



Assess

Framework & toolkit

Understand the executive in context and turn proportionate assessment evidence into a useful coaching focus.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

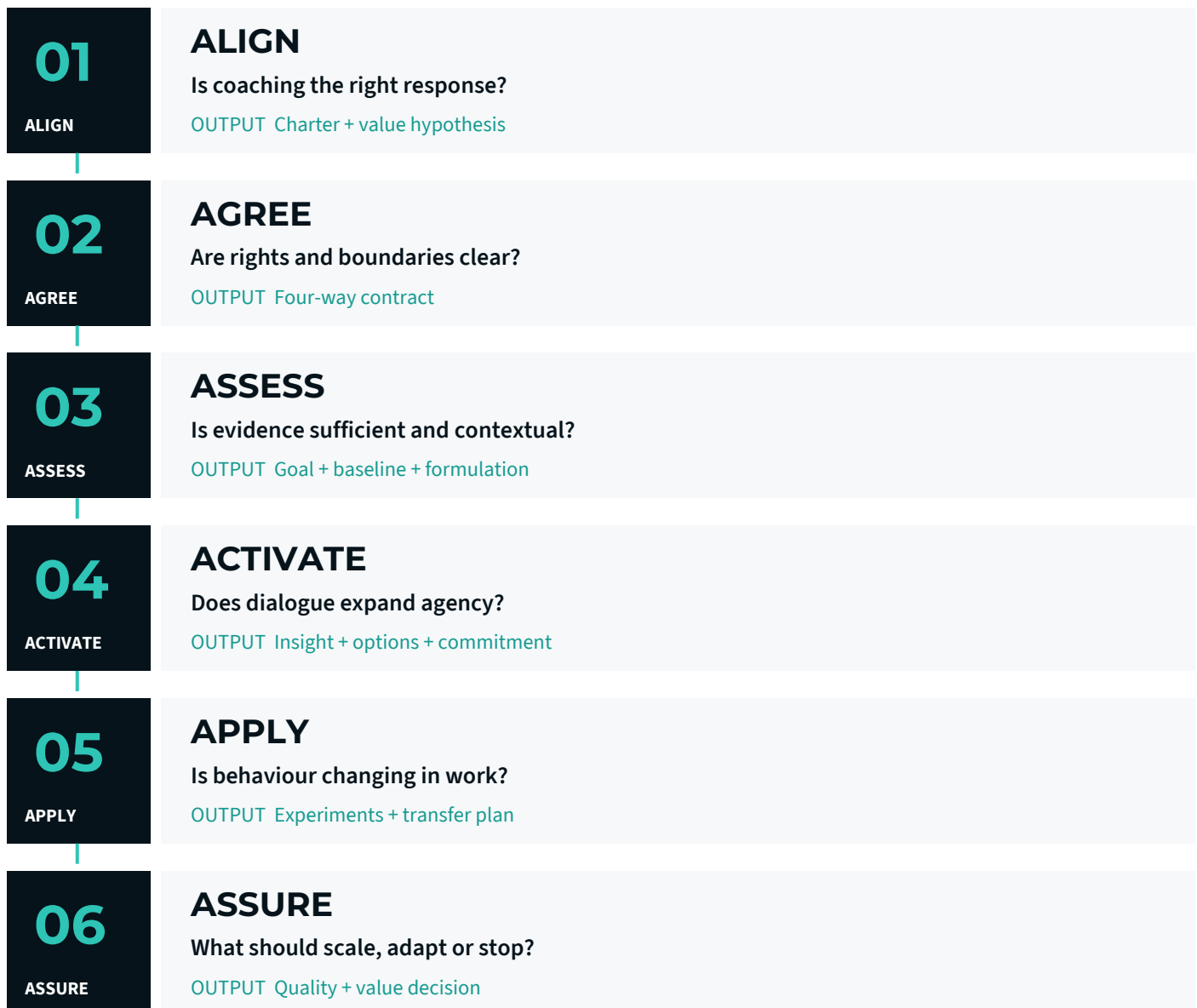
06 Assure

28 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

ASSESS / INTRODUCTION

Understand before interpreting.

What this guide is for

Assess brings together the complete assessment section of the Visual Practice Edition, including the assessment-to-coaching companion, core evidence tools and X15-X30 activities. Its purpose is a context-grounded understanding of the executive's goal, not a requirement to complete a diagnostic battery.

Begin with episodes and context

Explore a recent leadership event, the action taken, what others experienced and the conditions around it. The lifeline, context wheel, relationship map, calendar audit and decision reconstruction help make that account visible. Use counterexamples as well as apparent patterns. A worksheet is a reflection aid, not a diagnosis.

Choose evidence for a question

The assessment companion reviews the catalogue options and suggests coaching applications. It keeps preference, judgement, experienced behaviour, reasoning and contextual evidence distinct. Retain the source requirements for authorised administration, appropriate interpretation, language and population suitability, privacy and technical guidance.

Debrief without reducing the person

A preference does not establish competence; a scenario response is not direct observation of everyday work. Feedback from different groups may reflect different experiences. Use the full assessment-and-360 debrief session included after the tools to practise a conversation that protects those distinctions and leads to an owned next step.

Make the baseline useful

Define the work situation, observable behaviour, evidence source and review period. Build a provisional formulation with the coachee, including role and system conditions. Record an alternative explanation and what would change the account. The visual worksheets and examples are retained in full, including the genuine context wheel and plotting activities.

Before moving on

Use the Assess gate: is evidence sufficient and contextual? Leave with a goal, a usable baseline and a formulation open to revision. Activate supports the next conversation about insight, options and commitment; Apply follows the resulting experiment into work. More information is not always the most useful next move.

THE ASSESS DECISION

Is evidence sufficient and contextual? Minimum output: Goal + baseline + formulation.

Based on the main manual: Assess practitioner brief and operating route, master pp. 177-178.

A FOREWORD PREPARED FOR DR PHILLIP WELSH

Let evidence open the conversation.



DR PHILLIP WELSH

Founder and Managing Director / HR Delivery

A foreword for the Assess guide

Stay curious about the person

Assessment is most useful when it helps a coach and executive ask a better question. It becomes less useful when a score or a profile closes the conversation too early. A person's role, relationships and opportunities to act belong beside any instrument or account of behaviour.

Hold the distinctions

The Assess material keeps different kinds of evidence separate. A natural preference is not the same as demonstrated capability. A colleague's feedback is an important perspective, not the whole person. A pattern in a work episode may suggest a hypothesis, but it also deserves a counterexample and a check against the conditions in which the work occurred.

Make thinking visible

The wheel, lifeline, maps and structured reviews in this guide create different ways to explore experience. Use the format that serves the question. There is no need to force a number onto a reflection or make a chart look complete when the evidence is missing. The executive should be able to recognise, question and revise the account being developed.

Leave with a useful next step

My hope is that the guide strengthens both care and precision in assessment conversations. Select proportionate evidence, explain its limits and connect the insight with a small opportunity to learn in work. Sometimes that will be a behavioural experiment. Sometimes it will be a clarification of authority or a request for support. Both can be valuable outcomes of thoughtful assessment.

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



[CONTENTS / THIS GUIDE](#)

Find your way through Assess.

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

The 6A model and operating levels	002
Introduction	004
Foreword	005
How to use this standalone guide	007
Local tool and activity index	008
Assess: complete section and original divider	010
Practitioner brief and operating route	013
Assessment-to-coaching companion	015
Complete session design	126
Shared foundations and source guidance	129
Ebook-to-toolkit crosswalk	138
Sources and further practice	140
Working glossary	149
Edition and responsible use	153
The six-guide suite and coverage	154

[GUIDE / WORKSHEET / EXAMPLE](#)

The original 28 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 Assess gate: Is evidence sufficient and contextual? 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
T25	Readiness and expectations check	042	043	044
T26	Person-role-system scan	045	046	047
T27	Strengths evidence map	048	049	050
T28	Critical moments analysis	051	052	053
T29	Stakeholder perspective plan	054	055	056
T30	Psychometric use check	057	058	059
T31	Goal architecture canvas	060	061	062
T32	Baseline evidence record	063	064	065
T33	Goal attainment scale	066	067	068
T34	Barrier and leverage map	069	070	071
T35	Learning preference and access profile	072	073	074
T36	Coaching formulation	075	076	077
X15	Leadership lifeline	078	079	080
X16	Best-work episode review	081	082	083

THE ASSESS DECISION

Is evidence sufficient and contextual? Minimum output: Goal + baseline + formulation.



