



Agree

Framework & toolkit

Create a trustworthy coaching relationship with clear rights, roles, information boundaries and working arrangements.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

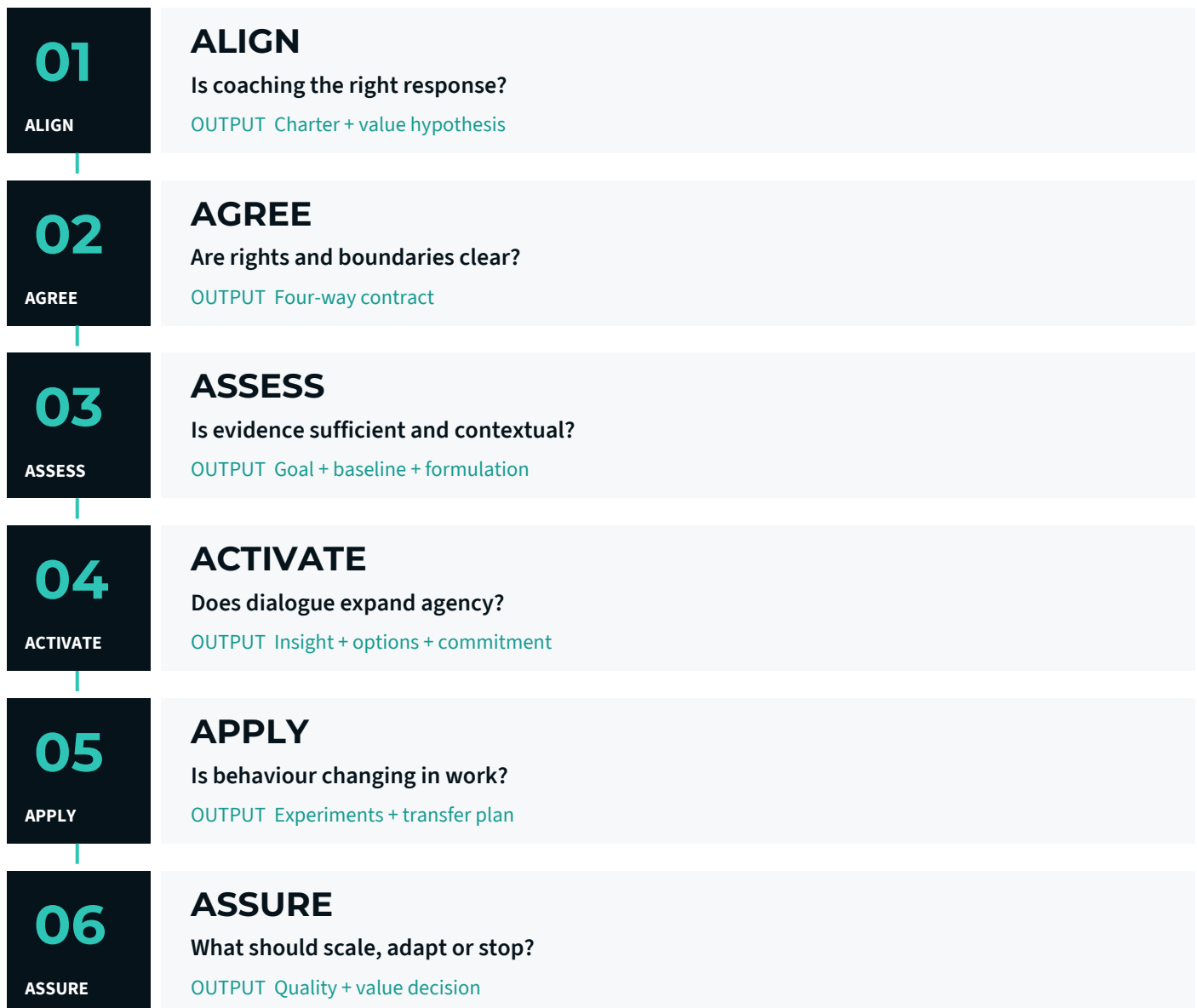
06 Assure

19 tools and activities | Complete guides, worksheets and examples

VISUAL PRACTICE EDITION / STANDALONE SERIES / OCTOBER 2026

Six connected responsibilities. One purposeful coaching journey.

Preserve the whole system. Return to an earlier A whenever the purpose, evidence, relationship or work conditions change.

**ETHICAL | USEFUL | APPLIED | EVIDENCED**

BASIS H01 pp.6-8 / H02 / H03 / H04 | New application layout; source terminology retained



The session sits inside a wider system.

Three operating levels and six enablers support every A. Assurance is continuous, not a final administrative step.

ORGANISATION

Policy, portfolio, culture, resources and governance. Leaders decide where coaching belongs and act on systemic barriers.

PROGRAMME

Population, pathways, matching, operations and evaluation. The owner provides fair access, suitable competence and a trustworthy service.

ENGAGEMENT

Contract, goals, sessions, application, review and closure. Coach and coachee agree the work and protect the relationship.

SIX ENABLING CONDITIONS

Enabler	Practical requirement
Strategic sponsorship	Purpose, boundaries and intended contribution.
Coach capability	Competence, observed practice, supervision and referral.
Culture and manager ecosystem	Time, trust, feedback and work opportunity.
Equity and access	Fair eligibility, matching and adjustments.
Data and technology	Minimum data, secure use and transparent responsibility.
Governance and improvement	Accountability, concerns, evaluation and renewal.

BASIS H01-H04 | These are enabling conditions, not six additional stages

AGREE / INTRODUCTION

Make the agreement workable.

What this guide is for

Agree contains the complete contracting and relationship section of the Visual Practice Edition. It combines programme and engagement agreements with practical activities for chemistry, shared goals, confidentiality, feedback, participation and session preparation. The purpose is to create useful freedom within boundaries that everyone understands.

Keep all four parties visible

The source framework identifies coachee, coach, sponsor and programme owner. Responsibilities remain even when one person holds more than one role. Clarify the line manager's support as well. Begin with the purpose established in Align, then identify whose authority, resources, information and agreement the engagement requires.

Make information flows concrete

Distinguish attendance, goals and agreed updates from assessment detail and private session notes. Use realistic requests to test understanding. Employer funding is not automatic permission to receive session content. Retain the source guidance on applicable duties, records, technology, referral and the limits of confidentiality.

Agree how to work together

The activity worksheets support conversations about challenge, silence, questions, feedback and access needs. The coachee can question an interpretation or decline an activity. Agree how concerns, a mismatch, a change of purpose or an early ending will be handled. Check understanding rather than relying on a signature alone.

Work through the first session

The full first executive coaching session design follows the tools, including its run sheet and annotated dialogue. Read it alongside the contracting material rather than treating it as a mandatory script. The shared foundation pages provide the original help boundaries, pause routes and guidance on protecting information.

Before moving on

Use the Agree gate: are rights and boundaries clear? Leave with a usable four-way contract and practical information arrangements. Keep the agreement open to review. Move to Assess when the purpose and permissions are clear enough to gather relevant evidence, and return here when the relationship or context changes.

THE AGREE DECISION

Are rights and boundaries clear? Minimum output: Four-way contract.

Based on the main manual: Agree practitioner brief and operating route, master pp. 113-114.

A FOREWORD PREPARED FOR DR PHILLIP WELSH

Trust starts with the agreement.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

A foreword for the Agree guide

Protect useful freedom

The agreement around coaching should make honest work possible. It should help an executive understand what the relationship is for, what can be explored, what may be shared and how to raise a concern. Clarity is not the opposite of warmth. It gives the relationship a more dependable foundation.

Name the real relationships

In organisational coaching, there is usually more than one interested party. The coachee, coach, sponsor and programme owner may each understand success differently. Those differences deserve a conversation before they become a source of mistrust. A sponsor's legitimate wish to see useful change does not remove the need to protect private reflection.

Test the understanding

This guide offers agreements, information maps and practical rehearsals. I encourage you to use them with examples. What would happen if a sponsor asked for session notes? How would a new assessment be introduced? What could the coachee do if the match did not feel useful? Answers in plain language are more valuable than impressive terms that the parties interpret differently.

Keep permission alive

A good agreement is revisited when circumstances change. New responsibilities, a different sponsor or an unhelpful activity may require a fresh conversation. My hope is that these tools help coaches build relationships in which both support and challenge are welcome, concerns can be voiced and each person knows what they have agreed to. That is practical preparation for the work of learning.

New foreword text prepared for review and approval; approval is required before publication under his name.



CONTENTS / THIS GUIDE

Find your way through Agree.

All page numbers on this contents page and in the new tool index refer to this guide.

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GUIDE / WORKSHEET / EXAMPLE

The original 19 tool identifiers and the visual activity designs are retained. Open the local index for the three pages of each tool.



READ THIS FIRST

One guide. The connected 6A system.

A smaller working volume, with the original content and visual activities retained.

Use local pages for this guide

The contents and tool index at the front use the new guide page numbers. Each retained page has two references in its footer: GUIDE is its position in this PDF; MASTER is its original page in the 606-page Visual Practice Edition.

Read retained references correctly

Numbers printed inside original directories, examples, session indexes and source notes have been retained. They refer to the master manual unless a different source is named. Use the local index for this guide, the original master index in Align for the full library, or Source_Page_Map.csv in the ZIP.

Open the complete tool

Choose an activity by its purpose. Read the guide, use the matching visual worksheet and study the fictional example. Original T and X identifiers have not changed. The working record is not an instruction to use every exercise or collect every possible item of information.

Keep the visual working formats

The wheels, maps, ladders, plots and charts are copied from the redesigned manual, not converted into text summaries. Type into the existing PDF fields in a compatible reader. Use its drawing tools or paper for plotted positions. The existing Designer Edition Excel workbook remains the numerical working companion.

Move between the six guides

Contents, Model and Tools in the footer return to this guide. Suite opens its six-volume locator. Links to another A point to the companion PDF. Extract all six PDFs into the same folder and keep their filenames; cross-file navigation depends on the PDF reader.

Protect the coaching relationship

Keep one engagement per authorised working copy and share only agreed outputs. Private reflection, assessment material and sponsor updates are not interchangeable. Refer to the retained contracting, privacy, pause and referral guidance. A standalone guide does not remove the need for the other 6A responsibilities.

Understand the source continuity

Every page of the 606-page main manual appears in at least one of the six guides. Shared foundations and references are repeated to support standalone use. Original whole-manual opening pages are retained in the Align archive. The new front matter provides orientation; it does not replace or re-score any source tool.

Choose the next useful step

Use the Agree gate: Are rights and boundaries clear? Retain the evidence, the coachee's choice, the boundary and the next responsible owner. Return to another A when the purpose, agreement, evidence or work conditions change.



Open the guide. Use the worksheet.

These are local guide pages. Original tool identifiers are unchanged.

ID	Tool / activity	Guide	Sheet	Example
T13	Four-way contracting canvas	015	016	017
T14	Coachee agreement	020	021	022
T15	Sponsor briefing guide	023	024	025
T16	Confidentiality information protocol	026	027	028
T17	Role-conflict declaration	029	030	031
T18	Session working agreement	032	033	034
T19	Data processing map	035	036	037
T20	Referral and escalation protocol	038	039	040
T21	Rematch and termination guide	041	042	043
T22	Team coaching contract	044	045	046

THE AGREE DECISION

Are rights and boundaries clear? Minimum output: Four-way contract.



Open the guide. Use the worksheet.

These are local guide pages. Original tool identifiers are unchanged.

ID	Tool / activity	Guide	Sheet	Example
T23	Digital and AI consent notice	047	048	049
T24	Contract quality audit	050	051	052
T78	Matching, chemistry and rematch protocol	053	054	055
X09	Chemistry conversation from the coachee's chair	056	057	058
X10	Negotiate a shared coaching goal	059	060	061
X11	Confidentiality boundaries rehearsal	062	063	064
X12	Feedback and challenge agreement	065	066	067
X13	Participation, agency and expectations	068	069	070
X14	Session preparation and private learning record	071	072	073

THE AGREE DECISION

Are rights and boundaries clear? Minimum output: Four-way contract.



THE 6A WORKPLACE COACHING SYSTEM

02

Agree

A clear agreement protects useful freedom

THE GATE

Are rights and boundaries clear?

MINIMUM OUTPUT

Four-way contract

19 TOOLS & ACTIVITIES

[Open the stage tool directory >](#)



01 Align

02 Agree

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06 Assure

AGREE / TOOL DIRECTORY

Agree: tools to use

Directory 1 of 2 | T = retained source tool | X = new executive activity

ID	Tool / activity	Guide	Form	Example
T13	Four-way contracting canvas	115	116	117
T14	Coachee agreement	120	121	122
T15	Sponsor briefing guide	123	124	125
T16	Confidentiality information protocol	126	127	128
T17	Role-conflict declaration	129	130	131
T18	Session working agreement	132	133	134
T19	Data processing map	135	136	137
T20	Referral and escalation protocol	138	139	140
T21	Rematch and termination guide	141	142	143
T22	Team coaching contract	144	145	146

BEFORE YOU MOVE ON

Are rights and boundaries clear? Complete or revisit: Four-way contract.

BASIS H04 / Original HR Delivery executive activities | Every tool has a guide, form and worked page



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AGREE / TOOL DIRECTORY

Agree: tools to use

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T23	Digital and AI consent notice	147	148	149
T24	Contract quality audit	150	151	152
T78	Matching, chemistry and rematch protocol	153	154	155
X09	Chemistry conversation from the coachee's chair	156	157	158
X10	Negotiate a shared coaching goal	159	160	161
X11	Confidentiality boundaries rehearsal	162	163	164
X12	Feedback and challenge agreement	165	166	167
X13	Participation, agency and expectations	168	169	170
X14	Session preparation and private learning record	171	172	173

BEFORE YOU MOVE ON

Are rights and boundaries clear? Complete or revisit: Four-way contract.

