-pilot evidence shows

The final synthetic record contains 24 offered places, 22 participants who began, 20 who completed at least five sessions and 18 who submitted the agreed application record. Twelve records include corroborated examples of clearer delegation, four contain self-reported examples only and two do not yet demonstrate the planned change.

The report presents these denominators separately. It does not state that 67% of all supervisors improved. Twelve divided by eighteen describes the proportion of submitted records with corroboration; twelve divided by twenty-four describes that evidence relative to all offered places. Neither establishes causation or the experience of those who did not submit.

On-time weekly plans rise from 72% to 81% during the pilot period. The supplier-response process has also changed. Interviews suggest that clearer delegation helped some teams, but the evaluation cannot isolate the coaching effect. The report therefore describes a plausible contribution supported by

behavioural examples, alongside a concurrent operational intervention and limitations in the baseline.

The decision and its conditions

Madar continues the coaching pathway for a second, smaller cohort, conditional on approved release time, clearer eligibility and a stronger application-evidence process. It retains the operational process owner and does not transfer responsibility for planning reliability to the coaches. The second cohort will use a longer baseline and a phased introduction where operationally feasible.

Amal closes her first engagement with a practical reminder and a plan to request feedback during a more demanding planning cycle. Reem's private notes remain private under the agreement. The sponsor receives the agreed evidence summary, not a judgement that Amal is now ready for promotion.

The case illustrates an important professional judgement: a programme can be worth continuing while its original

causal claim is rejected. The useful result is a better designed service and a more precise understanding of contribution, not an inflated success percentage.

Discuss the case

Before reading the decision, a practitioner could reasonably have chosen a workshop-first pilot with targeted coaching later. That option becomes stronger where the main gap is shared knowledge rather than individual practice. The combined response is defensible here because the evidence suggests both common operating ambiguity and varied supervisory habits. A different evidence pattern should change the recommendation.

Ask which finding would have caused you to stop rather than adapt. An unresolved confidentiality breach, a persistent lack of practitioner competence or a sponsor insisting on covert session reporting would require a different response from the release-time problem. The distinction between a repairable design issue and a fundamental boundary failure belongs in the decision record.

WORKED EXHIBIT

Madar: reconcile demand and resource

Item	Calculation	Planned amount
Coaching contact	24 participants x 6 sessions x 1 hour	144 coach hours
Preparation / records	144 sessions x 0.25 hour	36 coach hours
Supervision attendance	6 coaches x 4 groups x 1.5 hours	36 coach hours
Total coach commitment	144 + 36 + 36	216 hours / 36 each
Coordination	Original planning assumption	40 hours
Evaluation	Original planning assumption	20 hours
Participant meeting time	24 x 6 x 1 hour	144 hours

Wholly fictional planning data. Participant workplace practice and the operational redesign are additional. These are workload estimates, not industry benchmarks.

WORKED EXHIBIT

Madar: an explicitly partial cost view

Cost element	Calculation / QAR	Amount / QAR
Coach contact	144 x 450	64,800
Preparation and records	36 x 300	10,800
External group supervision	4 x 1,500	6,000
Coordination	40 x 200	8,000
Participant time	144 x 120	17,280
Evaluation	20 x 200	4,000
Total included valuation	Sum of the six lines	110,880

Synthetic rates for teaching, not market prices. Coach supervision-attendance time is not separately monetised. Practice, operational redesign and assessment costs are outside this partial view. Do not present it as a complete cash budget.

WORKED EXHIBIT

Madar: a denominator-aware review

Observation	Count	What it can establish
Offered participation	24	Reach of the invitation, not completed learning.
Started	22 of 24	Uptake; investigate reasons without assuming motivation.
Completed at least five sessions	20 of 22 starters	Delivery exposure, not verified transfer.
Provided application records	18 of 22 starters	Available evidence; missing records remain visible.
Corroborated application	12 of 18 records	Some relevant work evidence, not automatic attribution.
Self-report only	4 of 18 records	A useful account needing contextual interpretation.
No observed change	2 of 18 records	A reason to understand barriers and revise action.

Fictional observations. On-time service changed from 72% to 81% while a supplier-process change also occurred. The programme cannot claim sole causation.

WORKED CASE 02 / WHOLLY FICTIONAL

Harbour Skills Partnership: mentoring without a preferred career path

Harbour Skills Partnership is a fictional Oman-based technical services organisation. It has twelve experienced specialists approaching planned role changes and eighteen colleagues who need broader technical and stakeholder experience. The executive team proposes a mentoring programme to protect knowledge and develop future capability. The initial plan pairs each specialist with a 'high-potential' employee chosen by a manager.

HR Delivery, the fictional consulting partner in this case, asks the organisation to separate three questions. Which knowledge is critical to continuity? Which employees want the relevant development? Which opportunities are available to practise and demonstrate learning? The answers reveal that a prestigious mentoring relationship is not enough to solve the continuity problem.

A purpose that can be evaluated

The organisation chooses Generational Knowledge as the primary BRIDGE purpose, with Development & Careers as a secondary benefit. The main work is to

transfer judgement about unusual service conditions, client interfaces and technical escalation. The programme is not a promise that mentees will replace their mentors or move into management. ^[3]

This distinction matters to Huda, a senior analyst who wants to deepen specialist expertise. Her manager originally nominated her because they believed she should become a team manager. Huda is interested in learning complex client-interface work but does not currently want a people-management role. The programme records her aspiration without treating it as a lack of ambition.

The organisation also discovers that two supposedly scarce areas are well documented and can be taught through formal instruction. Those areas are removed from the mentoring priority list. The programme concentrates on situations where experienced judgement, observation and reflective discussion are likely to add value.

MENTOR as an operating sequence

Mandate & Mobilise establishes the continuity problem, the sponsor and the limits of the programme. Evidence & Engineer identifies critical situations, the intended learners, available practice opportunities and the information boundaries. Nominate & Match combines transparent eligibility with individual interest and mentor suitability rather than relying only on manager nominations.

Train & Contract prepares mentors and mentees to use RELATE, establishes supervision or support routes and confirms technical authority. Operate & Assure monitors whether meetings and practice occur, whether relationships remain useful and whether concerns are addressed. Review & Renew determines which knowledge-transfer arrangements should continue and which should become part of normal capability development. ^[3]

The programme owner uses the source gate names to make decisions visible: Strategic Licence, Design Integrity, Fair Allocation, Launch Readiness, Live Assurance and Renewal. Passing a gate means the named owner has reviewed the required evidence. It does not mean a form has merely been uploaded.

The matching decision

The first proposal pairs Huda with the most senior technical manager. He is influential and widely respected, but his

experience is concentrated in a different service area and his calendar allows little contact. A second mentor, Mariam, has less seniority but extensive experience in the client-interface situations Huda needs to understand. She can provide regular observation and reflective review.

The programme chooses Mariam after a fit conversation with both parties. The rationale records relevant experience, availability, absence of a direct reporting conflict and Huda's preference. It does not use a personality compatibility score. The senior manager remains a possible source of a specific introduction, with permission, rather than being treated as the only credible mentor.

Two other pairs request rematching after their introductory meetings. The programme accepts the requests without requiring a complaint. The rematch process tests whether the issue concerns purpose, availability or working conditions and offers a suitable alternative. This provides early evidence that the promised safe-exit route is usable.