Open the guide. Use the worksheet.

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

ID	Tool / activity	Guide	Sheet	Example
X17	Strengths dosage: underuse and overuse	084	085	086
X18	Values trade-off cards	087	088	089
X19	Energy and attention diary	090	091	092
X20	Calendar versus contribution audit	093	094	095
X21	Critical decision reconstruction	096	097	098
X22	Stakeholder perception interviews	099	100	101
X23	Leadership 360 debrief	102	103	104
X24	Assessment-to-experiment bridge	105	106	107
X25	Relationship system map	108	109	110
X26	Delegation bottleneck review	111	112	113
X27	Assumptions and contrary evidence	114	115	116
X28	Control, influence and system action	117	118	119
X29	Leadership context wheel	120	121	122
X30	Integrated coaching formulation	123	124	125

THE ASSESS DECISION

Is evidence sufficient and contextual? Minimum output: Goal + baseline + formulation.



THE 6A WORKPLACE COACHING SYSTEM

03

Assess

Evidence improves the question

THE GATE

Is evidence sufficient and contextual?

MINIMUM OUTPUT

Goal + baseline + formulation

28 TOOLS & ACTIVITIES

Open the stage tool directory >



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESS / TOOL DIRECTORY

Assess: tools to use

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

ID	Tool / activity	Guide	Form	Example
T25	Readiness and expectations check	206	207	208
T26	Person-role-system scan	209	210	211
T27	Strengths evidence map	212	213	214
T28	Critical moments analysis	215	216	217
T29	Stakeholder perspective plan	218	219	220
T30	Psychometric use check	221	222	223
T31	Goal architecture canvas	224	225	226
T32	Baseline evidence record	227	228	229
T33	Goal attainment scale	230	231	232
T34	Barrier and leverage map	233	234	235
T35	Learning preference and access profile	236	237	238
T36	Coaching formulation	239	240	241
X15	Leadership lifeline	242	243	244
X16	Best-work episode review	245	246	247

BEFORE YOU MOVE ON

Is evidence sufficient and contextual? Complete or revisit: Goal + baseline + formulation.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESS / TOOL DIRECTORY

Assess: tools to use

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

ID	Tool / activity	Guide	Form	Example
X17	Strengths dosage: underuse and overuse	248	249	250
X18	Values trade-off cards	251	252	253
X19	Energy and attention diary	254	255	256
X20	Calendar versus contribution audit	257	258	259
X21	Critical decision reconstruction	260	261	262
X22	Stakeholder perception interviews	263	264	265
X23	Leadership 360 debrief	266	267	268
X24	Assessment-to-experiment bridge	269	270	271
X25	Relationship system map	272	273	274
X26	Delegation bottleneck review	275	276	277
X27	Assumptions and contrary evidence	278	279	280
X28	Control, influence and system action	281	282	283
X29	Leadership context wheel	284	285	286
X30	Integrated coaching formulation	287	288	289

BEFORE YOU MOVE ON

Is evidence sufficient and contextual? Complete or revisit: Goal + baseline + formulation.

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



ASSESS / THE PRACTITIONER BRIEF

Evidence improves the question

Assess develops a proportionate, context-grounded understanding of the executive's goal. It combines the coachee's account with relevant work evidence and, only where useful, authorised assessment. It is not a requirement to administer a battery. The ebook keeps preference, judgement, experienced behaviour, reasoning and contextual evidence distinct. [H01, H04, H05]

Begin with episodes

Ask what happened, what the executive did, what others experienced and what the conditions allowed. Use examples and counterexamples. A lifeline, a decision reconstruction or a delegation review can reveal useful questions without creating a psychological label.

Select assessments by question

State the uncertainty an instrument might help explore. Confirm intended use, language, relevant population evidence, qualifications, accessibility and report access. A public catalogue confirms an offer, not validation. Do not recreate item banks or use coaching to train someone on protected assessment answers.

Interpret with humility

A preference is not capability. A scenario response is not a direct observation of daily work. A 360 report is a set of perspectives, with group protections and different observation opportunities. Agreement can strengthen a hypothesis; disagreement may identify context, not error.

Make the baseline usable

Define the behaviour, opportunity, observation window and evidence source. Preserve missing observations and changes in context. A count of sessions or a positive experience score is not a baseline for executive capability. Where individual goal anchors are used, define them before seeing the result.

Formulate collaboratively

Build a brief account of the pattern that may be maintaining the issue, including role, relationships and system conditions. State an alternative explanation and what would change the account. The coachee can revise or reject the formulation. Do not import clinical diagnosis into a work-development conversation.

Move from insight to a test

Choose a small practice or information-gathering step. A report is not the endpoint. Use the assessment-to-experiment bridge to specify behaviour, boundary, support and follow-up evidence. The best next step may be a management clarification rather than a more elaborate assessment.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESS / OPERATING ROUTE

Choose the next useful move.

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

01

Understand the person in work

T25, T26, X15, X16, X21 / Episodes, strengths and context

02

Examine conditions

X19, X20, X25, X26, X28 / Time, relationships and constraints

03

Choose evidence carefully

T29, T30, X22, X23, X24 / Assessment selection and debrief

04

Set a meaningful goal

T31, T32, T33 / Goal, baseline and anchors

05

Build the shared hypothesis

T34, T35, T36, X30 / Formulation and next decision

GATE REVIEW

Is evidence sufficient and contextual? Record the evidence, unresolved conditions and next owner. Return to an earlier A if the current account no longer fits.



Purpose before instrument.

A review of 46 catalogue offerings, with independent coaching applications and routes into the activity library.

What this companion does

It identifies questions that an assessment may help explore and shows how a practitioner can move from an authorised report to a work experiment. The catalogue names are retained; the coaching routes and questions are original educational applications. Not every offer is appropriate for every executive.

What it does not establish

Public descriptions do not establish reliability, validity, suitable norms, language equivalence or permissions for a specific use. Obtain the current technical manual, qualifications, adjustments and authorised report. No protected item bank or scoring key is reproduced. [H01, H05, R04-R05]

Keep the evidence type visible

Preference describes a tendency; judgement concerns presented choices; a 360 concerns experienced behaviour; ability tests concern specified performance demands; simulations provide bounded evidence. They should not be added into a single psychological verdict.

Choose less when less is enough

Begin with the developmental question, existing evidence and the uncertainty that remains. A work episode, role clarification or stakeholder conversation may answer it without testing. Combined pathways need a reason for every component.

Debrief before acting

Check readiness, explain the report and invite the coachee's interpretation. Explore a strength, a discrepancy and a limitation using examples and counterexamples. Preserve rater protections and do not infer motives or clinical conditions.

Finish with work evidence

Use X24 to specify a hypothesis, practice, boundary and feedback source. A new work observation may be more useful than an immediate retest. Obtain a separate team contract before using team-level results; do not attribute aggregate findings to one leader.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESS / INSTRUMENT-TO-ACTIVITY SELECTOR

Find the relevant evidence: 1 of 3

Names identify catalogue offers. The suggested coaching use is this edition's interpretation, not an endorsement for a consequential decision.

Code	Catalogue name	Evidence lens	Activity route
CMA	Cultural Match Assessment	Culture-related preferences	X05, X18, X25
PSN	Personal Strengths Navigator	Relative strengths and preferences	X16, X17, X24
FCA	Full Career Assessment	Integrated career exploration	X01, X03, X07
BCA	Behavioural Competency Assessment	Competency-related assessment	X21, X24, X63
TCA	Technical Competency Assessment	Technical evidence	X01, X08, X63
LPQ	Learning Preference Questionnaire	Learning preferences	X14, X60, X66
CCA	Career Compass Assessment	Career exploration	X03, X05, X07
WSI	Work Styles Indicator	Work preferences	X17, X25, X34
CRA	Conflict Response Assessment	Conflict-response preferences	X27, X46, X48
PPP	Personality Pattern Profile	Personality-pattern self-report	X15, X24, X30
RMA	The Relate Map Assessment	Relationship preferences and needs	X25, X34, X59
PIP	Personal Insights Profile	Personal insight	X15, X24, X30
TWI	Team Workstyles Indicator	Team-level workstyle picture	X25, X56, X58
TCP	Team Contribution Profile	Team contribution lens	X25, X55, X59
TPW	Team Performance WatchPoints	Team conditions	X25, X28, X58
MMAC	Managerial Assumptions, Arguments and Conclusions	Reasoning and judgement	X21, X27, X43

BASIS H01 assessment companion / H05 catalogue | Confirm version, suitability and authorised administration



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESS / INSTRUMENT-TO-ACTIVITY SELECTOR

Find the relevant evidence: 2 of 3

Names identify catalogue offers. The suggested coaching use is this edition's interpretation, not an endorsement for a consequential decision.