BASIS H04 / Original HR Delivery executive activities | Every tool has a guide, form and worked page

AGREE / THE PRACTITIONER BRIEF

A clear agreement protects useful freedom

Agree creates the psychological and practical conditions for learning. The controlling 6A framework names four parties: coachee, coach, sponsor and programme owner. Their roles may overlap in a small organisation, but the responsibilities do not disappear. The line manager's support must also be explicit, whether or not that person is the sponsor. [H01-H04]

Contract the relationship and the system

Agree purpose, scope, cadence, fees or resources, roles, information, records, technology, review and exit. Explain what coaching is not. Where a manager uses coaching skills, acknowledge the employment power relationship rather than promising the confidentiality of an independent external coach.

Make information flows concrete

State who receives attendance, goals, agreed actions, assessment reports and private notes. Employer funding does not automatically give access to session content. Work through examples of a sponsor request, a platform recording and a serious concern. Verify applicable duties rather than promise absolute secrecy.

Agree how to work together

Discuss questions, silence, feedback, challenge, language and access preferences. The coachee can reject an interpretation. The coach can name competence boundaries and decline unsafe work. Revisit the agreement when an activity becomes unhelpful; initial consent is not permanent permission for every method.

Handle competing purposes honestly

A sponsor may want observable change while the executive wants space to explore. Find a legitimate shared work goal and retain differences. If coaching is being used alongside a formal performance or selection process, disclose the separation and do not allow confidential material to drift into consequential decisions.

Prepare for repair and exit

Describe a no-fault rematch route, complaints process, pause conditions and closure arrangements before they are needed. A missed assignment should prompt a review of relevance and opportunity, not a judgement about coachability. Ending an unsuitable engagement can be an appropriate outcome.

Check understanding, not signatures alone

Ask each party to explain the agreement in their own words. A signed form with contradictory expectations is not a reliable contract. Resolve material differences, record decisions and provide a usable copy. Re-contract after a role change, new sponsor, new assessment purpose or material technology change.



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AGREE / OPERATING ROUTE

Choose the next useful move.

These routes are practical suggestions, not a requirement to complete every tool.

01

Choose the relationship

T17, T78, X09 / Chemistry, matching and access

02

Agree purpose and rights

T13, T14, T15, X10 / Four-way and engagement agreement

03

Protect information

T16, T18, T19, X11 / Flows, consent and records

04

Agree the working style

X12, X13, X14 / Challenge, participation and preparation

05

Plan exceptions

T20, T21, T22, T24 / Referral, rematch, re-contract and audit

GATE REVIEW

Are rights and boundaries clear? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T13

TOOL

Four-way contracting canvas

Align coachee, coach, sponsor and programme owner.

Practical guide

Working form

Worked example

EXCEL TAB T13 Fourway contracting canvas

TIME 45-60 minutes initially, plus 15-30 minutes whenever purpose, role, risk or reporting changes | **OWNER** Coach

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Invite the coachee, coach, sponsor and programme owner to state purpose, expectations and concerns separately; include the line manager's support role explicitly where relevant.
- 02** Agree organisational relevance while preserving the coachee's ownership of goal wording and session agenda.
- 03** Define each party's contribution, authority, non-role and action when a system barrier emerges.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Specify private content, permitted reporting, exceptions, records, technology and exact information flows.
- 05** Agree review, support, rematch, escalation and re-contracting triggers; confirm understanding in each party's words.

BOUNDARY & CAUTION

Do not proceed when sponsorship, goal ownership or confidentiality expectations remain materially incompatible.

BETWEEN SESSIONS / HAND-OFF

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

SOURCE / EDITION NOTE

Edition clarification: the controlling 6A framework names coachee, coach, sponsor and programme owner. H04's T13 instruction names the line manager instead of the programme owner; this edition restores the controlling four parties and records manager support separately.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.87

T13 Four-way contracting canvas

TOOL

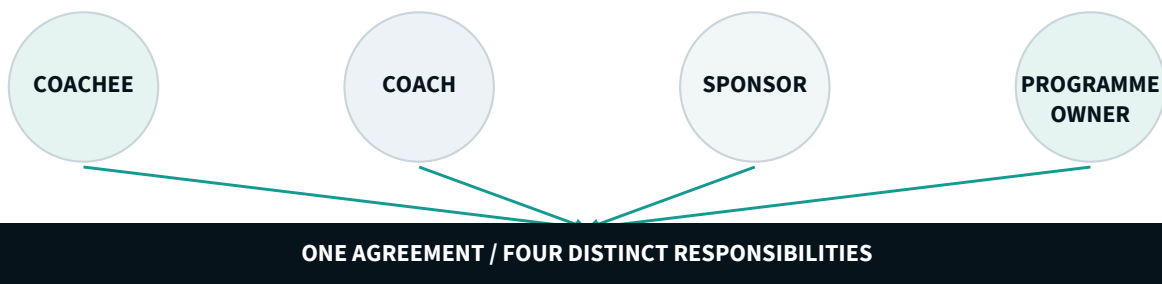
Align coachee, coach, sponsor and programme owner.

Guide

Worksheet

Example

LIVE WORKSHEET



Purpose Shared reason and coachee meaning

Goals Organisational relevance and coachee ownership

Roles Each party's contribution

Confidentiality What is private

Information sharing What is shared, by whom and when

Exceptions Law, safety and agreed escalation

Reviews Midpoint and closure process

Exit Rematch, pause and termination rights

T13 Four-way contracting canvas

TOOL

Align coachee, coach, sponsor and programme owner.

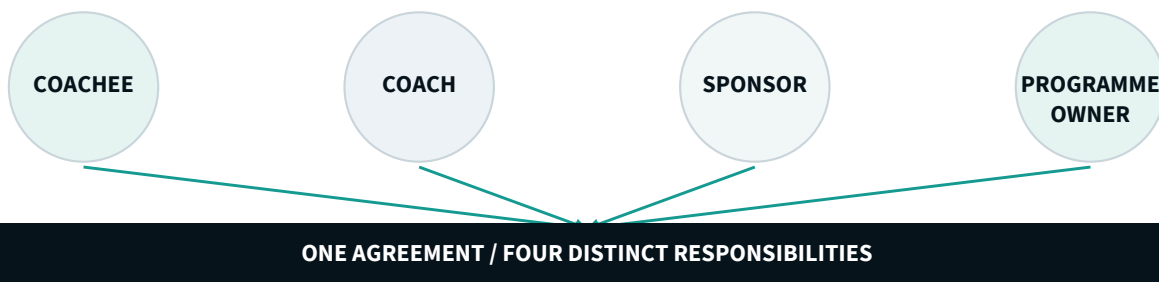
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.



Purpose Shared reason and coachee meaning

Strengthen Director M-07's decision framing and influence at MetroLink East's two upcoming investment gates.

Goals Organisational relevance and coachee ownership

The director owns the behavioural goal; the sponsor confirms relevance without selecting session topics or methods.

Roles Each party's contribution

Coachee experiments, coach facilitates, line manager creates opportunity, sponsor removes authority barriers and programme team assures quality.

Confidentiality What is private

Session dialogue and coach notes stay private except for explained imminent-harm, legal or safeguarding obligations.

Information sharing What is shared, by whom and when

Attendance, coachee-approved goal wording, midpoint support request and closing progress summary follow agreed dates and senders.

Exceptions Law, safety and agreed escalation

Not populated in the original worked extract.

Reviews Midpoint and closure process

Not populated in the original worked extract.

Exit Rematch, pause and termination rights

Not populated in the original worked extract.

A four-way executive coaching agreement

Parties and purpose

Identify the coachee, coach, sponsor and programme owner, plus the line manager's support role where separate. State the development purpose, what is in scope and what is excluded. Record that coaching is not an assessment for selection or a substitute for formal employment procedures unless a distinct, transparent arrangement has been agreed.

Coachee ownership and participation

The coachee owns their session agenda, choices and agreed practice within the engagement purpose. Explain what is voluntary and any separate organisational requirements. Provide a route to question an activity, request an adjustment, pause, rematch or end the engagement without an invented judgement about motivation.

Coach competence and method

Describe the coach's role, relevant competence and limits. Explain that methods are chosen collaboratively and may be adapted. The coach will not provide clinical treatment, legal advice or technical authorisation outside their qualifications and remit. Identify the supervision and referral arrangements.

Sessions, access and practical arrangements

Specify the number or review-based arrangement of sessions, duration, delivery mode, scheduling, cancellations, fees or internal resources and access adjustments. Do not imply that a fixed number of sessions guarantees a result. Clarify what contact is available between sessions and what is not an emergency service.

Sponsor and programme responsibilities

The sponsor provides the agreed organisational support and respects the information boundary. The programme owner manages matching, access, quality, records and concerns within the approved policy. Clarify who acts when a system barrier prevents practice, and who can authorise changes to scope or resources.

Information sharing

List each information type, purpose, recipient and permission or applicable basis: attendance, goals, agreed actions, assessment reports, private notes and aggregate themes. Private session content is not automatically disclosed because the employer pays. Prepare a separate approved progress summary rather than sending the whole workbook.



A four-way executive coaching agreement

Limits to confidentiality

Explain relevant limits in plain language, including applicable duties and serious concerns requiring qualified action. Verify the local requirements and avoid an absolute promise of secrecy. Where disclosure is required, use the minimum necessary information and the appropriate route; explain how the coachee will be involved when appropriate.

Assessments

Use only authorised instruments and reports for a defined purpose, with suitable technical guidance, qualifications and language or population evidence. Explain access, interpretation and retest arrangements. No assessment item bank is reproduced in this toolkit. Do not combine unlike scores into a psychological verdict.

Records, platforms and AI

Specify what records are created, where they are stored, who can access them and the verified retention, return and deletion arrangements. Recording, transcription and AI use are not default permissions. Review processing, security, access and other applicable requirements before introducing a platform or new use.

Workplace practice and safety

Agree realistic opportunities, support and authority for experiments. The coachee remains responsible for role duties and obtains necessary permissions. Experiments must not bypass safety, professional or technical requirements, and affected colleagues should not be covertly assessed.

Review, concerns and changes

Specify review dates, evidence and decisions. Provide named routes for concerns, complaints, referral, rematching and re-contracting. A role change, new sponsor, material technology change or altered assessment purpose triggers a review of the agreement. Serious concerns are not averaged away by positive feedback.

Closure and approval

At closure, agree what has ended, what remains owned elsewhere, future support and the permitted summary. Confirm the record lifecycle. Record each party's understanding, unresolved conditions and approval date. This specimen is a drafting aid; qualified local review is required before use as a binding agreement.

01 Align

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T14

TOOL

Coachee agreement

Create informed, practical consent for the engagement.

Practical guide

Working form

Worked example

EXCEL TAB T14 Coachee agreement

TIME 20-30 minutes before coaching begins; pause and re-agree after any material service change | **OWNER** Coach + coachee

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Explain choice, any implications of declining and available alternatives before seeking agreement.
- 02** Define workplace-development scope, exclusions and the boundary with advice, therapy and formal assessment.
- 03** Agree session number, duration, channel, location, between-session contact and cancellation arrangements.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Explain confidentiality, specific exceptions and what the coach will do if an exception may apply.
- 05** List records, owners, access, retention, technology and complaint or withdrawal routes; record informed acceptance.

BOUNDARY & CAUTION

Do not treat signature as informed agreement when choice, records, exceptions or technology remain unclear.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.90



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T14

TOOL

Coachee agreement

Create informed, practical consent for the engagement.

Practical guide

Working form

Worked example

EXCEL TAB T14 Coachee agreement

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Voluntariness Choice and implications of declining	
Scope Coaching purpose and limits	
Format Sessions, channels, location and contact	
Confidentiality Rules and exceptions	
Records What is kept and by whom	
Technology Platforms, recording, transcription and AI	
Responsibilities Preparation, action and feedback	
Ending Closure, complaints and referrals	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

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Coachee agreement

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Working form

Worked example

EXCEL TAB T14 Coachee agreement

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Voluntariness Choice and implications of declining	Participation is optional; declining triggers no adverse employment consequence and leaves existing support routes available.
Scope Coaching purpose and limits	Six workplace-development sessions address decision framing and stakeholder influence, not therapy, technical advice or formal assessment.
Format Sessions, channels, location and contact	Six confidential sixty-minute video sessions over five months, plus an optional in-person closure at Meridian headquarters.
Confidentiality Rules and exceptions	The coach shares no session content; narrowly defined safety, legal and safeguarding exceptions are explained before consent.
Records What is kept and by whom	The coach keeps brief process notes for three months after closure; Meridian retains only operational and agreed outcome data.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

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T15

TOOL

Sponsor briefing guide

Set expectations and prevent surveillance pressure.

Practical guide

Working form

Worked example

EXCEL TAB T15 Sponsor briefing guide

TIME 45-minute briefing before nomination or goal-setting, with a 15-minute midpoint boundary refresh | **OWNER** Programme owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Explain the strategic purpose, intended population, coaching mechanism, limits and concurrent system actions.
- 02** Define sponsor duties for context, opportunity, workload, barrier removal and response to support requests.
- 03** State exactly what attendance, goal, progress and outcome information sponsors will and will not receive.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Rehearse how sponsors can invite relevant goals without directing private topics or judging participation.
- 05** Explain aggregate-theme thresholds, decision use, participant communication and the route for boundary questions.