RELATE in Huda's first meetings

During Readiness & Rapport, Huda explains the work she wants to understand and the career path she does not currently want. Mariam describes the situations in which her experience may be useful and those outside her expertise. During Expectations & Ethics, they agree monthly meetings, observation

opportunities, confidentiality and how any client information will be handled.

In Listen & Learn, Mariam asks Huda to describe a recent interface problem. Huda had followed the formal procedure but missed an early sign that the client's priorities were changing. Rather than telling a long story about her own career, Mariam asks what signals Huda noticed, what she assumed and what other information might have been available.

In Advise, Challenge & Connect, Mariam offers a specific comparison from experience and explains its limits. She suggests observing a planning discussion with the client's authorised contact, subject to permission. In Translate into Action, Huda prepares a set of questions and a decision-cue record. In Evaluate & Evolve, they review what she learned and identify the next situation to practise.^[3]

The participant material is real work

The programme does not ask mentees simply to shadow an expert for a day. Each learning episode has a situation, a purpose and an output. For Huda, the situation is a service-priority meeting. The purpose is to recognise when a changed client assumption requires a revised internal decision. The output is a short account of the cues, options, decision boundary and escalation route.

Mariam first explains a completed example. Huda then observes an authorised meeting and records her

interpretation. They compare interpretations afterwards. In a later, lower-risk situation, Huda prepares the analysis and explains her recommendation while an authorised specialist retains formal approval. The organisation verifies technical competence through its normal process, not through the mentor's enthusiasm alone.

The sequence distinguishes learning from authorisation. A mentee may understand the reasoning before being permitted to make a regulated or high-consequence decision independently. The programme records what has been demonstrated, under what conditions and what remains to be verified.

A fairness problem appears

After two months, mentees paired with senior managers have received more project invitations than those paired with technical specialists. The programme's satisfaction average is positive, but the opportunity record shows an uneven pattern. The sponsor initially argues that this is a natural benefit of mentoring.

The programme owner returns to the purpose and fairness design. Developmental connections can be useful, but scarce assignments should not depend entirely on a mentor's influence. The organisation creates a visible list of suitable practice opportunities, with eligibility and allocation criteria. Mentors can suggest opportunities, but the

relevant operational owner makes the decision through the agreed process.

The change does not guarantee equal outcomes. It makes the route more transparent and allows the programme to investigate whether participants with comparable needs have a fair opportunity to learn. The review also checks whether shift patterns and language access affect participation.

A mentor's planned departure changes the risk

One specialist's role change is brought forward by three months. Their mentee has attended meetings but has not yet demonstrated the critical troubleshooting process. A replacement-list approach would have reported the role as covered because a mentee was named. The programme instead reports a remaining continuity gap.

The operational owner arranges supervised practice with a second specialist, updates the emergency escalation record and considers temporary external support. Mentoring continues where useful, but the continuity response is not left to the relationship alone. The source S8 succession framework provides a complementary

route for critical-role exposure and cover; the mentoring programme does not pretend to own the entire succession decision. ^[4]

This is a useful example of connected frameworks. BRIDGE clarifies why the mentoring relationship exists; RELATE supports learning; S8 clarifies whether the organisation has credible cover for critical work. The models answer different questions and should not be merged into one convenient score.

Evaluation that keeps the distinctions visible

The synthetic pilot includes eighteen mentees. Sixteen establish an active match, fourteen complete the planned sequence of three learning episodes and eleven provide a supervised demonstration accepted by the relevant operational owner. Three participants need further practice; two relationships end early because the original purpose no longer fits.

The report separates reach, relationship experience, completed learning episodes and verified technical demonstration. It also records the changed opportunity-allocation process and the unresolved continuity gap. It does not

claim that eleven mentees are ready to replace eleven senior specialists. The demonstrated tasks cover only part of the future roles.

Huda's closing record states that she can recognise and explain specified client-priority cues in the observed situations, with further experience needed for more complex exceptions. Her career aspiration remains specialist development. The programme treats this as a legitimate outcome rather than trying to convert it into a management-pipeline success story.

The renewal decision

Harbour continues the knowledge-transfer pathway with a smaller number of more clearly defined critical situations. It retains transparent opportunity allocation, a rematching route and separate technical sign-off. It also establishes a community of practice for knowledge that benefits a wider group, reducing reliance on individual pairs where a shared learning route is more appropriate.

The programme owner recommends against expanding immediately into every BRIDGE purpose. A separate

role-transition pathway may be valuable later, but it needs its own need analysis, mentor criteria and evaluation. The decision protects the clarity that made the pilot useful.

Discuss the case

What would you have done if Huda's manager insisted that mentoring should prepare her for management? A defensible response would clarify the organisational opportunity, Huda's current aspiration and the difference between a development offer and a compulsory career path. The organisation can explain future role needs; it should not misrepresent a mentoring agreement as consent to pursue a particular appointment.

What evidence would justify reporting a critical task as transferred? Attendance and a positive relationship are insufficient. The case uses authorised observation, explanation, supervised practice and technical verification. A different profession may require different evidence, but the distinction between exposure and demonstrated capability remains important.

Choosing assessment evidence for a developmental relationship

Assessment can make a useful question easier to explore, but it can also dominate a relationship before the person has had a chance to describe their work. Begin with the developmental purpose. Decide what is already known, what remains uncertain and whether an instrument would add relevant information. The HR Delivery catalogue offers different evidence types; it is not an instruction to administer every tool. ^[6] ^[12]

The descriptions here explain potential educational applications. They do not replace authorised administration, technical manuals, qualification requirements or validation for the intended language, population and decision. The public catalogue establishes what is offered and how it is described, not that every use is psychometrically justified. ^[19] ^[20]

When the question concerns preference

Leadership Preference Profile, or LPP, explores how a person naturally directs attention across the 3D9C leadership contribution landscape. It can help a coachee notice which contributions receive deliberate attention and which may require more conscious effort. A less

emphasised preference is not proof of low competence. A strong preference is not proof that colleagues experience effective behaviour.

A coach might ask, 'Your profile places greater emphasis on Direction. Which current responsibilities require you to invest more attention in Development, and what happens when you do?' The resulting experiment should be based on the role and the person's experience, not an instruction to make the profile numerically balanced.

Work Styles Indicator and related preference tools can support discussion of communication, pace or working habits. Conflict Response Assessment may help someone reflect on recurring choices in disagreement. Use these as hypotheses to compare with episodes. Do not explain every workplace difficulty through a preferred style or assign colleagues fixed roles from a profile.

When the question concerns judgement

Leadership Situational Judgement, or LSJ, provides evidence about choices in presented leadership scenarios. It may help identify themes for rehearsal: how

the participant balances evidence, stakeholders, standards and longer-term consequences. The next step is to explore reasoning and practise a comparable decision, not to assume that a scenario score describes everyday behaviour perfectly.

Contextual Leadership Assessment, or CLA, concerns task-specific direction and support. It can be useful when a manager wants to examine how they delegate or adapt support to a person's capability and commitment for a particular task. The practical conversation should remain task-specific. Avoid labelling an employee permanently as a low-readiness person.