Code	Catalogue name	Evidence lens	Activity route
MSJ	Managerial Situational Judgement Test	Scenario judgement	X21, X24, X46
5D16F	5 Dimension 16 Factor Assessment	Multidimensional management assessment	X24, X30, X63
LPP	Leadership Preference Profile	Relative leadership preference	X02, X17, X24
LSJ	Leadership Situational Judgement	Leadership scenario judgement	X21, X35, X52
LEAD360	Leadership 360 Feedback	Multi-source experienced behaviour	X22, X23, X64
CLA	Contextual Leadership Assessment	Task-specific leadership judgement	X26, X48, X55
SSA	Shadow Self Assessment	Pressure and strength-overuse patterns	X17, X39, X68
EQA	Emotional Intelligence Assessment	Work-related emotional capabilities	X39, X40, X46
NDR	Numerical and Data Reasoning Assessment	Reasoning performance	X21, X35, X65
AAR	Abstract and Adaptive Reasoning Assessment	Reasoning performance	X21, X27, X37
CPSA	Cognitive Processing and Learning Speed Assessment	Cognitive performance	X08, X24, X63
AAE	Attention, Accuracy and Error Detection Assessment	Accuracy-related performance	X19, X21, X63
EPPA	Executive Planning and Prioritisation Assessment	Planning and prioritisation judgement	X04, X20, X35
SRCPS	Systems Reasoning and Complex Problem Solving Assessment	Systems reasoning	X25, X27, X37
DSIM1	Direction Simulation	Simulation evidence	X02, X21, X37
DSIM2	Development Simulation	Simulation evidence	X24, X46, X55

BASIS H01 assessment companion / H05 catalogue | Confirm version, suitability and authorised administration



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESS / INSTRUMENT-TO-ACTIVITY SELECTOR

Find the relevant evidence: 3 of 3

Names identify catalogue offers. The suggested coaching use is this edition's interpretation, not an endorsement for a consequential decision.

Code	Catalogue name	Evidence lens	Activity route
DSIM3	Delivery Simulation	Simulation evidence	X04, X35, X56
AC03	Career Combination	Career exploration	X03, X05, X07
AC08	Combined Leadership Assessment	LSJ, competency-based interview and LPP	X21, X24, X30
AC06	General Leadership Development	LSJ, LPP and CLA	X17, X24, X55
AC05	General Management Development	MMAC, MSJ and 5D16F	X21, X24, X30
AC09	Graduate Potential Combination	Combined early-career evidence	X08, X24, X63
AC10	High Potential Ability Combination	Combined ability evidence	X08, X24, X37
AC07	Leadership Discovery Combination	LEAD360, EQA and SSA	X23, X24, X39
AC12	Managerial Execution Combination	Combined execution evidence	X04, X24, X56
AC11	Operational Reliability Combination	Combined operational evidence	X08, X21, X63
AC01	Personal Development Combination	Combined personal-development evidence	X15, X24, X30
AC02	Personal Discovery Combination	PSN, RMA and CRA	X17, X25, X48
AC13	Strategic Leadership Ability Combination	Combined reasoning evidence	X21, X35, X37
AC04	Team Combination	Combined team evidence	X25, X56, X58

ASSESSMENT-TO-COACHING APPLICATION

CMA

Cultural Match Assessment

Culture-related preferences

COACHING QUESTION

Explore the relationship between personal work expectations and the culture experienced, without judging a person as a cultural misfit.

DEBRIEF PROMPTS

Does the described preference fit your actual work experience?

What in the environment helps or obstructs you?

Which expectation should be discussed rather than assumed?

ACTIVITY ROUTE

X05, X18, X25

NEXT WORK EVIDENCE

Ask for a concrete example of the desired working condition and negotiate one practical adjustment.

INTERPRETATION LIMIT

Not a licence to screen out difference or infer values from nationality.

PSN

Personal Strengths Navigator

Relative strengths and preferences

COACHING QUESTION

Explore useful contribution, energy and the dosage of a strength in a current executive challenge.

DEBRIEF PROMPTS

Where has this strength helped?

Where has it been too much or absent?

What complementary practice would the task need?

ACTIVITY ROUTE

X16, X17, X24

NEXT WORK EVIDENCE

Apply one recognised strength deliberately and seek feedback on its usefulness.

INTERPRETATION LIMIT

Relative preference does not establish superior capability or justify comparisons between people.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

FCA

Full Career Assessment

Integrated career exploration

COACHING QUESTION

Explore plausible career directions alongside aspirations, actual opportunities and role requirements.

DEBRIEF PROMPTS

What options does the report open?

What does it leave out about your circumstances?

What real evidence or conversation is needed next?

ACTIVITY ROUTE

X01, X03, X07

NEXT WORK EVIDENCE

Arrange one information interview or bounded role exploration.

INTERPRETATION LIMIT

Not a guarantee of suitability, promotion, employment or a vacancy.

BCA

Behavioural Competency Assessment

Competency-related assessment

COACHING QUESTION

Discuss development against an explicitly identified role model and appropriate level.

DEBRIEF PROMPTS

Which behaviour is being assessed?

What evidence from work supports or contradicts the pattern?

What task would let you practise it safely?

ACTIVITY ROUTE

X21, X24, X63

NEXT WORK EVIDENCE

Choose a role-relevant practice with feedback and review.

INTERPRETATION LIMIT

Retain the authorised competency taxonomy; a score is not a complete account of behaviour.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

TCA

Technical Competency Assessment

Technical evidence

COACHING QUESTION

Clarify a technical development need that requires authorised specialist interpretation.

DEBRIEF PROMPTS

What is the technical requirement?

Who is qualified to interpret this result?

What instruction or supervised practice is needed?

ACTIVITY ROUTE

X01, X08, X63

NEXT WORK EVIDENCE

Refer the technical development action to a qualified owner while coaching supports planning and follow-through.

INTERPRETATION LIMIT

The coach must not confer technical competence, licence or authorisation.

LPQ

Learning Preference Questionnaire

Learning preferences

COACHING QUESTION

Discuss how the coachee likes to approach learning and broaden their practice options.

DEBRIEF PROMPTS

What learning approach do you prefer?

When has a different approach worked?

Which method best fits this task?

ACTIVITY ROUTE

X14, X60, X66

NEXT WORK EVIDENCE

Test two suitable learning approaches against actual task performance.

INTERPRETATION LIMIT

Preferences do not establish fixed learning styles or unique instructional effectiveness.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

CCA

Career Compass Assessment

Career exploration

COACHING QUESTION

Examine interests, contribution and possible directions without overriding the executive's own aspirations.

DEBRIEF PROMPTS

What feels relevant and what does not?

Which aspiration is yours rather than someone else's?

What evidence would clarify an option?

ACTIVITY ROUTE

X03, X05, X07

NEXT WORK EVIDENCE

Build a small exploration plan, including real role information and constraints.

INTERPRETATION LIMIT

Do not prescribe a career path from a profile or treat specialist careers as lesser outcomes.

WSI

Work Styles Indicator

Work preferences

COACHING QUESTION

Explore communication, pace and decision habits as hypotheses to compare with actual episodes.

DEBRIEF PROMPTS

When does the description fit?

Where is your behaviour different?

What does the situation require beyond preference?

ACTIVITY ROUTE

X17, X25, X34

NEXT WORK EVIDENCE

Try one context-appropriate adjustment in a working relationship.

INTERPRETATION LIMIT

Avoid fixed types, compatibility scores or explaining every difficulty through style.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

CRA

Conflict Response Assessment

Conflict-response preferences

COACHING QUESTION

Explore a wider range of responses to a specific disagreement.