BOUNDARY & CAUTION

Do not use sponsor briefing to solicit personal disclosures or coach-generated judgments about a participant.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.93



01 Align

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T15

TOOL

Sponsor briefing guide

Set expectations and prevent surveillance pressure.

Practical guide

Working form

Worked example

EXCEL TAB T15 Sponsor briefing guide

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Purpose Why the offer exists

Sponsor role Context, opportunity and support

Information What sponsor will and will not receive

Goal ownership How organisational relevance and coachee agency coexist

System themes How aggregate learning may be shared

Concern route Who to contact and when

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



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TOOL

Sponsor briefing guide

Set expectations and prevent surveillance pressure.

Practical guide

Working form

Worked example

EXCEL TAB T15 Sponsor briefing guide

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Purpose Why the offer exists	Enable project directors to make clearer capital-gate decisions while a separate initiative corrects cross-functional authority gaps.
Sponsor role Context, opportunity and support	Provide context, protect practice time, respond to agreed support requests and remove documented system barriers.
Information What sponsor will and will not receive	Sponsors receive attendance, approved goal wording and aggregate themes, never coach notes, personal disclosures or session narratives.
Goal ownership How organisational relevance and coachee agency coexist	Invite organisationally relevant goals, then let each director refine wording, evidence and experiments with their coach.
System themes How aggregate learning may be shared	Quarterly reporting suppresses small groups and shares only recurring barriers that meet the programme's aggregation threshold.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

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T16

TOOL

Confidentiality information protocol

Define every information flow before data is created.

Practical guide

Working form

Worked example

EXCEL TAB T16 Confidentiality information

TIME 60-90 minutes to map each item; qualified review before new data, recipient or technology use | **OWNER** Data owner + quality lead

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** List each proposed information item separately, including notes, ratings, attendance, transcripts and derived data.
- 02** Define the necessary purpose and reject items whose purpose can be met with less information.
- 03** Name the source, recipient and precise content; distinguish voluntary sharing from required disclosure.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Confirm lawful and ethical basis, access, secure channel, retention and participant visibility with qualified reviewers.
- 05** Test likely requests and exceptions; document refusal, correction, withdrawal and protocol-review routes.

BOUNDARY & CAUTION

Do not rely on generic consent where the purpose, recipient, content or legal obligation is specific.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.96



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T16

TOOL

Confidentiality information protocol

Define every information flow before data is created.

Practical guide

Working form

Worked example

EXCEL TAB T16 Confidentiality information

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

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

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T16

TOOL

Confidentiality information protocol

Define every information flow before data is created.

Practical guide

Working form

Worked example

EXCEL TAB T16 Confidentiality information

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Information item Attendance, goal, notes, feedback, outcomes, transcript	Coachee-approved one-sentence goal summary, excluding session content, personality labels and unverified stakeholder allegations.
Purpose Why it is needed	Confirm organisational relevance and enable the line manager to offer appropriate work opportunities and support.
Source Who provides it	The coachee drafts the wording with the coach and explicitly approves the final version.
Recipient Who receives it	Named line manager and programme coordinator; the executive sponsor receives only aggregated goal categories.
Lawful/ethical basis Consent, contract or obligation	Documented participant agreement and programme administration purpose, subject to local privacy review and withdrawal process.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T17

TOOL

Role-conflict declaration

Surface dual roles and decide whether they can be managed.

Practical guide

Working form

Worked example

EXCEL TAB T17 Roleconflict declaration

TIME 10-15 minutes at matching and rechecked on change; rapid specialist review for material conflicts | OWNER Coach

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Ask the coach to declare employment, consulting, assessment, commercial and professional roles relevant to the engagement.
- 02** Map prior and current relationships with coachee, sponsor, provider, suppliers and connected decision-makers.
- 03** Identify non-public information already held and whether it can influence questions or be inadvertently disclosed.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Assess employment, assessment, procurement, referral and reputational power rather than financial interest alone.
- 05** Decide disclose and manage, offer choice, restrict scope or decline; record controls and recheck triggers.

BOUNDARY & CAUTION

Do not assume disclosure removes a conflict; material power or information risks may still require rematch.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.99



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T17

TOOL

Role-conflict declaration

Surface dual roles and decide whether they can be managed.

Practical guide

Working form

Worked example

EXCEL TAB **T17 Roleconflict declaration**

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Roles Coach's other roles	
Relationships Prior/current relationships	
Information What the coach may already know	
Decision power Employment, assessment or commercial influence	
Risk Impact on trust or impartiality	
Safeguard Disclosure, separation, supervision or reassignment	
Consent Parties' informed decision	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T17

TOOL

Role-conflict declaration

Surface dual roles and decide whether they can be managed.

Practical guide

Working form

Worked example

EXCEL TAB T17 Roleconflict declaration

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Roles Coach's other roles	Proposed coach previously advised Meridian's joint-venture partner and now provides independent executive coaching.
Relationships Prior/current relationships	The coach worked with the commercial sponsor eighteen months ago but has never met Director M-07.
Information What the coach may already know	Prior consulting exposed the coach to non-public contract history relevant to MetroLink East negotiations.
Decision power Employment, assessment or commercial influence	The coach holds no employment authority, supplier-selection vote or current advisory mandate with either party.
Risk Impact on trust or impartiality	Undisclosed knowledge could shape questions, reduce perceived impartiality and create concern about confidential commercial information.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T18

TOOL

Session working agreement

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

Practical guide

Working form

Worked example

EXCEL TAB T18 Session working agreement

TIME 15-20 minutes in the first session and five minutes to revisit when working needs change | **OWNER** Coach + coachee

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Ask what useful challenge feels like and agree how permission, pause and disagreement will work.
- 02** Negotiate pace, silence, structure and reflection time rather than assuming one conversational rhythm.
- 03** Agree how observations and feedback will distinguish behaviour, inference, impact and coachee interpretation.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

The coach dictates challenge, pace and feedback without coachee negotiation; Treating an access requirement as an optional preference that can be ignored; Leaving between-session contact open-ended and creating hidden availability expectations.

CONTINUE THE METHOD

- 04** Confirm language, format, sensory, technology and communication adjustments without seeking unnecessary explanation.
- 05** Set between-session contact, experiment, response-time and emergency boundaries; revisit usefulness periodically.

BOUNDARY & CAUTION

Do not use the working agreement to override a participant's access need, refusal or right to pause.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.102



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T18

TOOL

Session working agreement

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

Practical guide

Working form

Worked example

EXCEL TAB T18 Session working agreement

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Useful challenge How permission and challenge will work

Pace Reflection, silence and structure

Feedback How observations are offered and tested

Access Language, format and adjustments

Between sessions Contact and experiments

Rupture How either party will name what is not working

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T18

TOOL

Session working agreement

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

Practical guide

Working form

Worked example

EXCEL TAB T18 Session working agreement

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Useful challenge How permission and challenge will work	The coach may test contradictions after asking permission; the director can pause, reject or reframe any challenge.
Pace Reflection, silence and structure	Allow quiet reflection before options, then reserve the final ten minutes for a specific workplace experiment.
Feedback How observations are offered and tested	Offer behaviour-based observations as hypotheses, check accuracy and distinguish direct evidence from interpretation.
Access Language, format and adjustments	Use plain English, share questions in chat when useful and send no unrequested session summaries afterward.
Between sessions Contact and experiments	Contact is limited to scheduling and one agreed experiment check-in through the approved portal.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T19

TOOL

Data processing map

Control personal and sensitive coaching data end to end.

Practical guide

Working form

Worked example

EXCEL TAB T19 Data processing map

TIME Half-day lifecycle mapping; technical and privacy review before launch, integration or material platform change |
OWNER Privacy/data owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Inventory every data element from discovery through matching, sessions, evaluation, supervision, closure and deletion.
- 02** Trace where each element is entered, stored, copied, exported or cached, including informal channels.
- 03** Assign role-based access and test whether technical permissions match the documented need.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Map processors, subprocessors, integrations, countries and transfer mechanisms with security and privacy reviewers.
- 05** Set item-specific retention, deletion evidence, incident response and review triggers; remove unjustified collection.

BOUNDARY & CAUTION

Do not treat this map as a substitute for qualified privacy, security and records-management assessment.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.105



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T19

TOOL

Data processing map

Control personal and sensitive coaching data end to end.

Practical guide

Working form

Worked example

EXCEL TAB T19 Data processing map

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

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

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T19

TOOL

Data processing map

Control personal and sensitive coaching data end to end.

Practical guide

Working form

Worked example

EXCEL TAB T19 Data processing map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Data element Minimum necessary item	Participant identifier, matching preferences, session dates, approved goal summary and agreed progress ratings only.
System Where captured or stored	Encrypted Meridian coaching portal with session transcription, generative summaries and free-text diary functions disabled.
Access Role-based permissions	Operations sees matching and attendance; evaluator receives pseudonymised measures; coaches access only their assigned engagements.
Transfer Countries/processors/channels	Hosting remains in the approved UK region; no subprocessor or cross-border transfer is permitted without review.
Retention Period and rationale	Operational records delete twelve months after closure; coach process notes delete after three months unless law requires otherwise.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T20

TOOL

Referral and escalation protocol

Guide proportionate response when needs exceed coaching boundaries.

Practical guide

Working form

Worked example

EXCEL TAB T20 Referral and escalation pro

TIME Two-hour design and tabletop test; immediate qualified consultation when a live trigger occurs | **OWNER** Quality lead

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Define observable triggers across distress, imminent safety, safeguarding, legal, grievance and capability categories.
- 02** Specify the coach's immediate within-competence response, including pause, explanation and urgent safety action.
- 03** Name rapid consultation routes, response times, deputies and the information each specialist requires.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Map qualified referral or formal routes, participant choice and continuity where coaching may safely continue.
- 05** Set minimum disclosure, documentation, follow-up and incident-review rules; test them through realistic scenarios.

BOUNDARY & CAUTION

Do not improvise urgent clinical, safeguarding or legal action from this template; follow qualified local protocol.

BETWEEN SESSIONS / HAND-OFF

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

SOURCE / EDITION NOTE

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.108



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T20

TOOL

Referral and escalation protocol

Guide proportionate response when needs exceed coaching boundaries.

Practical guide

Working form

Worked example

EXCEL TAB T20 Referral and escalation pro

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

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

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T20

TOOL

Referral and escalation protocol

Guide proportionate response when needs exceed coaching boundaries.

Practical guide

Working form

Worked example

EXCEL TAB T20 Referral and escalation pro

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Trigger Distress, safety, legal, grievance, capability or other	Director reports persistent sleeplessness, panic before site visits and thoughts suggesting possible immediate personal safety risk.
Coach response Immediate action within competence	Pause coaching, assess immediate urgency within competence, explain limits and support contact with qualified assistance.
Consultation Supervisor/quality /legal/safeguarding	Use the named rapid-consultation supervisor and Meridian safeguarding lead without circulating session details more widely.
Referral Qualified service or formal route	Offer occupational health, employee assistance and emergency services according to urgency; coaching does not replace clinical care.
Disclosure Minimum information and basis	Share only information necessary to protect safety, explain the basis where possible and document the decision securely.

WHAT THE COACH SHOULD NOTICE

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TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T21

TOOL

Rematch and termination guide

Enable dignified exit without requiring personal disclosure.

Practical guide

Working form

Worked example

EXCEL TAB T21 Rematch and termination gui

TIME 15-30 minutes for routine rematch; immediate review for safety, boundary or conduct concerns | OWNER Programme owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Record the reason category without requiring private content or forcing the participant to justify fit.
- 02** Assess whether to pause, protect, continue briefly or activate an urgent conduct or safeguarding route.
- 03** Identify the minimum operational information needed and restrict access to those arranging the response.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Offer recontract, rematch, referral or closure with genuine participant choice and stated service levels.
- 05** Resolve fees, unused sessions, records, communications and follow-up; analyse aggregate patterns without identifying people.

BOUNDARY & CAUTION

Do not require explanation or continued contact when a participant requests a routine confidential rematch.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.111



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T21

TOOL

Rematch and termination guide

Enable dignified exit without requiring personal disclosure.

Practical guide

Working form

Worked example

EXCEL TAB T21 Rematch and termination gui

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Reason category Fit, logistics, boundary, conflict, conduct or no longer needed	
Immediate need Pause, protect or continue temporarily	
Information Minimum needed to act	
Options Recontract, rematch, refer or close	
Commercial effect Fees and cancellation	
Learning Aggregate quality insight	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T21

TOOL

Rematch and termination guide

Enable dignified exit without requiring personal disclosure.

Practical guide

Working form

Worked example

EXCEL TAB T21 Rematch and termination gui

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Reason category Fit, logistics, boundary, conflict, conduct or no longer needed	Fit concern: after two sessions, the director experiences the coach's industry background as constraining honest exploration.
Immediate need Pause, protect or continue temporarily	Pause future sessions while preserving confidentiality; no safety, conduct or urgent support concern is present.
Information Minimum needed to act	Operations records only participant-requested rematch, scheduling constraints and preferred alternative profile, not the private rationale.
Options Recontract, rematch, refer or close	Offer two suitable coaches within five working days, or close the engagement without requiring justification.
Commercial effect Fees and cancellation	Unused sessions transfer to the replacement coach; the chemistry session carries no participant or project charge.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T22

TOOL

Team coaching contract

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

Practical guide

Working form

Worked example

EXCEL TAB T22 Team coaching contract

TIME 60-90 minutes before substantive work, with re-contracting after membership, purpose or sponsor changes | **OWNER** Team coach

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Define the intact team's real interdependent task, required outcomes and reason team coaching may help.
- 02** Confirm membership, authority, absences, changing participants and whose work is affected by the team.
- 03** Differentiate team coaching from facilitation, consulting, training, mediation and individual performance action.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Agree within-team and sponsor information boundaries, recognising confidentiality limits in collective work.
- 05** Set voice, participation, experiment, conflict, decision and review norms; obtain meaningful agreement from all members.