Managerial Assumptions, Arguments and Conclusions, or MMAC, can support a focused question about reasoning. A participant may practise distinguishing an assumption from a stated fact or comparing the strength of competing arguments. The coach should not infer personality or character from an objective reasoning result.

When the question concerns experienced impact

Leadership 360 Feedback compares self, manager and other stakeholder perspectives on observable behaviour. It can reveal a useful difference between intention and experience. Keep rater groups and privacy controls intact. A lower peer score should lead to questions about situations and behaviour, not attempts to identify respondents.

A coachee might choose to practise closing meetings with a clear decision, owner and date after feedback suggests that colleagues experience ambiguity. The follow-up evidence could include meeting records and agreed observations. Repeating the entire 360 too quickly may add burden without answering whether the specific practice changed.

The practitioner should explain that feedback is perspectival. Different groups may observe different aspects of the role. Agreement can strengthen a hypothesis, while disagreement can identify a contextual difference. Neither justifies treating the average as a complete account of the person.

When the question concerns pressure and emotional patterns

Shadow Self Assessment, or SSA, explores strength-overuse patterns under pressure. Emotional Intelligence Assessment, or EQA, explores emotional capabilities relevant to work. These can support reflective discussion, but they are not clinical diagnoses and should not be used to label someone psychologically unsafe or unfit for employment.

A useful application is to identify one trigger, an early warning sign and an alternative behaviour to test. For example, a participant who recognises becoming overly directive during deadline pressure may agree to ask for the team's risk assessment before issuing instructions,

while retaining the right to act decisively where necessary. The experiment is observable and bounded.

Do not force personal disclosure to make the report feel deep. Participants can work with a relevant workplace episode. Where the discussion moves beyond competence or into significant distress, use the boundaries and referral routes described in Chapter 8.

Combined pathways need a specific reason

AC07 Leadership Discovery combines Leadership 360 Feedback, EQA and SSA. It brings together experienced impact, emotional capabilities and pressure patterns. The value lies in comparing distinct perspectives and testing explanations, not adding them into a single psychological verdict. A coach should be able to explain why each component is relevant to the agreed purpose.

AC06 General Leadership Development combines LSJ, LPP and CLA. It may be useful where a person is exploring judgement, preference and adaptability in a broader role transition. AC08 Combined

Leadership Assessment combines LSJ, a competency-based interview and LPP. Because an interview and readiness discussion can be consequential, clarify whether the engagement is developmental or part of a formal assessment process before using its evidence.

AC05 General Management Development combines MMAC, Managerial Situational Judgement and 5D16F. It can support a broad management-development conversation, but its sources retain different meanings. MSJ's published Direction-Development-Delivery structure should not be silently relabelled as the 3P management framework. A practitioner can connect findings to related work needs while preserving the original report taxonomy.

Mentoring does not require a diagnostic battery

A mentoring relationship may begin effectively with a development question, role information and relevant work examples. Learning Preference Questionnaire can help discuss how someone likes to approach learning, but it should not be used to restrict them to a

supposed fixed learning style. Preferences do not prove that a particular teaching method is uniquely effective for that person.

Career or strengths tools may broaden exploration when their purpose fits. They should not determine the mentor's career advice or establish a matching-compatibility score. The mentee's aspirations, actual opportunities and evidence of required work remain central. A test result should not overrule a person's stated wish to pursue specialist rather than managerial contribution.

For team coaching or a team-related goal, TWI, TCP and TPW provide different lenses on workstyles, contributions and team conditions. Aggregate team findings should not be attributed to a single manager or treated as evidence about an individual coachee. Team consent, confidentiality and facilitation require their own design.

An assessment-to-action record

Record the question, selected tool, intended interpretation, technical and language checks, participant information,

report access and the workplace action to be explored. After feedback, identify what the report supports, what it does not establish and what evidence will be gathered in work. This prevents a report from becoming the end product of development.

A completed example might read:

'Question: why does the leader's intention to invite challenge differ from peers' experience? Evidence: authorised Leadership 360 report, retained with its group protections, plus two participant-selected meeting episodes. Action: trial a revised sequence that invites concerns before the leader states a preference. Review: agreed observation and decision records after two meetings. Limit: no causal claim about personality and no identification of raters.'

The best use of assessment is often to improve the next question. A practitioner who knows when not to test is exercising professional judgement, not withholding a valuable service.

An eight-week practitioner learning pathway

This original learning pathway helps a new programme owner, coach or mentor practise the book's methods. It is not a qualification and does not establish competence for unsupervised work outside the participant's approved scope. Use an experienced practice lead or supervisor where the work requires it. The planned twenty-four hours are learning time, not a claim about the minimum preparation needed to become a coach.

Each week contains three planned hours: one hour of focused reading, one hour of structured practice and one hour of reflection, feedback or application planning. Real workplace application may require additional authorised time. Do not quietly add learning duties to an already full workload; agree release and support with the relevant manager.

Week 1 / Distinguish the service

Read Chapters 1 and 2 and the framework overview. Bring three fictional or suitably anonymised requests for development. Compare coaching, mentoring, instruction, management action and system improvement. Prepare a commission using C01. Your reviewer should challenge at least one assumption

about why a conversation is the right intervention. The output is a reasoned choice, including an alternative you rejected and the evidence that would change your mind.

Week 2 / Contract the relationship

Read Chapter 3. Rehearse the three-way relationship conversation and programme-owner annex in C02. One person plays a sponsor who asks for more information than the agreement allows. Practise explaining the legitimate evaluation route without disclosing private content. Review whether all four responsibilities are visible and whether a participant could safely request a rematch or raise a concern.

Week 3 / Listen before solving

Read Chapter 4. Use the fictional delegation brief and C04 observation record. Practise a fifteen-minute conversation, receive feedback and repeat one moment. The observer records exact questions and summaries rather than a global impression. Your reflection identifies where you added an assumption and how you checked it. The aim is not to ask the largest number of open questions;

it is to understand the person's work and purpose accurately.

Week 4 / Design an informative experiment

Read Chapter 5 and use C03. Convert a broad goal into a bounded practice, with a baseline, support, evidence and stopping condition. Ask a colleague to identify a system dependency that your first draft ignored. Revise the plan so that the person is not held responsible for an outcome beyond their control. The output should allow useful learning even if the intended result does not occur.

Week 5 / Give feedback and challenge

Read Chapter 6 and the assessment companion. Practise interpreting a synthetic difference between self and

stakeholder feedback. Keep preference, judgement and observed behaviour separate. Write two unsupported interpretations you deliberately avoided. Rehearse a specific challenge connected to the agreed goal, then design a follow-up practice rather than ending with the report.

Week 6 / Make mentoring purposeful

Read Chapter 7 and the Harbour case. Select one BRIDGE purpose, prepare a relationship agreement and compare two possible mentors using C05 and C06. Practise offering advice with its context and limits. Include a moment in which the mentee chooses a different route. The reviewer checks whether the relationship expands agency or subtly rewards agreement with the mentor.

Week 7 / Protect quality and capability

Read Chapters 8 and 10. Work through one confidentiality concern, one competence boundary and one digital-recording issue. Use C07 and C08 to identify the responsible route and the practitioner's development need. Do not invent local legal requirements. State which policy, professional standard or specialist must be consulted. The output is a safe next step, not an improvised diagnosis or investigation.