DEBRIEF PROMPTS

What is your usual response protecting?

What are the stakes and authority here?

What alternative could fit better?

ACTIVITY ROUTE

X27, X46, X48

NEXT WORK EVIDENCE

Rehearse and test a context-specific response.

INTERPRETATION LIMIT

No conflict mode is universally best; formal harm and safety issues are not style differences.

PPP

Personality Pattern Profile

Personality-pattern self-report

COACHING QUESTION

Use the report cautiously as language for reflection, with authorised interpretation and work evidence.

DEBRIEF PROMPTS

What do you recognise?

What is not captured by the profile?

What concrete work hypothesis could be tested?

ACTIVITY ROUTE

X15, X24, X30

NEXT WORK EVIDENCE

Select one behaviour, not a new identity, for practice.

INTERPRETATION LIMIT

Not clinical diagnosis, destiny or a basis for unsupported suitability decisions.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

RMA

The Relate Map Assessment

Relationship preferences and needs

COACHING QUESTION

Explore how the coachee expresses relationship needs and understands others' experience.

DEBRIEF PROMPTS

What do you need from this relationship?

How do others know that?

What should you ask rather than infer?

ACTIVITY ROUTE

X25, X34, X59

NEXT WORK EVIDENCE

Hold one explicit expectations conversation.

INTERPRETATION LIMIT

Do not infer another person's needs from the coachee's profile or create a compatibility verdict.

PIP

Personal Insights Profile

Personal insight

COACHING QUESTION

Develop a focused self-reflection question, checking report claims against lived work experience.

DEBRIEF PROMPTS

What is useful here?

What evidence would qualify the interpretation?

Which next action belongs to you?

ACTIVITY ROUTE

X15, X24, X30

NEXT WORK EVIDENCE

Translate one supported insight into a small work experiment.

INTERPRETATION LIMIT

Confirm the instrument version and technical basis; avoid treating broad descriptions as proof.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

TWI

Team Workstyles Indicator

Team-level workstyle picture

COACHING QUESTION

Explore a team-related coaching question using appropriate team consent and group interpretation.

DEBRIEF PROMPTS

What is a team pattern rather than your individual score?

Whose experience may be missing?

What team agreement could help?

ACTIVITY ROUTE

X25, X56, X58

NEXT WORK EVIDENCE

Use a separately contracted team conversation or a modest coordination experiment.

INTERPRETATION LIMIT

Aggregate team findings must not be assigned to one leader; use the published minimum and privacy rules.

TCP

Team Contribution Profile

Team contribution lens

COACHING QUESTION

Discuss complementary contributions and how the team allocates work.

DEBRIEF PROMPTS

Which contribution is visible or absent?

Is the gap capability, opportunity or allocation?

What agreement could improve it?

ACTIVITY ROUTE

X25, X55, X59

NEXT WORK EVIDENCE

Test a clearer contribution or responsibility agreement.

INTERPRETATION LIMIT

Do not assign fixed team roles or infer individual incapability from a group pattern.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

TPW

Team Performance WatchPoints

Team conditions

COACHING QUESTION

Identify conditions worth investigating in a team-related development goal.

DEBRIEF PROMPTS

Which condition has evidence?

What could the team and system change?

What is outside an individual coaching contract?

ACTIVITY ROUTE

X25, X28, X58

NEXT WORK EVIDENCE

Route systemic concerns to the appropriate team or organisational owner.

INTERPRETATION LIMIT

A watchpoint is not a diagnosis or proof that the leader caused the condition.

MMAC

Managerial Assumptions, Arguments and Conclusions

Reasoning and judgement

COACHING QUESTION

Practise distinguishing assumptions, evidence and argument quality in managerial decisions.

DEBRIEF PROMPTS

What is stated and what is assumed?

What would weaken the conclusion?

What evidence would change your decision?

ACTIVITY ROUTE

X21, X27, X43

NEXT WORK EVIDENCE

Use a prospective decision journal and a checking question.

INTERPRETATION LIMIT

Do not infer personality, integrity or character from a reasoning result.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

MSJ

Managerial Situational Judgement Test

Scenario judgement

COACHING QUESTION

Explore reasoning in managerial situations and rehearse comparable, new work challenges.

DEBRIEF PROMPTS

Why did the response seem effective?

What competing demand did it address?

How does the actual work context differ?

ACTIVITY ROUTE

X21, X24, X46

NEXT WORK EVIDENCE

Rehearse a new, role-relevant situation and gather workplace evidence.

INTERPRETATION LIMIT

Preserve the report's published structure; do not silently relabel its domains.

5D16F

5 Dimension 16 Factor Assessment

Multidimensional management assessment

COACHING QUESTION

Explore a specific management-development question with the authorised manual and report.

DEBRIEF PROMPTS

What exactly does this scale claim to assess?

What evidence supports this use?

What practical learning question follows?

ACTIVITY ROUTE

X24, X30, X63

NEXT WORK EVIDENCE

Choose a bounded practice after qualified interpretation.

INTERPRETATION LIMIT

The name alone does not establish the constructs, validity or permissible decisions.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

LPP

Leadership Preference Profile

Relative leadership preference

COACHING QUESTION

Explore attention across Direction, Development and Delivery without equating preference with capability.

DEBRIEF PROMPTS

Where is attention naturally drawn?

What does the current role require?

What deliberate contribution could you practise?

ACTIVITY ROUTE

X02, X17, X24

NEXT WORK EVIDENCE

Select one less-emphasised but relevant contribution for a work experiment.

INTERPRETATION LIMIT

Do not seek numerical balance for its own sake or infer absolute competence.

LSJ

Leadership Situational Judgement

Leadership scenario judgement

COACHING QUESTION

Explore choices and trade-offs in leadership situations, then practise comparable original scenarios.

DEBRIEF PROMPTS

What made the choice attractive?

What longer-term consequence mattered?

What does real work add to the scenario?

ACTIVITY ROUTE

X21, X35, X52

NEXT WORK EVIDENCE

Rehearse a new decision and review the reasoning, not protected answers.

INTERPRETATION LIMIT

No coaching of live item answers; scenario scores do not perfectly describe workplace behaviour.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

LEAD360

Leadership 360 Feedback

Multi-source experienced behaviour

COACHING QUESTION

Examine differences between self-view and others' experience with privacy protections intact.

DEBRIEF PROMPTS

What differs across observation groups?

What episode could explain it?

What practice could colleagues observe next?

ACTIVITY ROUTE

X22, X23, X64

NEXT WORK EVIDENCE

Use one behavioural experiment and a targeted, consented follow-up.

INTERPRETATION LIMIT

Never identify raters or treat all perspectives as interchangeable; retain authorised group thresholds.

CLA

Contextual Leadership Assessment

Task-specific leadership judgement

COACHING QUESTION

Explore how direction and support can be adapted to a particular person's task and circumstances.

DEBRIEF PROMPTS

What does this task require?

What capability and support are available?

What would a clearer agreement change?

ACTIVITY ROUTE

X26, X48, X55

NEXT WORK EVIDENCE

Run a bounded delegation or support experiment.

INTERPRETATION LIMIT

Do not label a colleague permanently as low readiness or infer a fixed leadership style.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

SSA

Shadow Self Assessment

Pressure and strength-overuse patterns

COACHING QUESTION

Explore a possible trigger-response pattern without pathologising the executive.

DEBRIEF PROMPTS

What pressure cue do you recognise?

What does the pattern protect?

What alternative response is safe to test?

ACTIVITY ROUTE

X17, X39, X68

NEXT WORK EVIDENCE

Agree an early warning cue and a bounded response plan.

INTERPRETATION LIMIT

Non-clinical; not evidence of psychological danger, disorder or employment unfitness.

EQA

Emotional Intelligence Assessment

Work-related emotional capabilities

COACHING QUESTION

Explore a specific emotional or interpersonal work behaviour, using authorised interpretation.

DEBRIEF PROMPTS

What happens in the work episode?

What is within your choice?

What support or boundary is needed?

ACTIVITY ROUTE

X39, X40, X46

NEXT WORK EVIDENCE

Rehearse a response and review the experienced impact.

INTERPRETATION LIMIT

Not a mental-health diagnosis or a substitute for qualified support.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

NDR

Numerical and Data Reasoning Assessment

Reasoning performance

COACHING QUESTION

Clarify a development question about interpreting work data, where assessment is genuinely relevant.