BOUNDARY & CAUTION

Do not use team coaching for a nominal group lacking a shared task, interdependence or safe participation conditions.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.114



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T22

TOOL

Team coaching contract

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

Practical guide

Working form

Worked example

EXCEL TAB T22 Team coaching contract

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Team purpose Real task and outcomes	
Membership Who is in the team and why	
Boundaries Team coaching vs facilitation/consulting	
Confidentiality Inside-team and sponsor information	
Participation Voice, absence and voluntariness	
Live work Meetings/decisions to observe	
Evaluation Collective behaviour and task evidence	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T22

TOOL

Team coaching contract

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

Practical guide

Working form

Worked example

EXCEL TAB T22 Team coaching contract

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Team purpose Real task and outcomes	Help the MetroLink East gate team resolve live scope and contingency decisions with clearer shared accountability.
Membership Who is in the team and why	Project, commercial, engineering, operations and community leads who jointly produce and execute capital-gate recommendations.
Boundaries Team coaching vs facilitation/consulting	The coach works on team interaction and decision process; specialists retain technical, contractual and assurance authority.
Confidentiality Inside-team and sponsor information	Team-session content remains inside the room; the sponsor receives agreed decisions, support requests and aggregated process learning.
Participation Voice, absence and voluntariness	Core members commit to four sessions; anyone may decline a personal disclosure without losing decision voice.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T23

TOOL

Digital and AI consent notice

Secure informed use of AI-enabled or recorded coaching.

Practical guide

Working form

Worked example

EXCEL TAB T23 Digital and AI consent noti

TIME 45-60 minutes to draft; privacy, security and legal review before launch and after any material product or data-use change. | OWNER Product owner

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Name the tool/provider and state exactly whether AI generates, summarises, recommends, matches or analyses.
- 02** Map every input, output and log, including storage, access, retention and any model-training use.
- 03** Define where human review intervenes and which decisions the system must never make alone.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

CONTINUE THE METHOD

- 04** Explain accuracy and safety limits, opt-out, correction, deletion and export in plain language.
- 05** Record affirmative choice and publish the named human-support and incident-escalation route.

BOUNDARY & CAUTION

Do not treat a notice or click-through as informed consent when AI purpose, data use, human oversight or a viable non-AI route is unclear.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.117



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T23

TOOL

Digital and AI consent notice

Secure informed use of AI-enabled or recorded coaching.

Practical guide

Working form

Worked example

EXCEL TAB T23 Digital and AI consent noti

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Tool Provider and function	
AI role Generate, summarise, recommend, match or analyse	
Data Inputs, outputs, logs and model training	
Human review When and by whom	
Limits Accuracy, safety and not-for-use cases	
Choice Opt out, correct, delete, export	
Escalation Human support and incident route	

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T23

TOOL

Digital and AI consent notice

Secure informed use of AI-enabled or recorded coaching.

Practical guide

Working form

Worked example

EXCEL TAB T23 Digital and AI consent noti

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Tool Provider and function	Gate Reflect sandbox, supplied by the pilot vendor for fictional capital-decision rehearsal outside live coaching sessions.
AI role Generate, summarise, recommend, match or analyse	Generate alternative stakeholder questions and summarise only the scenario text deliberately entered by the participant.
Data Inputs, outputs, logs and model training	Use invented project details; prompts and outputs are logged for thirty days and excluded from model training.
Human review When and by whom	The participant judges every suggestion; a qualified practice lead reviews safety samples and reported failures.
Limits Accuracy, safety and not-for-use cases	Never enter live project, personal or contractual data; do not use outputs for safety, legal or investment decisions.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T24

TOOL

Contract quality audit

Check that live agreements meet minimum standards.

Practical guide

Working form

Worked example

EXCEL TAB T24 Contract quality audit

TIME 60-90 minutes per quarterly sample, plus action-owner follow-up within the severity-based deadline. | **OWNER** Quality lead

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Select a risk-based sample and strip out coaching content not needed for the audit.
- 02** Check that purpose, parties, roles and expected decisions are explicit in each agreement.
- 03** Test confidentiality wording against actual exceptions, technologies, records and data access.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Checking whether clauses exist without testing whether parties understand them; Selecting only convenient contracts instead of a risk-based representative sample; Extracting private session content to prove the engagement had a purpose.

CONTINUE THE METHOD

- 04** Verify referral, safeguarding, complaints and role-conflict routes against current practice.
- 05** Classify each finding, assign corrective action and owner, and verify closure by severity.

BOUNDARY & CAUTION

Do not infer coaching quality from paperwork conformity alone or audit confidential session content that is unnecessary to the stated quality purpose.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.120



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T24

TOOL

Contract quality audit

Check that live agreements meet minimum standards.

Practical guide

Working form

Worked example

EXCEL TAB T24 Contract quality audit

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Audit criterion	0 absent	1 partial	2 complete	Evidence / finding	Severity / action
Purpose and parties					
Voluntariness and rights					
Goal relevance / ownership					
Confidentiality and sharing					
Exceptions / referral					
Records / technology / AI					
Access / adjustments					
Review / rematch / complaint / exit					

BASIS H01 / H04 | Reusable working record; duplicate only for the authorised purpose



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T24

TOOL

Contract quality audit

Check that live agreements meet minimum standards.

Practical guide

Working form

Worked example

EXCEL TAB T24 Contract quality audit

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Sample Engagement identifier without unnecessary content	Pseudonymised engagement MIG-CG-07, selected in the first monthly risk-based contract audit.
Purpose Clear and appropriate	The contract names decision framing and influence development, excluding technical assurance and performance assessment.
Parties Roles understood	Director, coach, line manager, executive sponsor and programme owner can each explain their distinct responsibilities.
Confidentiality Specific and current	Private content, agreed reporting, exceptions, rematch and re-contracting triggers are explicit and currently understood.
Data Records and technology covered	The agreement covers portal records, disabled transcription, access roles, UK hosting and verified deletion dates.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T78

TOOL

Matching, chemistry and rematch protocol

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

Practical guide

Working form

Worked example

EXCEL TAB T78 Matching chemistry and rema

TIME 20-minute intake, 30-minute chemistry check; rematch within SLA | **OWNER** Programme operations

BRING Approved use case and pathway | Local policy, legal/privacy/safeguarding routes | Roles, systems, provider and technology facts

RUN THE ACTIVITY

- 01** Collect only coaching need, complexity, preferences, access and availability required.
- 02** Screen prior relationships, information, commercial interests and decision influence.
- 03** Create a shortlist of authorised coaches who satisfy scope and access needs.

CONTINUE THE METHOD

- 04** Use chemistry to test trust, challenge, method and practical fit.
- 05** Record acceptance or no-fault rematch without requiring personal explanation.
- 06** Review protected match and rematch patterns to improve service design.

QUESTIONS TO OPEN THINKING

Which part of this record needs better evidence before a decision?

What remains uncertain, and whose decision or permission is needed?

What will this completed record change in practice?

COMMON ERRORS TO AVOID

Collecting personality or identity data not needed for a safe match; Allowing the chemistry conversation to become an uncontracted coaching session; Requiring the participant to justify a no-fault rematch request.

BOUNDARY & CAUTION

Do not infer fit from protected characteristics, personality profiling or opaque automated matching.

BETWEEN SESSIONS / HAND-OFF

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

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 | H04 source p.123

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T78

TOOL

Matching, chemistry and rematch protocol

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

Practical guide

Working form

Worked example

EXCEL TAB T78 Matching chemistry and rema

Write only what is useful. Keep private reflections private; share only agreed outputs. Continue on a separate approved record when needed.

Matching element	Minimum record / decision
Need and complexity - minimum data	
Access and preference	
Conflict and prior-information screen	
Shortlist and rationale	
Chemistry check: trust, challenge, method and practical fit	
Accept / alternative / rematch and SLA	
Data retained / deleted	

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T78

TOOL

Matching, chemistry and rematch protocol

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

Practical guide

Working form

Worked example

EXCEL TAB T78 Matching chemistry and rema

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Need/complexity Purpose, scope and risk without excess personal data	Project director needs decision-influence coaching; moderate sponsor complexity, no specialist clinical need.
Preferences/access Language, format, identity or adjustment requested	Direct challenge, infrastructure experience, captions, keyboard-accessible materials and morning sessions.
Conflict screen Prior relationships, influence or information	Coach previously advised another portfolio but holds no relationship, information or decision influence here.
Shortlist Suitable coach options and rationale	Two authorised practitioner-level coaches meet scope, access, availability and conflict requirements.
Chemistry check What both parties assess	Participant chooses Coach B after testing challenge style, trust and working accessibility.

WHAT THE COACH SHOULD NOTICE

These entries are a worked extract from the source, not a complete live record. Complete the remaining fields with local evidence and decisions. Source names, dates, financial factors, retention periods and service timings are illustrative, not prescribed defaults.

TRANSFER / NEXT DECISION

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X09

ACTIVITY

Chemistry conversation from the coachee's chair

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

Practical guide

Working form

Worked example

EXCEL TAB X09 Chemistry conversation from

TIME 30 minutes; 10 minutes private reflection

BRING Coach profile and actual scope of competence | Information on alternatives and rematching | Two questions the coachee wants to explore

RUN THE ACTIVITY

- 01** Invite the coachee to explain what they need and what would make the relationship unhelpful. Do not treat the meeting as a sales pitch or collect unnecessary personal history.
- 02** Explain how coaching is conducted, where the coach's expertise ends, and how supervision, confidentiality and concerns are handled. Be clear about any assessment or sponsor role.
- 03** Ask the coachee to interview the coach using their own questions. Include a difficult example: a sponsor requests session content, or the coachee wants advice.

QUESTIONS TO OPEN THINKING

What should I know about how you prefer to think?

How would you want me to respond when we disagree?

What do you need to ask me before choosing?

CONTINUE THE METHOD

- 04** With permission, spend five minutes exploring a modest work question. Stop before the conversation becomes an uncontracted deep intervention.
- 05** Reflect together on the experience: was the person heard, could they disagree, and did the method fit? Do not convert rapport into a compatibility score.
- 06** Give private time and a no-fault option to decline. Record the choice and any conditions, not an assessment of the person's willingness to be coached.

BOUNDARY & CAUTION

Chemistry is not proof of competence. Do not imply that a coachee must accept a match because it has already been paid for.

BETWEEN SESSIONS / HAND-OFF

After the meeting, privately record one reason to proceed, one concern and one condition. Share only what is necessary to establish the match.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X09 Chemistry conversation from the coachee's chair

ACTIVITY

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

Guide

Worksheet

Example

LIVE WORKSHEET

TWO-WAY CHEMISTRY INTERVIEW

01

Ask about the method

02

Test a real conversation

03

Choose freely

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

Use consented, proportionate notes. Do not promise anonymity that the setting cannot support.

01 Development need**02 Questions for the coach****03 Mini-conversation****04 Experience noticed****05 Concerns and conditions****06 Choice**

Basis: H01 / R01 | Original executive application

X09 Chemistry conversation from the coachee's chair

ACTIVITY

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

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

TWO-WAY CHEMISTRY INTERVIEW

01

Ask about the method

What mattered?

02

Test a real conversation

What happened?

03

Choose freely

What else explains it?

WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

Use consented, proportionate notes. Do not promise anonymity that the setting cannot support.

01 Development need

M-07 wants a thinking partner who will challenge assumptions about delegation without prescribing a personality type.

02 Questions for the coach

How do you handle sponsor requests? When do you offer advice? What happens if the match is not useful?

03 Mini-conversation

A five-minute exploration separates delayed evidence from an assumed lack of trust.

04 Experience noticed

M-07 felt able to reject one interpretation and the coach revised it without becoming defensive.

05 Concerns and conditions

Avoid recording sessions; establish the sponsor review wording in advance.

06 Choice

Proceed to contracting after private consideration, with a rematching route through the programme owner.

Basis: H01 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X10

ACTIVITY

Negotiate a shared coaching goal

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

Practical guide

Working form

Worked example

EXCEL TAB X10 Negotiate a shared coaching

TIME 60 minutes; coach prepares separately with each party

BRING Role mandate | Initial coachee and sponsor priorities | Known organisational constraints and review decision

RUN THE ACTIVITY

- 01** Ask each party to describe the desired work difference with a recent example. Keep the sponsor's evaluation responsibilities distinct from the coach's developmental role.
- 02** Place shared interests, different interests and non-negotiable requirements in separate areas. Do not manufacture agreement by replacing a disputed aim with vague language.
- 03** Translate the shared interest into a behaviour the coachee is willing to practise. Distinguish the organisational outcome from the individual's chosen action.

CONTINUE THE METHOD

- 04** Specify support from the sponsor and manager, including time, authority, feedback and opportunities. A goal without these conditions may be unrealistic.
- 05** Agree what evidence and progress information may be shared, by whom and when. Private hypotheses and assessment detail are not automatically sponsor property.
- 06** Read the agreement aloud and invite dissent. Set a review date and a route for re-contracting if the role, purpose or consent changes.

QUESTIONS TO OPEN THINKING

What is shared here, and what is still different?