Week 8 / Evaluate and close

Read Chapters 9, 11 and 12 and the Madar case. Prepare a short continuation decision using C09-C12. Include the cost perspective, denominators, missing

evidence and alternative explanations. Rehearse a closing conversation that leaves the participant with a portable practice and future support. Your final review asks whether the proposed service is ethical, useful, applied and evidenced, and what still needs approval before use.

A practical completion review

Ask a reviewer to choose one of your records and use it in a new scenario. Where they cannot act because information is missing or a boundary is unclear, revise the record. Completion means you have produced a coherent set of practice outputs and identified your remaining development needs. It does not mean every future coaching or mentoring situation is now within your competence.

RESOURCE NAVIGATION

Your practical resources

Open the completed example first, then use its working record. Each resource preserves the purpose, evidence and limits of the method.

Worked example and reusable record	Page
<u>C01 / Commission the right developmental response</u>	93
<u>C02 / Three-way agreement and programme-owner annex</u>	96
<u>C03 / Goal, baseline and workplace experiment</u>	99
<u>C04 / Conversation observation and feedback</u>	102
<u>C05 / Mentoring purpose and relationship agreement</u>	105
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<u>C11 / Relationship closure and next support</u>	119
<u>C12 / Programme renewal decision</u>	121

WORKED RESOURCE / BEFORE THE MATCH

C01 / Commission the right developmental response

Purpose and users. Use this record when a sponsor requests coaching or mentoring but the actual need is not yet clear. The programme owner completes it with the sponsor, an appropriate operational colleague and representatives of the intended participants. It supports a commissioning decision, not a diagnosis of an individual.

Inputs. Bring the business or role objective, examples of the work causing difficulty, any relevant existing evidence, participant perspectives and known constraints. Do not begin by collecting a large assessment battery. First establish which question requires evidence and whether the proposed method can answer it.

How to use it. Describe the current situation in observable terms. Separate capability, motivation, authority, resources and process conditions. Compare coaching, mentoring, instruction, management action and system improvement. Choose the smallest coherent response that addresses the evidenced need. Record what would change the recommendation and who must approve the decision.

Completed example. Madar's sponsor asks for coaching to reduce late weekly plans. The evidence shows unclear delegation, late information and varied supervisory habits. The selected response combines operational clarification and coordinator instruction with optional, goal-specific coaching. The coaching purpose is to practise clearer authority agreements and proportionate intervention. The operations director retains accountability for the planning process. The learning manager owns the pilot and its information protocol.

Why this choice is defensible. The response does not assume that a personal conversation can repair a supplier dependency. It uses coaching where reflection and practice may help, while assigning the non-coaching work to the appropriate owner. A workshop-first option remains credible if further evidence shows that the main issue is common knowledge rather than individual practice.

Output and review. Produce a one-page commission with scope, exclusions, intended population, evidence, response, owners and review conditions. Review it before matching and whenever the purpose changes materially. The accompanying blank record is for a new

organisational use; the completed case values are not defaults.

Boundary. Do not use the record to decide clinical suitability, make an employment finding or label a person resistant. Those questions require their own qualified processes. An unresolved

safety, legal or formal employee-relations issue should not be disguised as a development commission.

REUSABLE WORKING RECORD

C01 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Decision and developmental need
Evidence, alternatives and suitability
Population, access and scope
Sponsor, owner and resources
Success evidence, limits and review

C02 / Three-way agreement and programme-owner annex

Purpose and users. Establish a trustworthy agreement between participant, practitioner and sponsor, with a separate programme-owner annex. This format meets the blueprint's three-way relationship requirement while retaining the four-way responsibilities of the 6A source system.^[2] The parties should discuss the agreement, not simply sign it.

Inputs. Use the approved commission, the participant's development purpose, practitioner scope, programme information protocol, local requirements and the agreed review timetable. The programme owner should have obtained the necessary privacy, employment and procurement review before offering a standard contract.

How to use it. Work through purpose, roles, goals, participation, information sharing, exceptions, records, support, review, complaints and exit. Ask each party to explain the most important boundaries in their own words. Resolve differences before the first substantive session. The annex records the programme owner's operational responsibilities even when they do not attend every relationship meeting.

Completed relationship agreement.

Amal and Reem agree six one-hour sessions over four months, focused on delegation in weekly planning. Amal owns her learning choices and the experiments she agrees. Reem supports reflection and practice within her competence. The sponsor provides protected time and resolves operational barriers. Progress discussions use the agreed goal and participant-approved examples. Private session notes and unrelated personal disclosures are not shared with the sponsor.

Completed annex. The learning manager owns matching, access, practitioner allocation, the approved record system, supervision arrangements, concerns and evaluation. The annex names an alternative contact if the usual sponsor is involved in a concern. Recording and automated transcription are off unless separately approved and agreed. The retention schedule is the organisation's reviewed schedule, not an invented period in this book.

Review and change. A midpoint meeting considers whether the goal, support and information arrangement still fit. A material change in role, purpose, practitioner or data use requires an

explicit review. No party may expand access to private information retrospectively because the programme is nearing its evaluation date.

Output. Keep the signed agreement accessible to the parties and store it under the approved controls. The participant

receives a clear copy. The blank working record is an educational starting point, not jurisdiction-specific legal drafting. Qualified local review is required before use as an organisational contract.

REUSABLE WORKING RECORD

C02 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Purpose, goals and parties

Confidentiality and information sharing

Roles, authority and programme-owner annex

Practical arrangements, access and exit

Review, concerns and agreement

WORKED RESOURCE / ASSESS TO APPLY

C03 / Goal, baseline and workplace experiment

Purpose and users. Help a participant and practitioner convert a broad development aim into a testable practice in real work. The record supports learning; it is not a performance-rating form. A sponsor or manager contributes only the support and evidence agreed in the relationship contract.

Inputs. Bring a recent work episode, the desired contribution, available baseline evidence, relevant constraints and an opportunity to practise. Identify any people affected by the experiment and obtain the permissions or operational authorisation required.

Method. State the situation and the behaviour to test. Separate the hoped-for work outcome from the participant's action. Record the baseline, the experiment, the support, the boundary and the evidence to review. Agree what would cause the experiment to stop or change. Use a small, informative attempt rather than several unrelated goals.

Completed example. Amal will agree the coordinator's authority, information sources, checkpoint and escalation conditions before the next two weekly plans. Her baseline is four recent cycles in which she frequently rewrote the draft

after late updates. The experiment is not 'never intervene'. She will first identify the decision or barrier and will intervene directly when the agreed service or safety threshold requires it. The coordinator will provide brief feedback on clarity and support.

Evidence and interpretation. Review the delegation agreement, the two plans, the reasons for interventions and the coordinator's agreed feedback. A completed plan alone is insufficient because another person may have rescued the work. A delay alone is also insufficient to show failure because a supplier dependency may explain it. Keep behaviour, result and explanation separate.

Next decision. Continue the practice, revise the authority boundary, seek a system change or choose a different development focus. Record the participant's conclusion in their own words. The most useful output may be a better question about the work rather than a favourable score.