DEBRIEF PROMPTS

What reasoning demand matters in your role?

Which errors or uncertainties need instruction?

What work task can test learning?

ACTIVITY ROUTE

X21, X35, X65

NEXT WORK EVIDENCE

Use relevant data-analysis training and a supported work example.

INTERPRETATION LIMIT

Ability evidence requires technical interpretation; do not infer motivation or personality.

AAR

Abstract and Adaptive Reasoning Assessment

Reasoning performance

COACHING QUESTION

Explore a specific need to recognise patterns and adapt reasoning to new information.

DEBRIEF PROMPTS

What task does this evidence relate to?

What does it not predict?

What supported practice is relevant?

ACTIVITY ROUTE

X21, X27, X37

NEXT WORK EVIDENCE

Combine instruction or practice with a real decision review.

INTERPRETATION LIMIT

Not a global measure of executive potential or proof of everyday adaptability.

ASSESSMENT-TO-COACHING APPLICATION

CPSA

Cognitive Processing and Learning Speed Assessment

Cognitive performance

COACHING QUESTION

Consider a narrowly defined learning or processing question with appropriate accommodations.

DEBRIEF PROMPTS

Is speed actually required by the task?

What access conditions affect interpretation?

What support is useful?

ACTIVITY ROUTE

X08, X24, X63

NEXT WORK EVIDENCE

Arrange task-relevant learning support rather than a generic confidence exercise.

INTERPRETATION LIMIT

Do not infer intelligence or employability beyond the authorised evidence and intended use.

AAE

Attention, Accuracy and Error Detection Assessment

Accuracy-related performance

COACHING QUESTION

Explore accuracy demands in a relevant task and the work conditions supporting them.

DEBRIEF PROMPTS

What errors matter in this task?

Which system controls are needed?

What practice or checking routine would help?

ACTIVITY ROUTE

X19, X21, X63

NEXT WORK EVIDENCE

Design a supported quality check in actual work.

INTERPRETATION LIMIT

Do not treat one test as proof of reliability, medical status or safety authorisation.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

EPPA

Executive Planning and Prioritisation Assessment

Planning and prioritisation judgement

COACHING QUESTION

Explore sequencing, constraints and replanning in a complex work task.

DEBRIEF PROMPTS

What did you prioritise and why?

Which constraint changed the plan?

What would you stop or resequence?

ACTIVITY ROUTE

X04, X20, X35

NEXT WORK EVIDENCE

Use a live priority review and prospective decision record.

INTERPRETATION LIMIT

Check current pilot and technical status; do not present it as validated prediction of executive performance.

SRCPs

Systems Reasoning and Complex Problem Solving Assessment

Systems reasoning

COACHING QUESTION

Explore a bounded question about interdependencies and competing explanations.

DEBRIEF PROMPTS

Which relationship did you notice?

What alternative explanation was missed?

What evidence could test the system hypothesis?

ACTIVITY ROUTE

X25, X27, X37

NEXT WORK EVIDENCE

Map one real dependency and test a checking question.

INTERPRETATION LIMIT

A test is not a complete organisational diagnosis or licence to redesign a system alone.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

DSIM1

Direction Simulation

Simulation evidence

COACHING QUESTION

Discuss strategic framing and judgement using authorised simulation feedback.

DEBRIEF PROMPTS

What decision did the simulation require?

Which evidence changed your view?

How does the real role differ?

ACTIVITY ROUTE

X02, X21, X37

NEXT WORK EVIDENCE

Rehearse a new strategic decision and review work evidence.

INTERPRETATION LIMIT

Simulation performance is not actual business achievement or complete succession readiness.

DSIM2

Development Simulation

Simulation evidence

COACHING QUESTION

Explore people-development and stakeholder choices in a supported developmental context.

DEBRIEF PROMPTS

What did the response enable for others?

What context was missing?

What behaviour could be practised safely?

ACTIVITY ROUTE

X24, X46, X55

NEXT WORK EVIDENCE

Use a delegation or feedback experiment with consent.

INTERPRETATION LIMIT

Retain simulation scoring and privacy rules; avoid training participants on protected answers.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

DSIM3

Delivery Simulation

Simulation evidence

COACHING QUESTION

Explore execution, prioritisation and accountability in realistic work decisions.

DEBRIEF PROMPTS

What did you prioritise?

What risk or dependency mattered?

What would you change in a real work routine?

ACTIVITY ROUTE

X04, X35, X56

NEXT WORK EVIDENCE

Test an accountable decision or handover routine.

INTERPRETATION LIMIT

Do not equate successful simulation completion with operational authorisation.

AC03

Career Combination

Career exploration

COACHING QUESTION

Use only when the combined career evidence adds something to a specific aspiration or transition question.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X03, X05, X07

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

AC08

Combined Leadership Assessment

LSJ, competency-based interview and LPP

COACHING QUESTION

Clarify whether the process is developmental or consequential before combining judgement, interview and preference evidence.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X21, X24, X30

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC06

General Leadership Development

LSJ, LPP and CLA

COACHING QUESTION

Explore leadership judgement, natural emphasis and task-specific adaptation as distinct evidence.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X17, X24, X55

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

AC05

General Management Development

MMAC, MSJ and 5D16F

COACHING QUESTION

Keep reasoning, scenario judgement and the multidimensional report distinct in a management-development question.

DEBRIEF PROMPTS

Why is each component needed?
What do the results agree or disagree about?
What real work evidence will test the interpretation?

ACTIVITY ROUTE

X21, X24, X30

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC09

Graduate Potential Combination

Combined early-career evidence

COACHING QUESTION

Usually not the first choice for an established executive; require a specific role-transition rationale.

DEBRIEF PROMPTS

Why is each component needed?
What do the results agree or disagree about?
What real work evidence will test the interpretation?

ACTIVITY ROUTE

X08, X24, X63

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

AC10

High Potential Ability Combination

Combined ability evidence

COACHING QUESTION

Use only for a clearly defined cognitive-development question with qualified interpretation, not an informal potential label.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X08, X24, X37

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC07

Leadership Discovery Combination

LEAD360, EQA and SSA

COACHING QUESTION

Compare experienced behaviour, emotional capability and pressure patterns without assuming one causes another.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X23, X24, X39

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

AC12

Managerial Execution Combination

Combined execution evidence

COACHING QUESTION

Explore a specific planning or execution question rather than purchasing a battery by default.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X04, X24, X56

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC11

Operational Reliability Combination

Combined operational evidence

COACHING QUESTION

Relevant only where the executive's development question genuinely concerns the assessed work demands.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X08, X21, X63

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

AC01

Personal Development Combination

Combined personal-development evidence

COACHING QUESTION

Choose a limited developmental question and explain what each component contributes.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X15, X24, X30

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC02

Personal Discovery Combination

PSN, RMA and CRA

COACHING QUESTION

Explore contribution, relationship needs and disagreement as complementary perspectives.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X17, X25, X48

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

ASSESSMENT-TO-COACHING APPLICATION

AC13

Strategic Leadership Ability Combination

Combined reasoning evidence

COACHING QUESTION

Explore specific strategic reasoning demands, not a single verdict about leadership quality.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X21, X35, X37

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

AC04

Team Combination

Combined team evidence

COACHING QUESTION

Requires a separate team purpose, consent and facilitation design; not a proxy rating of the individual leader.

DEBRIEF PROMPTS

Why is each component needed?

What do the results agree or disagree about?

What real work evidence will test the interpretation?

ACTIVITY ROUTE

X25, X56, X58

NEXT WORK EVIDENCE

Select one supported hypothesis and one workplace action; do not add unlike scores together.

INTERPRETATION LIMIT

Confirm the current component list, technical manuals and permissions. No composite psychological verdict or automatic employment decision.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T25

TOOL

Readiness and expectations check

Test fit, motivation, capacity and misconceptions.

Practical guide

Working form

Worked example

EXCEL TAB T25 Readiness and expectations

TIME 25-40 minutes before goals are agreed; revisit after a major context, capacity or risk change. | **OWNER** Coach

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Ask why coaching is proposed now and distinguish the coachee's reasons from the sponsor's.
- 02** Test genuine choice, ownership and expectations, correcting misconceptions about advice, therapy or performance control.
- 03** Assess practical capacity: time, energy, opportunity to practise and manager or system support.