What will the sponsor do to make practice possible?

What exactly may be said at the review?

BOUNDARY & CAUTION

Do not disguise a formal performance-improvement process as confidential coaching. Disclose any consequential assessment purpose and establish a separate process.

BETWEEN SESSIONS / HAND-OFF

Prepare the wording you are comfortable sharing at a sponsor review; ask the coach to challenge ambiguity before agreeing it.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H02 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X10 Negotiate a shared coaching goal

ACTIVITY

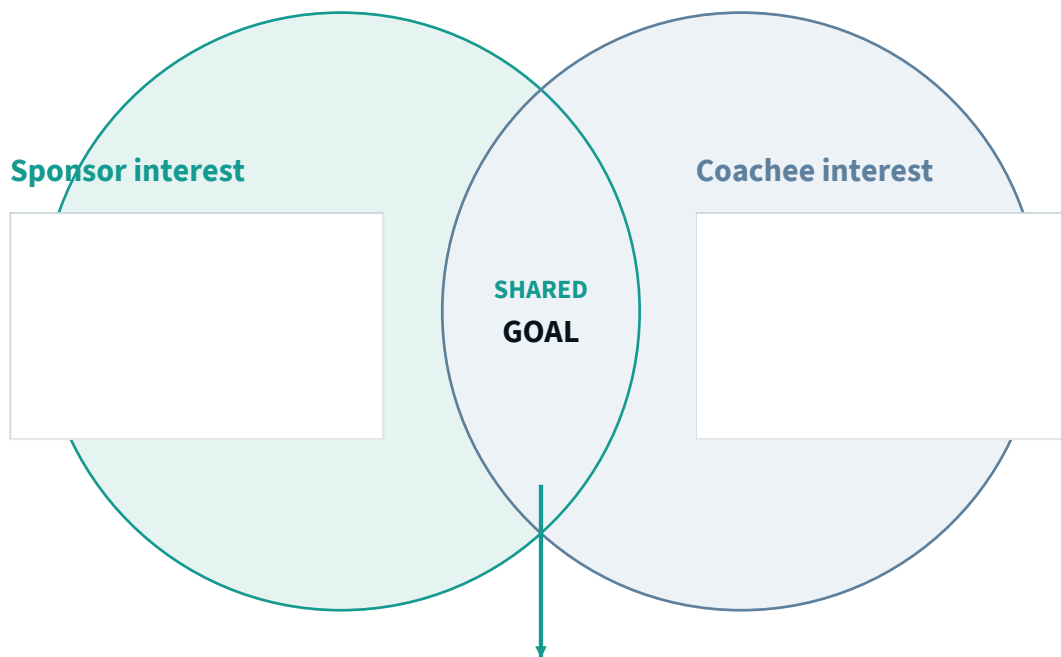
Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.

Guide

Worksheet

Example

LIVE WORKSHEET



03 Shared behavioural goal

04 Support required

05 Information agreement

06 Review

Basis: H01 / H02 / R01 | Original executive application

X10 Negotiate a shared coaching goal

ACTIVITY

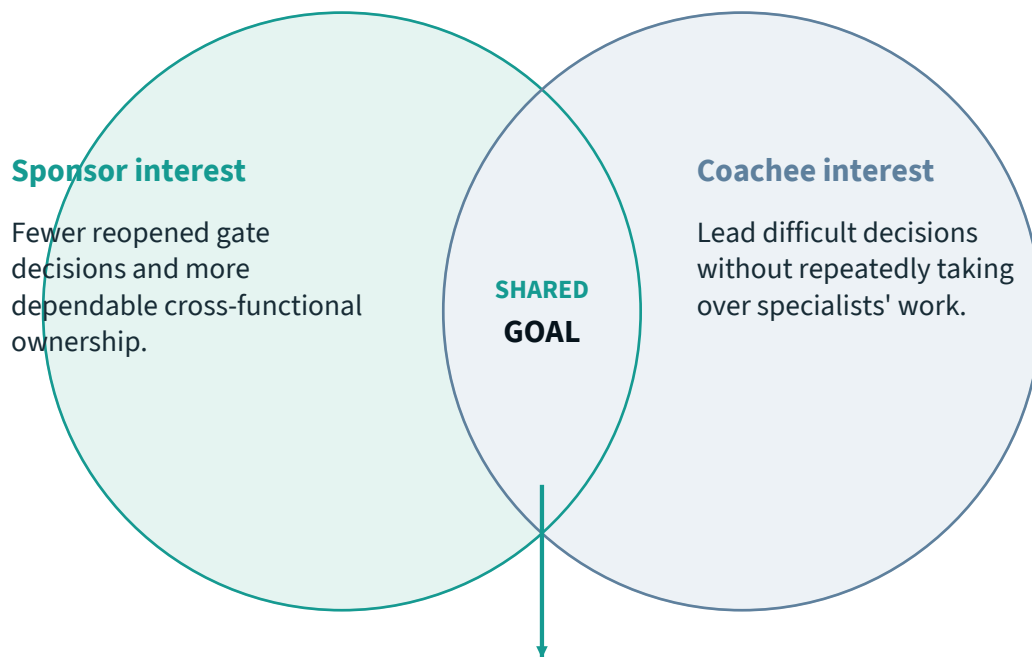
Bring coachee and sponsor priorities into a workable agreement while preserving the coachee's ownership of private learning.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE



03 Shared behavioural goal

At the next two gate reviews, use a clear decision question, invite concerns first and confirm the owner and conditions.

04 Support required

Sponsor clarifies scope authority; engineering lead provides timely evidence and feedback on the trial.

05 Information agreement

M-07 shares agreed actions and observed work evidence; no private notes, raw assessment scores or inferred motives are shared.

06 Review

After two gate meetings, coachee and sponsor discuss usefulness and conditions, then decide whether to retain or revise the goal.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X11

ACTIVITY

Confidentiality boundaries rehearsal

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

Practical guide

Working form

Worked example

EXCEL TAB X11 Confidentiality boundaries

TIME 35 minutes

BRING Draft four-way contract | Information-sharing matrix | Local specialist advice where disclosure duties require it

RUN THE ACTIVITY

- 01** Choose three plausible requests: a sponsor asks what was discussed, a manager wants an assessment report, and a safety concern arises. Use fictional wording, not live sensitive details.
- 02** For each, identify the information owner, intended recipient, purpose, permission and any applicable exception. An absolute promise of secrecy is not appropriate.
- 03** Ask the coachee what they understand the agreement to mean. Compare that understanding with the coach's and programme owner's interpretation.

CONTINUE THE METHOD

- 04** Rehearse a response that acknowledges the request, states the boundary and offers a legitimate alternative such as an agreed progress summary.
- 05** For the safety scenario, practise pausing and seeking appropriate guidance, sharing only what is necessary under the applicable duty. Do not improvise legal advice.
- 06** Update the written information protocol and give each party a plain-language copy. Set a re-contracting trigger for recordings, platforms or role changes.

QUESTIONS TO OPEN THINKING

What could this recipient legitimately need?

What have we actually agreed may be shared?

What would we say without revealing private content?

BOUNDARY & CAUTION

Confidentiality duties depend on context and jurisdiction. Verify applicable obligations; this rehearsal is not legal advice.

BETWEEN SESSIONS / HAND-OFF

Explain the information agreement back in your own words. Flag any recipient or technology not yet covered.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X11

Confidentiality boundaries rehearsal

ACTIVITY

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

Guide

Worksheet

Example

LIVE WORKSHEET

INFORMATION-PERMISSION MAP

1

Keep private

Personal reflections

2

Share by agreement

Specified progress

3

Clarify permission

Report, recipient, purpose

4

Duty or exception

Use the agreed route

Rehearse the actual request and response. Funding does not grant access to session content.

01 Request

02 Boundary

03 Response rehearsal

04 Permitted alternative

05 Exception route

06 Contract update

Basis: H01 / H04 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X11

ACTIVITY

Confidentiality boundaries rehearsal

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

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

INFORMATION-PERMISSION MAP

1

Keep private

Personal reflections

2

Share by agreement

Specified progress

3

Clarify permission

Report, recipient, purpose

4

Duty or exception

Use the agreed route

Rehearse the actual request and response. Funding does not grant access to session content.

01 Request

The sponsor asks the coach whether M-07 has admitted a lack of confidence.

02 Boundary

Private session content and psychological interpretations are outside the sponsor update.

03 Response rehearsal

I cannot share private discussions. M-07 can discuss the agreed goal, practice undertaken and support needed at our scheduled review.

04 Permitted alternative

A coachee-approved summary of the two meeting experiments and the governance issue.

05 Exception route

For a serious safety concern, follow the agreed qualified escalation route and minimum necessary disclosure; do not promise advance consent in every circumstance.

06 Contract update

Add a worked example of sponsor requests and confirm that no recording or transcript will be created by default.

Basis: H01 / H04 / R01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X12

ACTIVITY

Feedback and challenge agreement

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

Practical guide

Working form

Worked example

EXCEL TAB X12 Feedback and challenge agre

TIME 40 minutes

BRING A helpful and an unhelpful feedback experience | The coachee's communication and access preferences | A low-stakes topic for rehearsal

RUN THE ACTIVITY

- 01** Ask what made previous feedback useful or difficult. Focus on observable process, timing and language, avoiding assumptions about culture or personality.
- 02** Distinguish challenge to an idea, an observation about behaviour and an interpretation of meaning. Agree that interpretations are hypotheses the coachee may reject.
- 03** Offer several forms of challenge: a direct observation, a question, a pause, or a rehearsal. Let the coachee identify preferences while preserving the right to revise them.

QUESTIONS TO OPEN THINKING

What helps you examine a difficult idea without feeling cornered?

How will you tell me that my interpretation is wrong?

What should we do when challenge stops being useful?

CONTINUE THE METHOD

- 04** Practise one observation using a modest example. Ask how it landed, what was inaccurate and how the wording could be improved.
- 05** Agree a pause or repair phrase and a route for concerns. The coach remains responsible for ethical limits even when the coachee requests very forceful challenge.
- 06** Record the agreement and check it again after the first substantive session. A preference is not permanent permission.

BOUNDARY & CAUTION

Never interpret consent to challenge as consent to humiliation, coercion, unqualified therapy or personal disclosure.

BETWEEN SESSIONS / HAND-OFF

Notice one moment when challenge helped and one when it did not. Bring the process detail rather than judging the whole relationship.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / R01 / R12 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X12 Feedback and challenge agreement

ACTIVITY

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

Guide

Worksheet

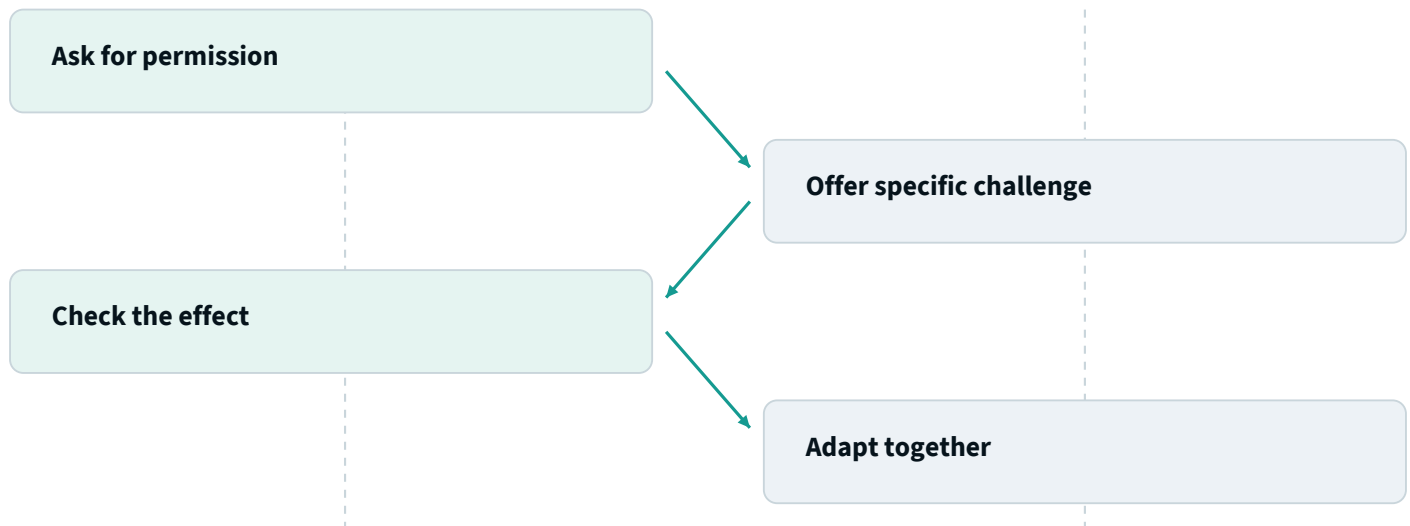
Example

LIVE WORKSHEET

CHALLENGE-AND-PERMISSION REHEARSAL

EXECUTIVE

OTHER PERSON / REHEARSAL PARTNER



Speak the words aloud. Pause, listen, revise and rehearse again; do not script the other person.