Boundary. Never use a high-risk operational task as an unsupervised experiment. Where formal competence or authorisation is required, obtain it

through the appropriate route. The record does not replace technical supervision or an employment process.

REUSABLE WORKING RECORD

C03 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Work situation and desired change

Baseline evidence and alternative explanations

Small experiment and limits

Support, opportunity and feedback

Review evidence and next decision

WORKED RESOURCE / PRACTISE A SPECIFIC SKILL

C04 / Conversation observation and feedback

Purpose and users. Support a coach, mentor or manager practising a defined conversational skill. Use it with an observer in a fictional exercise or in real practice only with informed permission and approved information arrangements. It is a developmental observation record, not a validated assessment of professional competence.

Inputs. Agree the target skill, the participant brief, the observation period and the boundaries. Examples of target skills include checking the person's question before advising, distinguishing observation from interpretation, or helping the participant own the next action. Avoid trying to rate every possible skill in one short conversation.

Method. The observer records what was said or done, the context and the apparent effect. They distinguish direct observation from inference. Feedback begins with the practitioner's own reflection, then adds one useful strength and one change to test. Repeat the relevant moment so the practitioner can use the feedback immediately.

Completed example. In a fifteen-minute practice, Reem asks Amal to describe a recent planning episode, summarises the

decision boundary and checks whether the summary fits. The observer records the exact summary and Amal's correction. Later, Reem suggests a checklist before asking what Amal has already tried. The feedback recognises the accurate summary and proposes checking the participant's existing approach before offering a tool.

Repeated attempt. Reem returns to the advice moment and asks, 'What have you already tried, and what did it show you?' Amal explains that a checklist exists but does not specify authority. Reem then asks which part of the agreement needs to change. The revised conversation produces a more relevant action than simply adding another checklist.

Output and follow-up. The practitioner records one practice commitment and the setting in which it will be tested. The observer does not retain private participant material beyond the agreed purpose. Where the exercise reveals a competence or ethical concern, use the programme's support route rather than treating it as ordinary feedback only.

Boundary. Do not infer a practitioner's overall capability from one rehearsal. Do not equate a confident style with effective



coaching. The record makes a specific behaviour visible and supports the next learning step.

REUSABLE WORKING RECORD

C04 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Conversation purpose and permission

Observed words or actions

Interpretation and alternative explanation

Feedback question and response

Practice priority and review

C05 / Mentoring purpose and relationship agreement

Purpose and users. Clarify why a mentoring relationship exists and how it will operate. The mentee and mentor complete the relationship record, supported by the programme owner. The programme's primary BRIDGE purpose should be clear before individual matching. ^[3]

Inputs. Bring the mentee's development question, relevant role or career information, the mentor's experience, programme purpose, available practice opportunities and the information protocol. Discuss aspiration directly rather than inferring it from a manager's nomination.

Method. Select one primary purpose, describe the useful experience the mentor can contribute and identify the limits of that experience. Agree preparation, meetings, advice, introductions, confidentiality, conflicts, review and exit. Use RELATE to structure the relationship, not as a rigid script for every session.

Completed example. Harbour's primary purpose is Generational Knowledge. Huda wants to recognise client-priority signals and understand technical escalation in specified service situations. Mariam can offer relevant experience, authorised

observation and reflective review. The agreement does not promise a management appointment or require Huda to pursue one.

Practical commitments. Huda prepares a recent work example and questions before each monthly meeting. Mariam offers experience with its context and limitations, asks Huda to compare alternatives and obtains permission before making introductions. Technical authorisation remains with the operational owner. The pair reviews fit after the first two meetings and can request rematching through the programme owner.

Evidence. The relationship produces a decision-cue record, a supervised practice opportunity and a closing account of learning. The programme receives agreed participation and evaluation information, not a detailed private account of Huda's career reflections.

Boundary. A mentor's endorsement is not a substitute for a fair appointment process. If the mentor joins a relevant selection or succession panel, disclose the relationship and follow the organisation's conflict rules. The agreement should expand informed choice, not make the



mentee dependent on the mentor's preferred route.

REUSABLE WORKING RECORD

C05 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Primary BRIDGE purpose and development need
Mentor and mentee roles
Boundaries, confidentiality and expectations
Experience, advice and action
Review, rematching and closure

WORKED RESOURCE / RELEVANCE BEFORE PRESTIGE

C06 / Matching and rematching decision

Purpose and users. Provide a transparent basis for allocating coaches or mentors and a dignified route when a match does not fit. The programme owner maintains the record with input from the participant and practitioner. It is not a compatibility test.

Inputs. Use the development purpose, practitioner competence and availability, language and access needs, reporting relationships, conflicts and participant preferences. Collect only information relevant to the match. Do not request unnecessary personal or sensitive data to make the form appear comprehensive.

Method. Check non-negotiable suitability and exclusions first. Compare relevant experience and practical availability. Offer an introductory conversation, explain alternatives and record the informed choice. Review fit early. A rematch can be requested without requiring a formal complaint; material conduct concerns still follow the appropriate independent process.

Completed example. Huda could be paired with a senior manager who has influence but limited relevant experience and little time, or Mariam, who regularly handles the client-interface work Huda

needs to learn. The programme selects Mariam after both parties confirm purpose and availability. The record states that seniority alone was not treated as evidence of fit.

Rematch example. Another mentee's mentor is transferred to a role with extensive travel. The pair has no personal disagreement, but the planned observation opportunities disappear. The programme records a practical mismatch, offers a new mentor and confirms what information can be transferred. It does not label the mentee disengaged or ask the original mentor to disclose private conversation content.

Output and assurance. Maintain the rationale, agreed start, review date and any restrictions. Review aggregate matching and rematching patterns for access or capacity problems. A high rematch rate may reflect weak design, but a very low rate may also reflect reluctance to raise concerns. Interpret the pattern with participant experience.

Boundary. Personality, nationality or a shared background should not become an automatic matching rule. Discuss relevant preferences respectfully, but do not claim a validated match quality from



unvalidated combinations of assessment scores.

REUSABLE WORKING RECORD

C06 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Need, relevant experience and access

Candidate matches and conflicts

Participant preferences and decision

Preparation and check-in

Rematch trigger, support and outcome

WORKED RESOURCE / A CLEAR ROUTE WHEN PURPOSE CHANGES

C07 / Ethical concern and referral record

Purpose and users. Help a practitioner and authorised programme owner record a material concern and the responsible next step. It supports the organisation's established process; it does not replace clinical, legal, safeguarding or investigative records. Access must be restricted to those with a legitimate role.

Inputs. Record the factual concern, the agreed purpose and boundaries, immediate safety considerations, relevant policy or contract terms and the specialist route available. Avoid speculative diagnoses, unnecessary detail or unsupported allegations presented as findings.

Method. Address immediate risk through the verified route. Clarify what you know, what is uncertain and what competence or authority is needed. Consult appropriately, explain the boundary to the participant where possible and record the decision, owner and follow-up. Share the minimum necessary information under the applicable rules.

Completed example. A participant's sessions move from a work-transition goal to persistent severe distress. The coach does not diagnose the cause or claim to provide treatment. They explain that the

concern deserves qualified support, discuss the organisation's verified support route and consult the practice lead within the agreed information limits. The developmental work pauses while suitability and support are reviewed.