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

Equating manager nomination with participant ownership and readiness; Ignoring workload, energy or opportunity because coaching sessions fit the calendar; Using coaching to bypass transparency about a grievance or formal performance process.

CONTINUE THE METHOD

- 04** Identify active conflict, health, conduct, legal or safeguarding issues and agree any access adjustments.
- 05** Make and explain a proceed, adapt, defer or refer decision, including the next review point.

BOUNDARY & CAUTION

Do not use readiness language to blame, exclude or coerce someone whose real barrier is workload, access, power or an unresolved organisational process.

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.127



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T25

TOOL

Readiness and expectations check

Test fit, motivation, capacity and misconceptions.

Practical guide

Working form

Worked example

EXCEL TAB T25 Readiness and expectations

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

Reason now Why coaching and why now	
Ownership Whose idea and level of choice	
Expectation What coaching is expected to do	
Capacity Time, energy and opportunity	
Concern Risk, conflict or active process	
Access Adjustments or preferences	
Fit decision Proceed, adapt, defer or refer	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T25

TOOL

Readiness and expectations check

Test fit, motivation, capacity and misconceptions.

Practical guide

Working form

Worked example

EXCEL TAB T25 Readiness and expectations

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Reason now Why coaching and why now	Director M-07 faces two contested MetroLink East gates before year-end and wants earlier practice with challenge.
Ownership Whose idea and level of choice	The line manager suggested coaching, but the director chose to participate and selected the final development focus.
Expectation What coaching is expected to do	Use coaching to test assumptions and rehearse stakeholder conversations, not obtain technical answers or sponsor approval.
Capacity Time, energy and opportunity	Ninety minutes monthly is protected; live gate work provides experiments, though September shutdown planning may constrain energy.
Concern Risk, conflict or active process	A current commercial disagreement requires clear boundaries so coaching cannot become evidence in contract or performance 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

T26

TOOL

Person-role-system scan

Prevent personal development from ignoring role and system causes.

Practical guide

Working form

Worked example

EXCEL TAB T26 Personrolesystem scan

TIME 45-60 minutes early in coaching, then 15-20 minutes when progress stalls or the context shifts. | **OWNER** Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Describe the challenge first at person level: strengths, skills, beliefs, wellbeing and agency.
- 02** Examine role clarity, authority, workload, interfaces and the relationships shaping the pattern.
- 03** Map structural, cultural, incentive, resource and wider-context forces without treating assumptions as facts.

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** Separate what the coachee controls, can influence or can only surface to an accountable owner.
- 05** Choose one personal experiment and one organisational escalation or support action where indicated.

BOUNDARY & CAUTION

Do not convert systemic causes into a personal deficit or imply that coaching can fix authority, resource, workload or conduct problems it does not control.

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.130

T26 Person-role-system scan

TOOL

Prevent personal development from ignoring role and system causes.

Guide

Worksheet

Example

LIVE WORKSHEET



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T26 Person-role-system scan

TOOL

Prevent personal development from ignoring role and system causes.

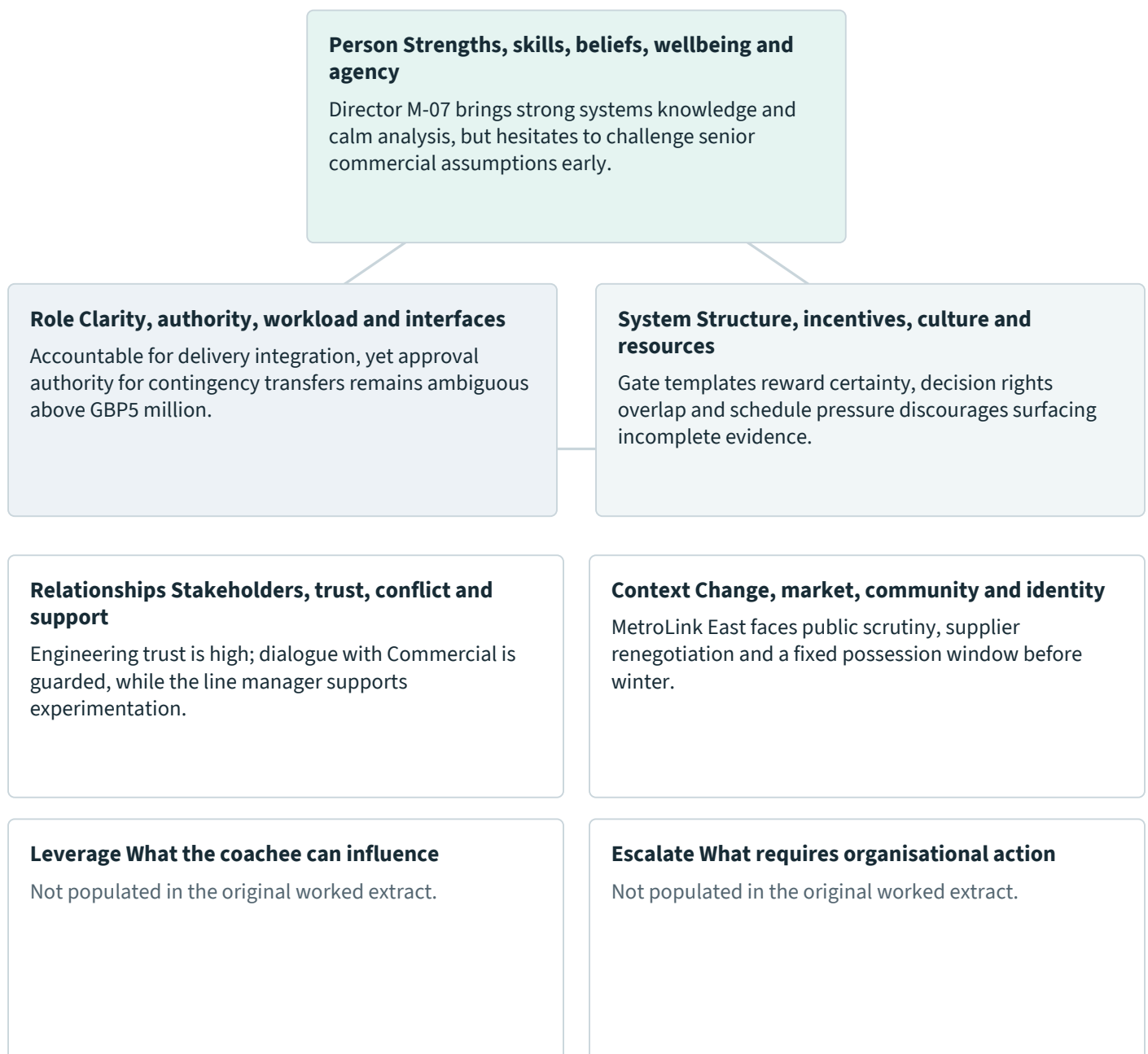
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

Retained fictional source extract; unpopulated fields are identified.



Basis: H01 / H04 | H04 source p.130

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T27

TOOL

Strengths evidence map

Ground strengths in situations, outcomes and feedback.

Practical guide

Working form

Worked example

EXCEL TAB T27 Strengths evidence map

TIME 30-45 minutes in discovery, with a 10-minute update after significant application or feedback. | **OWNER** Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Name one specific strength rather than a broad personality label.
- 02** Capture a situation-behaviour-result example and corroborating feedback or work evidence.
- 03** Note whether using the strength creates energy, meaning or depletion for the coachee.

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

Naming a flattering trait without a specific situation, behaviour and result; Ignoring how a valued strength becomes limiting when overused or mistimed; Prescribing the same strength in every context instead of testing fit.

CONTINUE THE METHOD

- 04** Identify contexts where the strength is valued, constrained or risky when overused.
- 05** Design a goal-relevant application and define what effective, not excessive, use will look like.

BOUNDARY & CAUTION

Do not use uncorroborated labels or strengths positivity to bypass capability gaps, overuse risks, harm or difficult contextual evidence.

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.133



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T27

TOOL

Strengths evidence map

Ground strengths in situations, outcomes and feedback.

Practical guide

Working form

Worked example

EXCEL TAB T27 Strengths evidence map

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

Strength Specific capability or quality	
Evidence Situation, behaviour and result	
Energy Effect on energy and meaning	
Overuse Risk when overapplied	
Context Where it is valued or constrained	
Application How it supports the goal	

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



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T27

TOOL

Strengths evidence map

Ground strengths in situations, outcomes and feedback.