01 Helpful conditions

02 Unhelpful conditions

03 Preferred challenge

04 Rehearsal

05 Repair phrase

06 Review point

Basis: H01 / R01 / R12 | Original executive application

X12 Feedback and challenge agreement

ACTIVITY

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

Guide

Worksheet

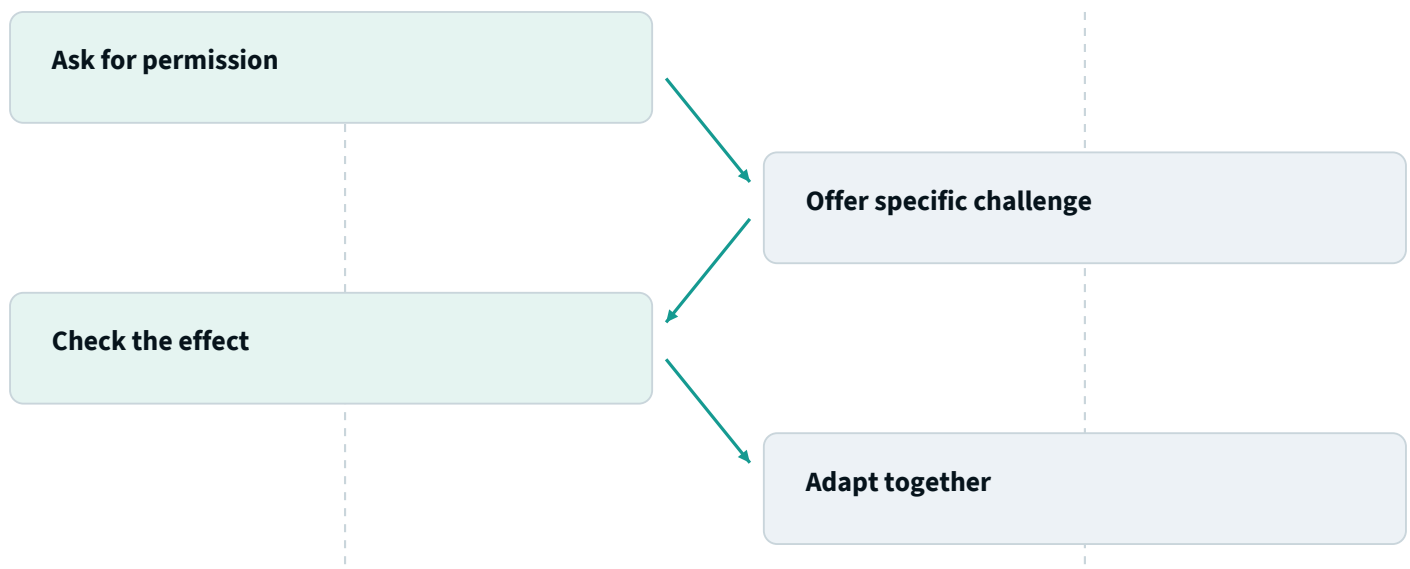
Example

FICTIONAL WORKED EXAMPLE

CHALLENGE-AND-PERMISSION REHEARSAL

EXECUTIVE

OTHER PERSON / REHEARSAL PARTNER



Speak the words aloud. Pause, listen, revise and rehearse again; do not script the other person.

01 Helpful conditions

A specific example, time to think and a question before a conclusion.

03 Preferred challenge

Direct observation followed by an invitation to test its meaning against another episode.

05 Repair phrase

Pause - I am not sure that fits. Both return to observable events and alternative explanations.

02 Unhelpful conditions

Being told that a personality label explains every disagreement.

04 Rehearsal

The coach notes that M-07 supplied the answer immediately after asking a question; M-07 recognises the sequence but disputes its intent.

06 Review point

Check the agreement after session two and whenever the coachee's role or needs change.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X13

ACTIVITY

Participation, agency and expectations

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

Practical guide

Working form

Worked example

EXCEL TAB X13 Participation agency and ex

TIME 35 minutes

BRING Proposed session schedule | Actual workload and access constraints | Programme participation and exit terms

RUN THE ACTIVITY

- 01** Ask what the executive hopes coaching will offer and what they fear it may demand. Acknowledge uncertainty without promising transformation.
- 02** Explore actual time for sessions and between-session practice. Identify workload, travel, language or technology barriers that the programme can change.
- 03** Clarify what the coachee owns: topics, choices and agreed experiments. Explain what the coach owns: competent process, ethical boundaries and appropriate challenge.

QUESTIONS TO OPEN THINKING

What can you realistically commit to in the next fortnight?

What would make an assignment irrelevant or impossible?

How can you change or end this arrangement?

CONTINUE THE METHOD

- 04** Discuss what happens when practice is not completed. Agree to examine relevance and conditions rather than infer laziness or resistance.
- 05** Make the rematch, pause and exit routes concrete, including any programme reporting that follows. Do not describe a compulsory requirement as voluntary.
- 06** Record modest mutual commitments and one early check on whether the arrangement is working.

BOUNDARY & CAUTION

This is not a coachability assessment. Do not score willingness, infer character from missed homework or use participation to decide promotion.

BETWEEN SESSIONS / HAND-OFF

Test the practical commitment for one week and return with any changes needed to make it honest and useful.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H02 / R21 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X13 Participation, agency and expectations

ACTIVITY

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

Guide

Worksheet

Example

LIVE WORKSHEET

PARTICIPATION AND AGENCY CHOICE BOARD



Yes, with clarity



Not yet



No



I need another route

The coachee owns the choice. Record conditions and revisit the agreement when context changes.

01 Coachee expectation

02 Available time

03 Coachee commitment

04 Coach commitment

05 Missed-practice response

06 Pause or exit

Basis: H01 / H02 / R21 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X13 Participation, agency and expectations

ACTIVITY

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

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

PARTICIPATION AND AGENCY CHOICE BOARD



Yes, with clarity



Not yet



No



I need another route

The coachee owns the choice. Record conditions and revisit the agreement when context changes.

01 Coachee expectation

A practical space to think through real decisions, not a weekly judgement of motivation.

02 Available time

Six scheduled sessions and one 20-minute practice slot most weeks, with travel exceptions.

03 Coachee commitment

Bring one real episode and choose a feasible experiment; say when a task does not fit.

04 Coach commitment

Explain methods, check relevance and distinguish systemic barriers from personal patterns.

05 Missed-practice response

Review opportunity, permission and value before changing the assignment; no automatic negative label.

06 Pause or exit

Use the programme owner's no-fault route; share attendance or closure status only as contracted.

Basis: H01 / H02 / R21 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X14

ACTIVITY

Session preparation and private learning record

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

Practical guide

Working form

Worked example

EXCEL TAB X14 Session preparation and pri

TIME 15 minutes before; 10 minutes after each session

BRING A previous action or experiment | One current work episode | A private, approved storage location

RUN THE ACTIVITY

- 01** Before the session, ask the coachee to record the episode, the question and why it matters now. A brief note is enough; do not require a polished report.
- 02** Invite them to distinguish facts, interpretations and feelings they choose to discuss. Do not collect names or sensitive third-party details without need.
- 03** At the opening, ask what would make the time worthwhile and what has changed since preparation. The prepared topic may legitimately be replaced.

CONTINUE THE METHOD

- 04** Near the end, ask the coachee to summarise their insight in their own words. Check that it is theirs rather than a phrase they are repeating to please the coach.
- 05** Record the chosen action, boundary, support and review evidence. Include no action as a legitimate choice when reflection or a management clarification is the better next step.
- 06** Agree what will be retained, where and for how long. Prepare a separate, approved sponsor summary rather than sharing the private record.

QUESTIONS TO OPEN THINKING

What is the question beneath the topic?

What have you decided rather than merely discussed?

What should remain private?

BOUNDARY & CAUTION

One engagement per workbook copy. Hiding a tab is not access control; never send the whole working file to a sponsor.

BETWEEN SESSIONS / HAND-OFF

Use this record before and after the next session, keeping it short enough to sustain.

FINISH WITH An owned choice, a clear boundary and a next source of evidence.

BASIS H01 / H04 / R01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X14 Session preparation and private learning record

ACTIVITY

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

Guide

Worksheet

Example

LIVE WORKSHEET

BEFORE

01 Episode and question

02 Facts versus interpretation

03 Useful session outcome

AFTER / LEARNING

04 Learning in my words

05 Chosen next step

06 Private and shareable records

Basis: H01 / H04 / R01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X14 Session preparation and private learning record

ACTIVITY

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

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

BEFORE

01 Episode and question

M-07 rewrote a recommendation after late evidence. When is intervention necessary and when is it taking back ownership?

02 Facts versus interpretation

The evidence arrived one day late; the assumption was that the specialist had not thought ahead.

03 Useful session outcome

Identify an earlier checkpoint and a way to ask about the delay before intervening.

AFTER / LEARNING

04 Learning in my words

I can make the evidence deadline explicit without owning every draft.

05 Chosen next step

Agree a checkpoint with the specialist, then review one live recommendation after two weeks.

06 Private and shareable records

Keep personal assumptions in the private learning record; share only the agreed checkpoint and support request.



COMPLETE SESSION DESIGNS

From individual tools to a session.

The full run sheets and annotated dialogues follow. Use them as adaptable plans, not mandatory scripts.

S01

First executive coaching session

90 minutes

Run sheet 075 / Annotated dialogue 076

Prepare from the linked tools

Begin with the session purpose, the agreed boundaries and the relevant activity guides. The source run sheet identifies the suggested tool route. Check whether the coachee needs that sequence now, then adapt the pace and emphasis within the agreement.

Use dialogue as a learning example

The annotated conversations are fictional. Read what the coach is doing and why, rather than copying a phrase mechanically. Keep work evidence, interpretation, agency and decision authority visible. Select one useful follow-through assignment and agree how it will be reviewed.

THE FULL SESSION LIBRARY

S01 is in Agree; S02 in Assess; S03, S05 and S06 in Activate; S04 in Apply; S07 in Align; S08 in Assure. The Suite page links to all six guides.



First executive coaching session

Establish a useful focus, an honest relationship and a small next step without rushing into assessment.

Time	Focus	Coach action
0-10	Welcome and immediate purpose	Ask what the executive needs from today and what they understand coaching to be.
10-25	Role and context	Explore a real leadership decision, the mandate and what the sponsor expects.
25-45	Agreement and information	Confirm the four parties, role boundaries, private content, permitted updates and concerns route.
45-60	Fit and goal	Separate coachable behaviour from system or authority issues and choose a provisional goal.
60-80	Explore one episode	Use facts, interpretations and context to identify a useful question rather than a diagnosis.
80-90	Close and prepare	Summarise the coachee's choice, support needed, next evidence and what will be retained.

BETWEEN-SESSION ASSIGNMENT

Complete X01 role mandate and X14 session preparation. Ask the sponsor one agreed authority question. Do not administer an assessment until the developmental question and permissions are clear.

PREPARATION & LIMIT

Tool route: X01, X08-X14; T13-T20, T25. This is an adaptable session design, not a qualification or a mandatory interview. Pause for significant concerns and use appropriate professional routes.



First executive coaching session

Establish a useful focus, an honest relationship and a small next step without rushing into assessment.

Speaker / coaching purpose	Illustrative dialogue
Coach / Starts with the coachee's purpose.	What would make this conversation useful, apart from completing the programme's paperwork?
M-07 / A legitimate tension, not evidence of resistance.	I want to stop rewriting everyone's recommendations, but the sponsor still expects me to own the decision.
Coach / Tests role authority before a personal explanation.	Which decisions are yours, and which approvals stay with the specialists?
M-07 / Reveals a system clarification.	That is not fully clear when scope changes late.
Coach / Separates coaching and management action.	We can explore your response under pressure. Who needs to clarify the scope boundary?
M-07 / Keeps the executive's agency.	The sponsor. I can ask at our next check-in.
Coach / Makes confidentiality operational.	At a review, what are you comfortable sharing about our work?
M-07 / Requires the agreement of all relevant parties.	The goal and the experiment, but not my private reflections or assessment detail.
Coach / Checks understanding rather than relying on a signature.	Let us record that and test it against a realistic sponsor request.

DEBRIEF AND NEXT DECISION

At session two, ask what the sponsor clarified, whether the agreement still fits, and which episode the coachee wants to explore. Unresolved authority is not a failure of motivation.

SHARED FOUNDATIONS AND REFERENCES

Keep the surrounding practice intact.

These source pages accompany every guide so that the activity work is not separated from its context and limits.

Original introduction and use guidance

The following pages retain the master introduction and its instructions on selecting tools, preserving source distinctions and applying professional judgement. They describe the complete toolkit; this standalone guide contains the relevant stage plus the shared material.

Information and practice boundaries

Retained pages cover the companion workbook, private records, the fictional teaching case, other forms of help, and when to pause, refer or re-contract. Read them alongside the active relationship agreement rather than assuming a worksheet establishes permission.

Source continuity

The ebook crosswalk identifies where the source handbook contributes to the toolkit. The references retain the original source codes and study descriptions. They are copied from the master, not presented as newly researched or independently revalidated for this split edition.

Language and edition notes

The working glossary and original responsible-use page remain available in each volume. The original master page numbers, tool identifiers and source descriptions are retained. New guide pagination and the suite page map make the content usable in the smaller volumes.

SOURCE PAGES IN THIS SECTION

Master p.4; pp.20-26; pp.591-606. Source p.2 (the model) and p.3 (operating levels) are already at the front of this guide.



INTRODUCTION

Executive coaching that travels into work

A toolkit for real executive work

This manual is for professional coaches, internal coaching leads and executives who want development to become useful action. It combines HR Delivery's published 6A system, the supplied Coaching and Mentoring at Work ebook and the original 88-tool coaching suite with 72 new executive activities. The source tools retain T01-T88; the new activities use X01-X72. The IDs do not replace the ebook's separate resource IDs. [H01-H04]

Start with a question, not a battery

An executive may need to clarify a mandate, make a difficult decision, delegate without taking work back, hear feedback or navigate a transition. Begin with that question and the conditions around it. Use one activity because it helps, not because it is next in the book. Coaching is not a substitute for management action, instruction, formal employment procedures or qualified health support.