Alternative example. A sponsor asks for private session notes to inform a promotion decision. The programme owner declines the request under the agreement, offers a review of authorised progress evidence and explains that formal readiness assessment requires a separate process. The concern record captures the purpose conflict and the action taken, not private session content.

Output. A concise account of the concern, action, responsible owner, information shared, reason and next review. Confirm that any incident notification or retention requirement has been addressed through the relevant specialist process.

Boundary. This is not a universal legal reporting protocol. Country, entity, sector and professional obligations differ. Programme owners must establish local routes before launch, including an alternative where the usual sponsor or manager is implicated.

REUSABLE WORKING RECORD

C07 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Concern and immediate protection

Role, competence and agreed boundaries

Consultation and authorised escalation

Minimum necessary record and access

Follow-up, referral or re-contracting

WORKED RESOURCE / CAPABILITY WITHIN AN APPROVED SCOPE

C08 / Practitioner development and supervision plan

Purpose and users. Connect a coach's or mentor's development with observed practice, support and the scope of work they may undertake. The practitioner completes it with a practice lead or supervisor. It should support growth and safe allocation, not a public ranking.

Inputs. Bring relevant preparation, observed practice, feedback, case reflections, current scope and the demands of the programme. A qualification or senior role may be relevant, but neither replaces evidence about the actual service.

Method. Identify one or two practice priorities. Choose observation, rehearsal, supervision, study or co-working that addresses the priority. Agree the evidence to review and the conditions for expanding scope. Record what remains outside competence and where specialist support is required.

Completed example. Reem's observation shows accurate summaries but a tendency to offer tools before exploring the participant's existing approach. Her development plan includes two fictional rehearsals focused on inquiry before advice, one consented practice review and

a supervision discussion about her wish to be immediately useful. She records exact examples rather than rating herself 'more reflective'.

Review. After four weeks, the practice lead reviews whether Reem now checks the participant's question and existing attempts before offering a tool. One improved rehearsal is encouraging but not treated as proof across all contexts. Her approved scope remains routine workplace development, with consultation required for complex ethical or psychological concerns.

Mentor adaptation. A mentor may use the same structure to practise advice with context and limits, or to improve knowledge-transfer demonstrations. The observation criteria should reflect mentoring rather than forcing every practitioner into a coaching style.

Output and boundary. Keep the plan, evidence, support and review date in the appropriate capability record. The plan is not professional accreditation and does not permit work beyond the practitioner's competence or organisational authorisation.

REUSABLE WORKING RECORD

C08 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Current scope and evidence of practice

Priority skill and learning need

Observed practice and supervision

Support, boundaries and workload

Review evidence and future scope

WORKED RESOURCE / MAKE DELIVERY FEASIBLE

C09 / Programme service and capacity plan

Purpose and users. Translate a programme promise into an owned service with realistic capacity. The programme owner completes it with the sponsor, practice lead, operational managers and relevant support specialists. Use it before inviting participants.

Inputs. Bring the intended population, pathway, session or meeting assumptions, practitioner availability, preparation and supervision requirements, participant release time, technology arrangements and evaluation plan. Separate cash expenditure from internal time values.

Method. Map the participant journey, calculate contact and non-contact effort, identify bottlenecks and confirm release arrangements. Define responsibility for matching, concerns, records, evaluation and closure. Test the complete experience through a bounded pilot.

Completed example. Madar plans 24 participants, six sessions each and six coaches. Contact time is 144 hours. Preparation adds 36 hours and supervision attendance adds 36 hours, giving 216 coach-hours. Each coach therefore needs 36 planned hours. The

programme owner also plans forty coordination hours and twenty evaluation hours. Participant session time totals 144 hours.

Interpretation. These calculations do not prove that six coaches are sufficient for every case. Complex concerns may require additional consultation, and absences may affect capacity. The plan identifies a reserve arrangement and a route for pausing new matches rather than silently overloading practitioners.

Decision. The sponsor approves the pilot only after site managers confirm release time and the programme owner tests the information and rematching processes. The cost view is documented separately with its assumptions and exclusions. Operational redesign remains outside the coaching budget.

Boundary. Do not present the case's hourly values as market rates or infer a universal coach-to-participant ratio. Use actual organisational requirements and qualified review of the service's risks. The output is a feasible delivery plan, not evidence that the intervention will be effective.

REUSABLE WORKING RECORD

C09 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Population, pathway and demand
Practitioner capacity and preparation
Participant release and support
Coordination, costs and assumptions
Risks, access and review

WORKED RESOURCE / EVIDENCE FOR A DECISION

C10 / Contribution and evaluation record

Purpose and users. Plan and report the evidence needed to continue, adapt or stop a developmental programme. The programme owner works with an evaluation colleague, sponsor and participant representatives. The record keeps implementation, learning, application and outcomes distinct.

Inputs. Use the programme's contribution hypothesis, baseline, measures, data permissions, cost perspective, relevant operational changes and the decision date. Define the main questions before results are known.

Method. State each expected link, its assumptions and the evidence available. Record denominators, missing data and alternative explanations. Distinguish participant self-report from corroborated work evidence. End with a decision, conditions, owner and review date rather than a satisfaction headline.

Completed example. Madar offers 24 places; 22 participants begin, 20 complete at least five sessions and 18 submit application records. Twelve records contain corroborated examples, four contain self-report only and two do not yet

demonstrate the planned behaviour. The report preserves these categories. It does not convert the twelve corroborated records into an unqualified programme success rate.

Work outcome. On-time plans rise from 72% to 81%, but a supplier-response change occurs during the same period. The evaluation describes a plausible coaching contribution alongside the operational intervention and a limited baseline. It does not claim that coaching caused a nine-percentage-point improvement.

Decision. Continue with a smaller second cohort after release time and matching improvements are in place. Strengthen the baseline and application-evidence process. Review access for those who did not begin or submit records without pressuring them to disclose private session information.

Boundary. The record is not a causal evaluation design by itself. Larger or high-stakes claims may require specialist methods. A serious ethical issue can block continuation regardless of positive average experience scores.

REUSABLE WORKING RECORD

C10 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Evaluation question and decision owner

Baseline, measures and denominators

Evidence sources and consent

Findings, alternatives and limitations

Continue, adapt, pause or stop

WORKED RESOURCE / LEAVE THE LEARNING WITH THE PARTICIPANT

C11 / Relationship closure and next support

Purpose and users. Conclude a coaching or mentoring relationship with a clear account of learning, application, remaining needs and information responsibilities. The participant and practitioner complete it together; the sponsor receives only the agreed summary.

Inputs. Bring the original purpose, agreed revisions, application evidence, feedback, remaining questions and the programme's retention and closure rules. Do not rewrite the original goal merely to make the ending appear successful.

Method. Review what changed, what did not and why. Identify a portable practice, future support, warning signs of relapse or dependency and the next review outside the relationship. Confirm records, access and contact arrangements. Discuss extension only where a clear new purpose justifies it.

Completed example. Amal can now explain the difference between removing a planning barrier and taking over the coordinator's task. Her retained practice is to agree authority and checkpoints before work starts and ask which decision is needed before intervening. She will

request feedback from the coordinator during two more demanding cycles and discuss any operational constraints with her manager.