Practical guide

Working form

Worked example

EXCEL TAB T27 Strengths evidence map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Strength Specific capability or quality	Translates complex engineering dependencies into concise sequences that non-technical stakeholders can understand and interrogate.
Evidence Situation, behaviour and result	At the utilities review, M-07 visualised three dependencies, enabling agreement on a resequenced works package.
Energy Effect on energy and meaning	Complex integration work is absorbing and meaningful; repetitive sponsor reassurance drains attention before key decisions.
Overuse Risk when overapplied	Detailed analysis can delay an early directional conversation and leave commercial colleagues feeling presented with conclusions.
Context Where it is valued or constrained	Most valuable before design freezes; constrained when executives need a timely recommendation under incomplete 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

T28

TOOL

Critical moments analysis

Identify the situations in which behaviour matters most.

Practical guide

Working form

Worked example

EXCEL TAB T28 Critical moments analysis

TIME 35-50 minutes per priority moment; review after the next two or three real occurrences. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Select a recurring meeting, decision, conflict or transition where the target behaviour matters.
- 02** Reconstruct its trigger, observable current response and consequences for self, others and work.
- 03** Specify the desired response in language that an observer could recognise.

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

Analysing a general story rather than one observable, consequential work moment; Writing the desired response as communicate better or show more confidence; Ignoring how the current response affects other people and delivery outcomes.

CONTINUE THE METHOD

- 04** Diagnose whether the main constraint is skill, belief, emotion, power or the surrounding system.
- 05** Plan the next in-context test and the evidence to collect immediately afterwards.

BOUNDARY & CAUTION

Do not generalise from a single reconstructed incident when memory, role power or missing stakeholder evidence could materially change the pattern.

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.136



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T28

TOOL

Critical moments analysis

Identify the situations in which behaviour matters most.

Practical guide

Working form

Worked example

EXCEL TAB T28 Critical moments analysis

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

Moment Meeting, decision, conflict or transition	
Trigger What starts the pattern	
Current response Observable behaviour	
Consequence For self, others and work	
Desired response Specific alternative	
Constraint Skill, belief, emotion, power or system	
Evidence What success would look like	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T28

TOOL

Critical moments analysis

Identify the situations in which behaviour matters most.

Practical guide

Working form

Worked example

EXCEL TAB T28 Critical moments analysis

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Moment Meeting, decision, conflict or transition	Monthly capital-gate meeting when Commercial challenges the proposed contingency before the investment recommendation is finalised.
Trigger What starts the pattern	A senior sponsor asks for immediate cost certainty despite unresolved ground-condition evidence.
Current response Observable behaviour	M-07 adds technical detail, answers every objection and postpones naming the underlying decision-right conflict.
Consequence For self, others and work	The room debates estimates, dissent goes underground and the recommendation returns for costly rework.
Desired response Specific alternative	State uncertainty, compare two options, invite the commercial concern and agree owner, threshold and decision date.

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

T29

TOOL

Stakeholder perspective plan

Gather useful stakeholder evidence without turning coaching into surveillance.

Practical guide

Working form

Worked example

EXCEL TAB T29 Stakeholder perspective pla

TIME 30-45 minutes to plan, 15-30 minutes per stakeholder, and 30 minutes to interpret the combined evidence. | **OWNER** Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Choose only stakeholders whose perspective is relevant to the agreed behavioural question.
- 02** Write one narrow, neutral inquiry and select interview, pulse, observation or feedback as the method.
- 03** Agree who knows the purpose, what will be attributable and how consent can be withdrawn.

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** Collect responses consistently, noting role, power, opportunity to observe and other bias sources.
- 05** Triangulate themes with context and convert insight into a coachee-owned experiment, not a verdict.

BOUNDARY & CAUTION

Do not gather stakeholder views secretly, solicit broad character judgements or repurpose coaching feedback for appraisal or surveillance.

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.139



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T29

TOOL

Stakeholder perspective plan

Gather useful stakeholder evidence without turning coaching into surveillance.

Practical guide

Working form

Worked example

EXCEL TAB T29 Stakeholder perspective pla

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

Stakeholder Whose perspective matters	
Question Narrow behavioural inquiry	
Method Interview, pulse, observation or feedback	
Consent Who knows what	
Interpretation Bias and context	
Use How insight will inform action	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T29

TOOL

Stakeholder perspective plan

Gather useful stakeholder evidence without turning coaching into surveillance.

Practical guide

Working form

Worked example

EXCEL TAB T29 Stakeholder perspective pla

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Stakeholder Whose perspective matters	Commercial Director, whose support is essential for contingency recommendations and timely supplier negotiations.
Question Narrow behavioural inquiry	When I frame a contested gate decision, which observable behaviour helps or hinders your constructive challenge?
Method Interview, pulse, observation or feedback	Fifteen-minute structured interview conducted by the evaluator before coaching and repeated at ninety-day follow-up.
Consent Who knows what	M-07 approves the stakeholder and question; the respondent knows themes inform coaching but comments are not verbatim reports.
Interpretation Bias and context	One influential view is a hypothesis shaped by commercial incentives, recent conflict and recall, not objective truth.

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

T30

TOOL

Psychometric use check

Use assessments responsibly within their evidence and purpose limits.

Practical guide

Working form

Worked example

EXCEL TAB T30 Psychometric use check

TIME 45-75 minutes for selection review, plus standard administration and a 60-90 minute qualified feedback session. | **OWNER** Qualified practitioner

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Define the decision need and confirm that an assessment would add information unavailable by simpler means.
- 02** Match the intended construct to evidence on reliability, validity, norms, language and target population.
- 03** Confirm qualified administration, standard conditions and reasonable access adjustments.

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 consent, data access, retention and the explicit boundary against unsupported selection or diagnosis.
- 05** Interpret scores with uncertainty and alternative hypotheses, then debrief them alongside contextual evidence.

BOUNDARY & CAUTION

Do not use an instrument outside its validated purpose, population, qualified-use conditions or authority for selection, diagnosis or high-stakes decisions.

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.142



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T30

TOOL

Psychometric use check

Use assessments responsibly within their evidence and purpose limits.

Practical guide

Working form

Worked example

EXCEL TAB T30 Psychometric use check

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

Due-diligence criterion	Evidence / source	Pass / adapt / fail	Decision / control
Decision need is legitimate			
Construct matches need			
Reliability evidence			
Validity for intended use			
Norm/population relevance			
Language and accessibility			
Qualified administration			
Interpretation and uncertainty			
Data/consent/retention			
Employment-use boundary			

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T30

TOOL

Psychometric use check

Use assessments responsibly within their evidence and purpose limits.

Practical guide

Working form

Worked example

EXCEL TAB T30 Psychometric use check

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Decision need Why an assessment is considered	Explore pressure-related decision habits only if an assessment adds insight beyond behavioural evidence already available.
Construct What is measured	The proposed vendor profile claims to measure decisiveness, challenge orientation and tolerance of ambiguity.
Evidence Reliability, validity and norms for intended use	The vendor supplied testimonials but no adequate reliability, predictive-validity or adverse-impact evidence for this decision.
Population Language and relevance	No relevant norms exist for UK infrastructure project directors or the programme's multilingual participant group.
Administration Standardisation and access	Do not administer; use consented behavioural interviews and critical-moment analysis, then revisit if qualified evidence emerges.

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

T31

TOOL

Goal architecture canvas

Create a goal that connects meaning, behaviour, evidence and context.

Practical guide

Working form

Worked example

EXCEL TAB T31 Goal architecture canvas

TIME 45-60 minutes after discovery, with 15-minute reviews at agreed milestones. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** State the desired change in the coachee's own words and explore its personal meaning.
- 02** Connect it to legitimate work priorities without substituting the sponsor's agenda.
- 03** Translate the outcome into observable target behaviour in named critical situations.

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

Writing only a business outcome without a behaviour the coachee can practise; Allowing sponsor wording to replace the coachee's meaning and ownership; Omitting the situations, evidence and constraints that make the goal testable.

CONTINUE THE METHOD

- 04** Choose proportionate self, stakeholder and work evidence, plus the support needed to practise.
- 05** Set the review date, ownership and rule for adapting the goal when evidence or context changes.