Two connected kinds of tool

The T library provides the organisational and professional infrastructure as well as conversation and transfer tools. The X library provides detailed coach-coachee activities, private reflection, rehearsal and between-session work. Together they connect a trustworthy service with the actual experience of learning. Each A has its own directory and a route through the most relevant tools.

From guide to work

Read the practical guide, prepare the required evidence, agree the activity and use the working form. The worked pages show source examples or clearly labelled new fictional applications. They are not client findings or benchmarks. After an activity, identify what the coachee learned, what they chose and what the next real work opportunity will test.

Use professional judgement

This toolkit is educational and practical. It does not confer accreditation, technical authority or test-user qualification. Original reflective questions are not validated psychometric instruments. Third-party models retain their attribution; separately licensed products and protected assessment item banks are not reproduced. Source limitations and editorial choices are made visible.

Choose. Prepare. Coach. Apply.

1 / Choose the smallest useful tool

Use the front index, each A directory or the assessment-to-activity routes. Agree why an activity fits today's question. The six A stages are an operating system with feedback loops, not a rule that every session must visit all six.

2 / Prepare and contract

Read the purpose, timing, inputs and limits. Ask permission for the activity, explain what will be recorded and clarify who may see it. A person may decline a method, retain private reflections or choose a plain-language alternative.

3 / Guide without taking over

Use the numbered method and suggested questions as prompts. Do not read them mechanically or force a preferred conclusion. Ask the coachee to complete their own record wherever possible and distinguish observation from interpretation.

4 / Use a form suited to the work

Canvases hold a bounded question; registers hold repeated entries; rubrics require their anchors; calculators require valid inputs. The manual and workbook name the same tool IDs and tabs. Blank workbook inputs are deliberate, not missing examples.

5 / Debrief and transfer

Ask what was useful, what did not fit and what the coachee chooses next. An activity should normally lead to a work experiment, a better question or an appropriate organisational action. No action is also legitimate when evidence or authority is missing.

6 / Review and close

Keep the original prediction or goal anchor. Review action, result and explanation separately. Decide what to retain, adapt or stop. Record permitted summaries separately from private learning. One completed page is not evidence of a lasting change.

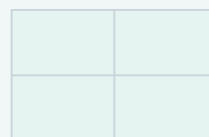
CHOOSE THE VISUAL WORKING SURFACE



WHEEL



LIFELINE



PLOTTER



CHARTS

On paper, write and plot directly. In a PDF reader, use the labelled text fields for notes and the pen or drawing tool for graphical marks. These PDF diagrams do not recalculate automatically.

For live charts, open 12 Visual Index in the Excel workbook. V01-V07 connect the wheel, lifeline, priority plot, time review, decision matrix, feedback counts and goal anchors to their manual activities.



Source continuity and transparent adaptations

What is preserved

The six A names, operating levels, enablers, quality lens and T01-T88 IDs come from HR Delivery's coaching framework and source toolkit. The ebook's coaching and mentoring distinction, examples and assessment cautions are retained. MENTOR, BRIDGE and RELATE remain mentoring architectures; they are not renamed as executive coaching stages. [H01-H04]

What is new

X01-X72, the assessment-to-activity recommendations, session designs and new executive episodes are original educational applications for this edition. Research sources inform selected methods; that does not establish validation of these worksheets or the combined toolkit. Timings are planning estimates, not an optimal dose supported by a universal formula.

Four-way contracting clarification

H02 and the ebook identify coachee, coach, sponsor and programme owner. H04 T13's opening instruction instead names the line manager. This edition uses the controlling four parties and records line-manager support explicitly, including when roles are combined. The discrepancy is disclosed rather than silently merged.

Experience pulse clarification

T62 retains the source's eight actual statements. Stable IDs and single-choice response fields are added. Its five-label source example is replaced by an original eight-item fictional example. The result is descriptive experience feedback, not an alliance diagnosis or composite psychometric scale.

Maturity convention selected

T74 uses H04 Appendix M: Ad hoc, Defined, Integrated and Adaptive. H03 uses Ad hoc, Managed, Integrated and Strategic, with a different 80% progression rule. Those conventions are not combined. This edition records each of the sixteen dimensions against the Appendix M anchors and makes no overall maturity score.

Source cases remain separate

Meridian Infrastructure Group is the fictional case in H04. New X examples extend the M-07 executive situation and are labelled accordingly. Madar Facilities and Harbour Skills Partnership are the ebook's separate fictional cases. Their evidence is not merged or presented as actual client work.

Use evidence without overstating it

Research informs; it does not guarantee

Research syntheses support examining coaching as a potentially useful developmental intervention, with results dependent on design, measures and context. They do not establish that every exercise in a toolkit works, that more sessions are always better or that one conversation model is universally superior. [R06-R08]

Mechanism and application are different claims

Goal setting, implementation intentions, self-determination and self-distancing offer ideas for practice. An executive worksheet adapting those ideas is not itself a validated intervention. The source register distinguishes research, professional guidance, creator methods and licensed-resource pointers. [R17-R26]

Use more than one kind of evidence

Combine the coachee's account, work episodes, authorised assessment where useful, stakeholder experience and operational context. Each source has limits. Keep preference, judgement, behaviour and reasoning separate. A catalogue is not a technical manual. [H01, H05, R04-R05]

Protect against a persuasive success story

Retain failed predictions, missing observations and adverse effects. Ask what else changed and whether the practice was actually used. Do not infer coaching impact from attendance or satisfaction alone. A credible contribution statement may be modest and still useful. [H01-H04]

Do not score what the tool cannot support

The new activities do not rank executives or create psychological diagnoses. Locally defined scales need their anchors and context. The workbook intentionally avoids an overall coachee score, a combined assessment verdict and an automatic readiness decision.



One workbook. Clear information boundaries.

One engagement per working copy

The consolidated workbook is a convenience, not an access-control system. Use one engagement per copy. A hidden sheet, password on a worksheet or a colour label does not make private content safe to share. Store records in an approved environment with the required access controls.

Share selected records, not the whole file

The coach may use governance tabs privately and give the coachee selected X activity pages. A sponsor receives only the agreed summary or evidence, not the full workbook, raw assessment reports or private reflection. Check exports for identifying notes and hidden data.

Keep different purposes separate

Programme assurance should use the minimum appropriate aggregate or de-identified information. Formal assessment, selection, performance management and health support require their own purposes, evidence and permissions. Do not repurpose coaching records silently.

Technology and AI need a fresh check

Do not record, transcribe or upload session material to an AI service by default. Establish purpose, consent where appropriate, processing arrangements, retention, access, cross-border considerations and human responsibility before use. Verify applicable requirements with qualified owners. [H01, H04, R01]

Save a clean master

Keep an untouched workbook and make a working copy. Follow the start and setup instructions, use the exact tool index and retain important baseline versions. Formula cells are labelled; entered text and numeric values must still be reviewed by a competent practitioner.



Meridian: one fictional executive journey

The source case

H04 uses the fictional Meridian Infrastructure Group, including executive M-07 and MetroLink East, to illustrate strategic coaching and workplace transfer. These are teaching examples, not HR Delivery client findings. Source worked extracts retain that status. The new X activities use additional fictional episodes around the same executive role.

The recurring executive question

M-07 wants to lead cross-functional gate decisions more effectively without repeatedly taking back specialists' work. The role requires decision framing, constructive challenge, integration and clear ownership. It does not remove technical sign-off from specialists or material scope authority from the sponsor.

The initial hypothesis

Late evidence creates uncertainty. M-07 responds by supplying answers or rewriting recommendations, which may reduce others' ownership and reinforce waiting. This is a hypothesis, not a personality diagnosis. Supplier dependencies, unclear authority and workload are plausible alternative or additional explanations.

The practical experiments

M-07 tests a concerns-first meeting opening, clearer delegation checkpoints and an earlier decision brief. The examples show useful changes and continuing barriers. A supplier delay does not disappear merely because a leadership conversation improves.

A separate lesson from the ebook

Madar Facilities shows why a coaching pilot may need to change course after operational barriers become clearer. Its lesson is not that all difficulties are coaching problems. Keep the behaviour, result and explanation separate and assign system actions to the proper owner. Harbour's mentoring case remains a distinct example of knowledge transfer and career agency. [H01, pp.72-84]



Coaching and other forms of help

Coaching

An agreed developmental partnership using reflection, inquiry, challenge and practice. The coach may offer an observation or relevant information with permission, while preserving the coachee's ownership of choices. It is not simply never giving advice. [H01]

Mentoring

Relevant experience, advice, challenge and connections support development without taking ownership of the mentee's future. HR Delivery's MENTOR, BRIDGE and RELATE architectures remain distinct from the six A coaching journey. The executive toolkit does not silently replace the mentoring suite. [H01-H02]

Management and instruction

Managers retain responsibility for decisions, resources, standards and performance conversations. Missing knowledge may require instruction or supervised practice. Calling an instruction a coaching question can obscure power and responsibility.

Qualified specialist support

Clinical, legal, technical, safeguarding and other consequential needs require the appropriate qualified route. Pause ordinary coaching where necessary. A referral is a professional boundary decision, not a negative judgement about the coachee.

Team and system work

An individual's coaching contract does not authorise team assessment, organisational diagnosis or intervention in colleagues' private information. Use separate purposes, consent, competence and governance for team coaching, facilitation and system change.

When to pause, refer or re-contract

Immediate risk

Stop the routine activity. Where there is an immediate or likely serious danger, follow the locally verified emergency or safeguarding protocol and obtain appropriate qualified help. Stay within your role, use minimum necessary disclosure and do not delay action to complete a worksheet. [H01, H04]

Significant distress or a need outside competence

Acknowledge what the person has shared without diagnosing. Explain the boundary, discuss appropriate support and consult according to the agreed protocol. Coaching may pause or continue only where the scope and qualified advice make that appropriate.

A formal employment concern

Do not convert an allegation, grievance, discrimination concern or disciplinary issue into an informal coaching exercise. Explain the available formal route and any role conflict. Coaching may support the person, but it must not become a hidden investigation.

A changed purpose or sponsor

Review the agreement when a promotion assessment, performance process, new manager or new sponsor changes the use of information. Do not rely on the original consent for a materially different purpose.

A technology or privacy change

Pause a new recording, transcription, AI or data-sharing use until the purpose and safeguards have been reviewed. Neither convenience nor an employer subscription establishes permission to upload private coaching content.

A relationship that is not useful

Invite feedback, repair where appropriate and offer the agreed rematch or exit route. Do not diagnose the coachee as resistant because the match or method does not fit.



SOURCE CONTINUITY

The ebook and this toolkit

Page references below refer to the supplied 131-page D6 ebook, not this manual.

Ebook area	Pages	Source contribution	Toolkit application
Framework	6-8	6A, three levels, six enablers and quality lens	Model opening; all six A sections
Defining and selecting help	9-18	Coaching, mentoring, management and specialist boundaries	T03, X08; help and pause routes
Contracting	19-23	Trustworthy agreement and sponsor boundaries	T13-T24, X09-X14
Listening and reflection	25-28	Inquiry, meaning and checked interpretation	T37-T43, X14, X27
Goals and action	29-33	Observable goals, evidence and small practice	T31-T33, X55-X61
Feedback and challenge	34-38	Behaviour, perspective and agency	X22-X24, X46-X50
Mentoring	40-45	Experience and advice without imposing a career	Kept distinct; not renamed as coaching
Ethics and difficult situations	46-50	Competence, conflicts, referral and repair	T20-T24, T69-T72, X11, X52
Programme design	51-57	Access, matching, governance and capacity	T01-T12, T75-T84
Practitioner development	58-62	Observed practice and support	T68, T77, T79-T80
Evaluation and closure	63-71	Contribution, independence and endings	T61-T74, X69-X72

The mappings are editorial navigation aids. The ebook is not the complete 88-tool suite, and its C-resource IDs do not replace T01-T88. Where an internal ebook reference differs from an actual resource heading, use the heading and page range shown here. New activities remain X01-X72.



The ebook and this toolkit

Page references below refer to the supplied 131-page D6 ebook, not this manual.

Ebook area	Pages	Source contribution	Toolkit application
Madar Facilities case	72-79	A fictional coaching pilot reveals operational barriers	Separate case lesson; not merged with Meridian
Harbour mentoring case	80-84	Knowledge transfer and career agency	Mentoring distinction retained
Assessment companion	85-88	Preference, judgement, behaviour and technical limits	46-offering selector; X23-X24
Practitioner learning pathway	89-91	A learning route, not a qualification	Session designs and supervised practice guidance
Worked and reusable resources	92-122	Separate ebook resource IDs and records	Linked conceptually, not renumbered as T tools
C03 resource heading	99-101	Goal, baseline and workplace experiment	T31-T33, T51, X55; use actual heading/pages
Framework connections	125-126	Coaching sits within wider HR and OD work	System actions retained alongside coaching
Sources and responsible use	127-131	Evidence, permissions and publication limits	Source register and edition notes

The mappings are editorial navigation aids. The ebook is not the complete 88-tool suite, and its C-resource IDs do not replace T01-T88. Where an internal ebook reference differs from an actual resource heading, use the heading and page range shown here. New activities remain X01-X72.



Sources and practice notes

What the framework preserves, what the research informs and what remains an educational adaptation.

Use the method. Keep the evidence. Protect the relationship.