Information closure. Amal receives her own goal-and-action summary. The sponsor receives the approved application summary. Reem's private notes remain subject to the agreed controls. The programme owner confirms the closure status and retention requirements. No automatic transcription or additional report is created.

Mentoring adaptation. Huda records the critical situations she can now interpret, the supervised demonstrations completed and the exceptions that still need experience. Her next support includes a community of practice and an authorised technical supervisor. The ending does not imply she is ready to replace her mentor.

Boundary. Ending a formal relationship does not release private information for other purposes. An informal connection may continue, but its expectations should be clear. A safe early ending or rematch can be a responsible outcome, not a personal failure.

REUSABLE WORKING RECORD

C11 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Original purpose and current progress

Learning and application evidence

Unfinished work and future support

Information, records and confidentiality

Closure agreement and follow-up

WORKED RESOURCE / CONTINUE, ADAPT, PAUSE OR STOP

C12 / Programme renewal decision

Purpose and users. Support an accountable decision about the next programme cycle. The sponsor and programme owner review the evidence with the practice lead, operational owners and relevant specialists. Participants contribute through the agreed evaluation routes.

Inputs. Bring the commission, delivery evidence, access patterns, practitioner capability, application findings, costs, concerns, unresolved risks and changes in organisational need. Separate private relationship content from legitimate programme evidence.

Method. Test whether the purpose remains relevant, whether the service is suitable, whether delivery is feasible and whether the evidence supports further use. Compare continuation with adaptation or an alternative intervention. State conditions and assign owners. A positive average cannot compensate for a material unresolved boundary failure.

Completed example. Harbour renews its Generational Knowledge pathway for a smaller set of critical situations. It retains transparent opportunity allocation, rematching and technical verification. It adds a community of practice for

knowledge that benefits a wider population. It does not expand immediately into all six BRIDGE purposes because each would need its own design and evaluation.

Conditions. Operational owners must identify practice opportunities before matching. Mentors must confirm availability. Technical authority must remain separate from relationship feedback. The programme owner will review whether participants with comparable needs receive fair access to assignments. Named data remains restricted under the approved schedule.

Decision record. The sponsor approves the next cycle with those conditions, a named owner for each and a review date. Unresolved continuity gaps are referred to the succession process rather than hidden inside mentoring completion statistics. The communication to participants explains what has changed and why.

Boundary. Renewal is not proof that the framework is validated or that the programme caused business outcomes. It is an organisational judgement based on the current evidence, obligations and alternatives. Keep the reasoning open to review when conditions change.

REUSABLE WORKING RECORD

C12 / Your working record

Use the preceding completed example. Record actual evidence, agreed owners and relevant limitations; adapt the fields to the approved organisational purpose.

Programme purpose and current evidence**Access, quality and application****Costs, capacity and unresolved risks****Options and reasoned decision****Owners, conditions and next review**

REFERENCE / LANGUAGE THAT HELPS PRACTICE

A working glossary

Agency. The person's capacity and legitimate opportunity to make informed choices. A supportive relationship should expand agency rather than create dependence on the practitioner.

Alliance. A working agreement about goals and tasks within a relationship that can support honest discussion. Rapport contributes, but a pleasant connection alone does not establish a useful alliance.

Application. Use of learning in actual work. It should be distinguished from insight during a session, course attendance or intention to change.

Assurance. Ongoing checks that the service is appropriate, ethical, competently delivered and supported by evidence proportionate to the decision. It is not only a final audit.

Baseline. A defined account of the starting position, with its source, period and limitations. A baseline can be qualitative, quantitative or mixed.

BRIDGE. The HR Delivery mentoring portfolio-purpose model. Its six categories are alternative primary purposes, not six chronological stages.

Coach. A practitioner supporting reflection, choice and learning within an agreed purpose and competence boundary. A coaching role should not be

confused with undisclosed assessment or management authority.

Coachee. The participant in a coaching relationship. In team coaching, the client and confidentiality arrangements require a design appropriate to the team, not merely a collection of individual contracts.

Confidentiality. Agreed protection of information, subject to specified permissions and applicable exceptions. It is not a promise of absolute secrecy or guaranteed anonymity.

Contribution. A reasoned account of how an intervention may have helped an outcome alongside other influences. It is weaker than a well-supported causal attribution and should be described accordingly.

Developmental experiment. A bounded, ethical attempt to practise a behaviour and learn from what happens. It needs a purpose, opportunity, support, evidence and a stopping or revision condition.

Evidence type. The kind of information a source provides. Preference, scenario judgement, stakeholder experience, observed performance and technical credentials answer different questions.

Four-way contracting. In the source 6A system, explicit responsibilities for participant, coach, sponsor and

programme owner. A three-way relationship agreement requires an annex or equivalent arrangement to preserve the fourth responsibility.

Goal attainment. Progress against a defined goal. Locally constructed goal scales are not automatically comparable across people or equivalent to validated psychometric measures.

MENTOR. The HR Delivery organisational mentoring system: Mandate & Mobilise, Evidence & Engineer, Nominate & Match, Train & Contract, Operate & Assure, Review & Renew.

Mentor. A person using relevant experience, advice, challenge and connections to support another person's development. Seniority alone does not establish fit or competence.

Mode switching. Making an explicit transition between coaching, advice, instruction, assessment or management. The other person should understand which role is operating and what choices remain open.

Programme owner. The person accountable for designing and coordinating the service, including access, operations, records, support and

evaluation. This role does not confer access to all private session content.

RELATE. The HR Delivery relationship-practice model for mentoring. It connects readiness, expectations, learning, advice, action and review without prescribing an inflexible conversation script.

Sponsor. The person or body funding or enabling the legitimate organisational purpose. Sponsorship should provide resources and opportunity without covert control over private reflection.

Supervision. A structured reflective process supporting practitioner judgement, ethics and development. Its purpose and information boundaries should be distinct from sponsor reporting.

Transfer. The use, adaptation and maintenance of learning in work. Transfer depends on opportunities and conditions as well as the participant's intention.

Validated use. An interpretation or decision supported by relevant evidence for the instrument, population, language and purpose. A framework diagram or catalogue description does not establish it.

One portfolio. A purposeful selection.

The supplied directory contains 29 frameworks across seven areas. The map below preserves every entry and offers original routing guidance for this book. It is a reference, not a requirement to apply every model to every assignment. The same CCF abbreviation is used in the source for two different frameworks; the full names remain visible here. ^{[1] [11]}

Strategy and Planning

HR Strategy Framework (HRSF); Workforce Planning Framework (WPF); HR Department Provision and Capability Framework (HRCF).

Use HRSF to establish the organisational contribution a programme should support. WPF identifies capability demand and populations that may need development. HRCF tests whether HR has the provision and capacity to operate the service. These frameworks inform commissioning; they do not determine private relationship goals without the participant.

Attraction and Retention

Value Proposition Framework (VPF); Talent Attraction Framework (TAF); Onboarding and Induction Framework

(OIF); Retention Strategy Framework (RSF).

VPF asks whether development is part of a credible employment promise. TAF concerns access to talent rather than coaching suitability. OIF supports role-transition mentoring and practical integration. RSF helps investigate retention conditions; do not promise that coaching alone will prevent departure or use private sessions as retention intelligence.