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- H01** **HR Delivery (2026). Coaching and Mentoring at Work. D6 editorial edition.**
Source publication
Supplied 131-page ebook. Governs distinctions, relationship practice, cases and assessment cautions.
Supplied: D6_Coaching_and_Mentoring.pdf
- H02** **HR Delivery (2026). 6A Workplace Coaching System: One-page Framework, second edition.**
Source framework
Controlling six stages, three levels, six enablers and four-part quality lens.
HR_Delivery_Workplace_Coaching_One_Page_Framework.pdf
- H03** **HR Delivery (2026). Workplace Coaching White Paper, second edition.**
Source publication
Organisational rationale, evidence and operating architecture. Maturity labels differ from H04 Appendix M; see edition crosswalk.
HR_Delivery_Workplace_Coaching_White_Paper.pdf
- H04** **HR Delivery (2026). Workplace Coaching Extensive Toolkit, second edition.**
Source toolkit
88 original tool IDs and titles retained. Operational templates re-presented; selected conflicts are disclosed and resolved against the controlling framework.
HR_Delivery_Workplace_Coaching_Extensive_Toolkit.pdf



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

H05 HR Delivery. Assessment catalogue.

Catalogue / checked 12 October 2026

Live catalogue reviewed for names and intended applications. A catalogue is not technical validation or a licence to reconstruct a test.

<https://hr.delivery/hr-delivery/assessments>

R01 International Coaching Federation. Code of Ethics (effective 1 April 2025).

Professional standard

Ethical relationship, responsibilities, agreements, confidentiality, conflicts and accountable practice.

<https://coachingfederation.org/credentialing/coaching-ethics/icf-code-of-ethics/>

R02 International Coaching Federation. 2025 Core Competencies.

Professional standard

Competence reference, not a qualification granted by this toolkit.

<https://coachingfederation.org/wp-content/uploads/2025/09/icf-cs-core-competencies-2025.pdf>

R03 Global Code of Ethics. Fourth version, December 2025.

Professional standard

Public code and version reference. Apply the professional code governing your actual practice.

<https://globalcodeofethics.org/>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R04** **International Test Commission. International Guidelines for Test Use.**
Testing guidance
Competent, appropriate and ethical test use, with evidence relevant to intended purpose.
<https://www.intestcom.org/page/15>
- R05** **International Test Commission. Guidelines for Translating and Adapting Tests, second edition.**
Testing guidance
Translation alone does not establish equivalent measurement or valid interpretation.
https://www.intestcom.org/files/guideline_test_adaptation_2ed.pdf
- R06** **Nicolau, Candel, Constantin and Kleingeld (2023). The effects of executive coaching on behaviors, attitudes, and personal characteristics: a meta-analysis of randomized control trial studies.**
Research synthesis
Average effects across interventions do not validate each exercise or guarantee individual outcomes.
<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1089797/full>
- R07** **Workplace coaching: a meta-analysis and recommendations for advancing the science of coaching (2023). Frontiers in Psychology, article 1204166.**
Research synthesis
Evidence for workplace coaching should be interpreted with design, measures and heterogeneity in view.
<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2023.1204166/full>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R08** **Grant, Curtayne and Burton (2009). Executive coaching enhances goal attainment, resilience and workplace well-being: a randomised controlled study.**
Primary coaching study
A specific multicomponent executive intervention; its results cannot be assigned to a standalone worksheet.
<https://doi.org/10.1080/17439760902992456>
- R09** **The Open University. Workplace learning: coaching and mentoring, section 5.2.**
Educational method
GROW as a conversation scaffold, not a substitute for contracting or responsive listening.
<https://www.open.edu/openlearn/money-business/workplace-learning-coaching-and-mentoring/content-section-5.2>
- R10** **McKergow and Jackson. The OSKAR coaching framework.**
Creator method
Outcome, Scaling, Know-how and resources, Affirm and Action, Review. This toolkit uses original executive prompts.
<https://sfwork.com/oskar-coaching>
- R11** **Motivational Interviewing Network of Trainers. Understanding motivational interviewing.**
Professional method
Collaborative exploration of ambivalence and autonomy; no claim of MI certification or treatment competence.
<https://motivationalinterviewing.org/node/11216>



Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R12** **Center for Creative Leadership. Situation-Behavior-Impact feedback model.**
Creator/practitioner method
Describe the situation, observed behaviour and impact, then inquire rather than assume intent.
<https://www.ccl.org/articles/leading-effectively-article/sbi-feedback-model-a-quick-win-to-improve-talent-conversations-development/>
- R13** **Marshall Goldsmith. Try Feedforward Instead of Feedback.**
Creator/practitioner method
Future-oriented suggestions are used with permission; this toolkit supplies an independent workplace application.
<https://www.marshallgoldsmith.com/post/try-feedforward-instead-of-feedback>
- R14** **Kegan and Lahey (2001). The Real Reason People Won't Change.**
Creator publication
Competing commitments and assumptions as a reflective hypothesis, not a diagnosis or reason to force disclosure.
<https://store.hbr.org/product/the-real-reason-people-won-t-change/R0110E>
- R15** **Harvard Program on Negotiation. Difficult conversations resource.**
Professional education
Separate observed impact from assumed intention; explore interests and contribution without excusing misconduct.
<https://www.pon.harvard.edu/wp-content/uploads/images/posts/dbcr29.pdf>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

R16 Neff. Exploring self-compassion through writing.

Creator practice

Inspires a brief, optional, work-focused reflective activity. The original exercise is not reproduced.

<https://self-compassion.org/exercises/exercise-3-exploring-self-compassion-through-writing/>

R17 Locke and Latham (2002). Building a practically useful theory of goal setting and task motivation.

Research synthesis

Specific goals, feedback and task complexity require judgement; performance targets are not always the best learning goals.

<https://doi.org/10.1037/0003-066X.57.9.705>

R18 Gollwitzer and Sheeran (2006). Implementation intentions and goal achievement.

Research synthesis

If-then plans connect a recognisable cue with a chosen action. Executive adaptation here is not separately validated.

[https://doi.org/10.1016/S0065-2601\(06\)38002-1](https://doi.org/10.1016/S0065-2601(06)38002-1)

R19 WOOP: Wish, Outcome, Obstacle, Plan.

Creator method

Creator guidance for mental contrasting with implementation intentions; use a feasible, ethical work wish.

<https://woopmylife.org/>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R20** **Mental contrasting with implementation intentions: meta-analysis (2021).**
Research synthesis
General goal-attainment evidence does not establish a fixed benefit for executives or any specific organisational outcome.
<https://pmc.ncbi.nlm.nih.gov/articles/PMC8149892/>
- R21** **Ryan and Deci (2000). Self-determination theory and the facilitation of intrinsic motivation, social development and well-being.**
Foundational research
Autonomy, competence and relatedness inform questions about conditions, not a new diagnostic score.
https://selfdeterminationtheory.org/SDT/documents/2000_RyanDeci_SDT.pdf
- R22** **University of Michigan, Center for Positive Organizations. Reflected Best Self Exercise.**
Licensed resource pointer
A separately licensed product. Our best-work episode review is an original activity, not a reproduction of the licensed exercise.
<https://positiveorgs.bus.umich.edu/cpo-tool/reflected-best-self-exercise/>
- R23** **University of Michigan, Center for Positive Organizations. Job Crafting Exercise.**
Licensed resource pointer
A separately licensed resource. Our role-crafting proposal is an independent work-design discussion, not its booklet or scoring.
<https://positiveorgs.bus.umich.edu/cpo-tool/job-crafting-exercise/>

Read the source. Check the use.

These records distinguish source publications, research, professional guidance and creator resources.

- R24** **Kross et al. (2014). Self-talk as a regulatory mechanism: how you do it matters.**
Primary experimental research
Experimental self-distancing evidence; our short executive reflection is an adaptation, not clinical treatment.
<https://pubmed.ncbi.nlm.nih.gov/24467424/>
- R25** **Lally et al. (2010). How are habits formed: modelling habit formation in the real world.**
Primary research
Habit formation varies. Do not promise that a behaviour will become automatic in 21 or 66 days.
<https://doi.org/10.1002/ejsp.674>
- R26** **Turner-Stokes (2009). Goal attainment scaling in rehabilitation: a practical guide.**
Method with transfer limitations
The toolkit borrows explicit individual anchors. It does not import clinical norms, T-scores or validation into executive coaching.
<https://www.kcl.ac.uk/nmpc/assets/rehab/6.-goal-attainment-scaling-a-practical-guide.pdf>



Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Agency	The coachee's meaningful ownership of choices within real constraints.
Alliance	Agreement on purpose and work, with a relationship that supports useful learning; not a score invented by this toolkit.
Assessment	A defined method of gathering evidence, whose intended use and technical basis matter.
Baseline	The starting evidence, with a defined behaviour, period, context and source.
Boundary	A limit of purpose, role, authority, competence, information or method.
Capability	What a person can demonstrate under relevant conditions, not merely a preference or confidence rating.
Capacity	The actual time, resources and support available to do the work.
Coachee	The person receiving coaching; their agency and information rights remain central.

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Coaching	A purposeful developmental partnership supporting reflection, choice, practice and learning.
Confidentiality	Agreed protection of information with explicit applicable limits, not absolute secrecy.
Contribution	A reasoned account of how coaching may have helped alongside other influences.
Counterexample	Evidence that qualifies or challenges a proposed pattern or interpretation.
Experiment	A small, ethical attempt to test a practice and learn from the result.
Four-way contract	Agreement covering coachee, coach, sponsor and programme owner, with other support roles explicit.
Goal anchor	A predefined description of a level of attainment for one specific goal.
Hypothesis	A provisional explanation or prediction open to testing and revision.

Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Impact	A consequence experienced in work; not established by attendance or satisfaction alone.
Interpretation	Meaning assigned to evidence, distinguishable from the evidence itself.
Mentoring	Development through relevant experience, advice, challenge and connections while respecting the mentee's direction.
Programme owner	The role accountable for the coaching service's design, operations and governance.
Re-contracting	Reviewing and revising an agreement when purpose, roles, risks or conditions change.
Referral	Connecting a need to an appropriate qualified route beyond the coach's remit.
Sponsor	The commissioning or supporting role; funding does not confer ownership of private session content.
Supervision	Reflective and ethical professional support for the coach's practice and judgement.



Use the same words carefully.

Practical definitions for this toolkit; a named assessment or professional code may use a more specific definition.

Term	Working meaning
Transfer	Use and adaptation of learning in actual work.
Validation	Evidence supporting a specified interpretation and use, not a property established by a polished report.



EDITION AND RESPONSIBLE USE

Executive Coaching Framework & Toolkit

Visual Practice Edition / October 2026 / HR Delivery

Scope and source continuity

The original 606-page manual is the content and pagination master. All 160 tool identifiers are retained: T01-T88 and X01-X72. The 6A names, operating levels, enablers, quality lens, assessment companion and D6 ebook crosswalk remain intact.

Presentation revision

All 72 executive activities have redesigned working forms and matching worked examples. Fifteen core coaching tools also have redesigned forms and examples. Registers, contracts and other tools retain tabular formats when that is the useful working format.

Examples and measures

Source case examples remain fictional. Plotted positions that are not numerical source data are labelled illustrative. Wheels and personal scales are reflection aids, not validated tests, norms or predictions. No missing data are invented to make a chart look complete.

Use and professional responsibility

This is an educational and practical aid, not accreditation, clinical treatment, legal advice or technical authorisation. Use appropriate competence, consent, qualified advice and organisational processes for consequential decisions.

Source and intellectual property

Third-party model names and materials remain with their owners. Protected assessment item banks and separately licensed commercial exercise booklets are not reproduced. New visual working layouts do not alter the evidence status of a method.

Publication and privacy

The foreword remains prepared for Dr Phillip Welsh's review and approval. Keep one engagement per working copy and share only agreed outputs. Different workbook tabs are not a confidentiality boundary, and the complete workbook is not a sponsor report.

Working files and navigation

The manual has 606 pages; the coachee pack has 88. Original page references remain valid. The Excel workbook contains 183 tabs: the original 175 plus one visual index and seven additional working views. It includes seven new native charts alongside the original eight.

Access and quality boundaries

PDF text fields can be completed in a compatible reader; use its drawing tool for freehand plotting. Live numerical charts are in Excel. Cover imagery is conceptual brand artwork. Technical and visual checks are not PDF/UA certification or independent professional approval.



THE SIX-GUIDE SUITE

Six focused guides. One complete source.

All 606 pages of the Visual Practice Edition are represented across this suite. Shared foundations and references are intentionally repeated.

01

ALIGN

Charter + value hypothesis

[01_Align_Executive_Coaching_Guide.pdf](#)

140 guide pages | Core source section 27-109

02

AGREE

Four-way contract

[02_Agree_Executive_Coaching_Guide.pdf](#)

102 guide pages | Core source section 110-173

03

ASSESS

Goal + baseline + formulation

[03_Assess_Executive_Coaching_Guide.pdf](#)

154 guide pages | Core source section 174-289

04

ACTIVATE

Insight + options + commitment

[04_Activate_Executive_Coaching_Guide.pdf](#)

163 guide pages | Core source section 290-409

05

APPLY

Experiments + transfer plan

[05_Apply_Executive_Coaching_Guide.pdf](#)

115 guide pages | Core source section 410-486

06

ASSURE

Quality + value decision

[06_Assure_Executive_Coaching_Guide.pdf](#)

124 guide pages | Core source section 487-572

The ZIP includes a source-page map showing the primary guide and local page for every master page. Keep all six PDF filenames unchanged in the same folder for cross-guide links. The existing Designer Edition Excel workbook uses the same T and X tool identifiers.