Organisation Design and Change Management

OD Diagnostic Framework (ODDF); Capability Assessment Framework (CAF); Change Management Framework (CMF); Organisational Design Framework (ODF); Competency and Capabilities Framework (CCF); Job Evaluation Framework (JEF).

ODDF can investigate system conditions that emerge as a broader question. CAF supports relevant capability evidence. CMF examines change-specific readiness. ODF may be needed where unclear work or authority is the main barrier. Competency and Capabilities CCF defines observable expectations. JEF concerns job

value, not a coach's view of an individual's worth.

Talent Development

Training Needs Analysis Framework (TNAF); Individual Contributor Development Framework (ICF); Leadership Development Framework (LDF); Team Development Framework (TDF); Career Planning and Career Paths Framework (CPF); Coaching and Mentoring Framework (CCF); Succession Planning Framework (SPF).

TNAF separates learning needs from other barriers. ICF, LDF and TDF provide relevant expectations for contribution, leadership and team practice. CPF supports informed career options. Coaching and Mentoring CCF is the central source architecture here. SPF uses separately governed role-readiness evidence; it should not absorb private coaching disclosures by default.

Engagement, Wellbeing and Culture

Organisational Engagement Framework (OEF); Organisational Wellbeing Framework (OWF); Staff Satisfaction Framework (SSF); 3E Culture Framework (CDF).

OEF, OWF and SSF address different forms of organisational listening and working experience. They may identify a need for systemic action rather than individual

development. The 3E Culture Framework examines environment, expectations and execution. Use aggregate insight responsibly; neither a team score nor a culture label diagnoses an individual participant.

Performance Management and Reward

Performance Management Framework (PMF); Compensation and Reward Framework (CRF).

PMF connects expectations, dialogue and development with management accountability. It helps identify when a conversation is a formal performance responsibility rather than optional coaching. CRF governs reward choices; a mentor's encouragement should not become an unauthorised pay or promotion promise.

HR Service and Analytics

HR Service End User Feedback Framework (EUFF); HR Analytics Framework (HRAF); HR AI Framework (HRAIF).

EUFF can examine the participant's service journey. HRAF connects an evaluation question with evidence and a decision. HRAIF supports human-governed review of proposed AI use, including transcription or summaries. None removes the need for appropriate data, professional and local legal controls.

SOURCE TRAIL / CHECKED 10 OCTOBER 2026

Sources and further study

Source frameworks, professional standards and research are different kinds of evidence. Read the notes before extending a claim.

1. HR Delivery. Framework Directory (October 2026).

Supplied portfolio source. Preserved framework names and architecture; see coaching and mentoring p.30, succession p.31, leadership p.27, onboarding p.15, capability assessment p.19 and performance p.38.

[Open the source](#)

2. HR Delivery. Workplace Coaching White Paper, second edition (2026).

User-supplied practice source retrieved from the project Library. Basis for the 6A stages, three operating levels, six enablers, four-way contracting and the Ethical, Useful, Applied and Evidenced quality lens. Not independent validation of 6A.

[Open the source](#)

3. HR Delivery. Workplace Mentoring Extensive Toolkit (August 2026).

User-supplied practice source. MENTOR governs the programme; BRIDGE selects its purpose; RELATE guides the relationship. Original toolkit IDs and the new ebook resource IDs are separate.

[Open the source](#)

4. HR Delivery. Succession Planning Framework and Practitioner Toolkit, Practitioner Edition 2026.

User-supplied S8 source, including reference scoring and governance settings (pp.108-120 and 195-198). Settings require organisational validation; they are not universal psychometric cut-offs. The book preserves the published rules and makes original worked applications explicit.

[Open the source](#)

6. HR Delivery. Assessment Services Brochure (2026).

User-supplied 67-page catalogue, read through the project Library. Tool descriptions and combinations are a catalogue, not technical validation evidence. Use the authorised manual and current language/version information before administration.

[Open the source](#)

11. HR Delivery. The framework collection.

Public portfolio checked 10 October 2026. The 29 directory entries are signposted by relevance rather than repeated as unrelated chapters.

[Open the source](#)

12. HR Delivery. Assessments, live catalogue.

Checked 10 October 2026. Catalogue availability and tool purposes only. No access to private participant data or unpublished technical validation is claimed.

[Open the source](#)

13. International Coaching Federation. ICF Code of Ethics (effective 1 April 2025).

Professional obligations concerning agreements, information boundaries, conflicts, competence and technology. Its status is a professional code; it does not replace applicable law or establish that a programme is accredited.

[Open the source](#)

14. Global Code of Ethics for Coaches, Mentors and Supervisors, version 4 (December 2025).

Current version verified through the Global Code website and EMCC announcement of 15 February 2026. Read the current code and your professional body's procedures. The book does not reproduce the code or claim compliance certification.

[Open the source](#)

15. CIPD. Coaching and mentoring factsheet.

Professional guidance distinguishing approaches, connecting them with learning strategy and recognising the power issues in manager-as-coach practice. Consult the current full text.

[Open the source](#)

16. Jones, R. J., Woods, S. A. and Guillaume, Y. R. F. (2016). The effectiveness of workplace coaching.

Journal of Occupational and Organizational Psychology, 89, 249-277. Meta-analysis of 17 studies; manager-subordinate and peer coaching were excluded. Average findings cannot be transferred directly to a particular programme or to line-manager conversations. DOI: 10.1111/joop.12119.

[Open the source](#)

17. Allen, T. D., Eby, L. T., Poteet, M. L., Lentz, E. and Lima, L. (2004). Career benefits associated with mentoring for proteges.

Journal of Applied Psychology, 89, 127-136. Meta-analysis distinguishes subjective and objective career outcomes; objective associations were small. It does not establish that every mentoring match causes a promotion. DOI: 10.1037/0021-9010.89.1.127.

[Open the source](#)

19. International Test Commission. Guidelines on Test Use.

Professional test-user responsibilities: intended use, competence, participants' rights and contextual interpretation. A catalogue description is not a substitute for technical documentation.

[Open the source](#)

20. International Test Commission. Guidelines for Translating and Adapting Tests, second edition.

Eighteen guidelines covering preconditions, development, confirmation, administration, scoring and documentation. Translation alone does not establish comparable score meaning.

[Open the source](#)

26. Smither, J. W., London, M. and Reilly, R. R. (2005). Does performance improve following multisource feedback?

Personnel Psychology, 58, 33-66. Review and meta-analysis of 24 longitudinal studies; improvements in others' ratings were generally small.

Feedback needs purposeful follow-through. DOI: 10.1111/j.1744-6570.2005.514_1.x.

[Open the source](#)

33. HR Delivery. Ebook Library Publishing Blueprint (7 October 2026).

User-supplied commissioning source. D6-D9 briefs appear on pp.55-58. Guides the distinct scopes, educational architecture, worked resources and complete 36-activity requirement for D9.

34. HR Delivery. Branding Pack, version 2.0 (28 September 2026), and HR Strategy That Delivers editorial master.

Supplied design and artwork sources. Original logo, approved photography and relevant framework artwork are retained. Photography is conceptual, not documentation of the fictional cases.

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