BOUNDARY & CAUTION

Do not finalise an elegant individual goal when the required opportunity, authority, support or organisational ownership is absent.

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.145



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T31

TOOL

Goal architecture canvas

Create a goal that connects meaning, behaviour, evidence and context.

Practical guide

Working form

Worked example

EXCEL TAB T31 Goal architecture canvas

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

Desired change Outcome in the coachee's words	
Meaning Why it matters	
Strategic relevance Connection to work	
Target behaviour What will be done differently	
Situations Where behaviour must occur	
Evidence Self, stakeholder and work indicators	
Support Opportunity and resources	
Review Date and adaptation rule	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T31

TOOL

Goal architecture canvas

Create a goal that connects meaning, behaviour, evidence and context.

Practical guide

Working form

Worked example

EXCEL TAB T31 Goal architecture canvas

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Desired change Outcome in the coachee's words	I make contested capital-gate recommendations clearer, earlier and easier for others to challenge constructively.
Meaning Why it matters	This protects delivery credibility, reduces avoidable rework and lets me lead uncertainty without pretending certainty.
Strategic relevance Connection to work	The goal supports Meridian's handover reliability priority and the pilot's defined decision-quality mechanism.
Target behaviour What will be done differently	State criteria, distinguish evidence from assumption, surface two options, invite dissent and confirm accountable ownership.
Situations Where behaviour must occur	MetroLink East investment gates, weekly commercial reviews and any escalation exceeding the agreed contingency threshold.

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

T32

TOOL

Baseline evidence record

Create a proportionate starting point for later comparison.

Practical guide

Working form

Worked example

EXCEL TAB T32 Baseline evidence record

TIME 30-60 minutes before intervention; data-quality review before comparison and whenever the measure changes. | **OWNER** Coach/evaluation lead

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Define the outcome and choose the least intrusive source and method capable of indicating it.
- 02** Record the baseline value, collection date, unit, population and any missingness or uncertainty.
- 03** Document concurrent events and conditions that could distort later comparison.

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

Constructing a retrospective baseline after participants already changed their behaviour; Changing the measure or scoring rule midway without documenting the effect; Presenting a small pre-post movement as proof that coaching caused it.

CONTINUE THE METHOD

- 04** Set a direction or threshold without implying that coaching alone will cause the change.
- 05** Restrict access, schedule the comparison and preserve the same measure unless a change is documented.

BOUNDARY & CAUTION

Do not present a weak, shifting or inaccessible baseline as proof that coaching caused a later organisational outcome.

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.148



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T32

TOOL

Baseline evidence record

Create a proportionate starting point for later comparison.

Practical guide

Working form

Worked example

EXCEL TAB T32 Baseline evidence record

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

Outcome Defined indicator	
Measure Source and method	
Value Baseline and date	
Quality Completeness and limitations	
Context Concurrent events	
Target Direction or threshold	
Access Who may see the data	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T32

TOOL

Baseline evidence record

Create a proportionate starting point for later comparison.

Practical guide

Working form

Worked example

EXCEL TAB T32 Baseline evidence record

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Outcome Defined indicator	Percentage of sampled capital-gate recommendations requiring avoidable reframing before a decision can be recorded.
Measure Source and method	Independent reviewer applies the agreed five-item quality rubric to consecutive eligible gate papers and minutes.
Value Baseline and date	Baseline is 58 percent, seven of twelve sampled recommendations, measured on 31 August 2026.
Quality Completeness and limitations	Small sample and moderate reviewer judgement limit precision; two reviewers calibrated on four papers.
Context Concurrent events	A new gate template and parallel authority redesign begin during the pilot, preventing simple attribution to coaching.

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

T33

TOOL

Goal attainment scale

Define meaningful levels of progress before action.

Practical guide

Working form

Worked example

EXCEL TAB T33 Goal attainment scale

TIME 30-45 minutes to anchor one goal, then 15-20 minutes at the stated review date. | **OWNER** Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Write one bounded goal and describe the observable expected outcome at level 0.
- 02** Anchor -1 and -2 as progressively less progress using the same evidence dimension.
- 03** Anchor +1 and +2 as credible additional progress, not unrelated stretch outcomes.

CONTINUE THE METHOD

- 04** Test that all five levels are distinct, ordered and recognisable by the agreed evidence source.
- 05** Set the review date and rate against evidence before discussing why the result occurred.

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

Using vague anchors that different reviewers cannot recognise consistently; Setting the expected outcome so low that ordinary activity counts as success; Rewriting anchors after results are known to create a favourable score.

BOUNDARY & CAUTION

Do not use Goal Attainment Scaling with vague, overlapping anchors or change the scale after seeing the result to manufacture progress.

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.151



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T33

TOOL

Goal attainment scale

Define meaningful levels of progress before action.

Practical guide

Working form

Worked example

EXCEL TAB T33 Goal attainment scale

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

Level	Behaviourally specific outcome	Evidence source
+2 Much more than expected		
+1 Somewhat more than expected		
0 Expected outcome		
-1 Somewhat less than expected		
-2 Much less than expected		

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T33

TOOL

Goal attainment scale

Define meaningful levels of progress before action.

Practical guide

Working form

Worked example

EXCEL TAB T33 Goal attainment scale

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal Single defined goal	Frame and secure constructive decisions at M-07's two scheduled MetroLink East capital gates.
-2 Much less than expected	Neither gate reaches decision; criteria remain implicit and both recommendations return for major reframing.
-1 Somewhat less than expected	One gate reaches decision, but dissent is invited late or ownership and escalation thresholds remain unclear.
0 Expected outcome	Both gates record criteria, alternatives, invited challenge, an accountable owner and agreed escalation threshold.
+1 Somewhat more than expected	Expected standard is met, and stakeholders independently cite earlier issue surfacing with no avoidable reframing.

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

T34

TOOL

Barrier and leverage map

Choose the highest-leverage constraints to address.

Practical guide

Working form

Worked example

EXCEL TAB T34 Barrier and leverage map

TIME 35-50 minutes, followed by a 15-minute evidence review after the first leverage experiment. | **OWNER** Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** List forces maintaining the current pattern and place each at person, relationship, role, system or context level.
- 02** Classify each barrier as within control, influence or concern and name the accountable owner.
- 03** Test the claimed barrier against examples, counterexamples and available organisational evidence.

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** Select the smallest ethical action likely to shift the barrier or reveal useful information.
- 05** Run the leverage experiment, review its evidence and escalate structural constraints to the right owner.

BOUNDARY & CAUTION

Do not ask the coachee to experiment around a barrier that requires formal authority, safeguarding, health, legal or organisational action.

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.154



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T34

TOOL

Barrier and leverage map

Choose the highest-leverage constraints to address.

Practical guide

Working form

Worked example

EXCEL TAB T34 Barrier and leverage map

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

Barrier Specific force maintaining the current pattern

Level Person, relationship, role, system or context

Control Control, influence or concern

Evidence How we know

Leverage Small action with useful information

Owner Coachee, manager, sponsor or organisation

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T34

TOOL

Barrier and leverage map

Choose the highest-leverage constraints to address.

Practical guide

Working form

Worked example

EXCEL TAB T34 Barrier and leverage map

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Barrier Specific force maintaining the current pattern	M-07 expects early challenge to be read as insufficient control, so waits for near-complete evidence.
Level Person, relationship, role, system or context	Person belief interacts with sponsor expectations and an organisational template that rewards confident single recommendations.
Control Control, influence or concern	M-07 controls framing, can influence sponsor dialogue, but cannot alone change formal investment authority.
Evidence How we know	Three gate records show late alternatives; stakeholder interviews describe strong analysis but delayed surfacing of uncertainty.
Leverage Small action with useful information	Open the next commercial review with decision criteria and two unresolved assumptions, then ask what needs early escalation.

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

T35

TOOL

Learning preference and access profile

Adapt coaching without stereotyping or unnecessary diagnosis.

Practical guide

Working form

Worked example

EXCEL TAB T35 Learning preference and acc

TIME 25-40 minutes during early contracting; check effectiveness after two sessions and whenever needs or delivery mode change. | OWNER Coach + coachee

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Ask how verbal, visual, written, movement or blended formats support the individual's processing.
- 02** Agree pace, reflection time, question load, language, directness and feedback preferences.
- 03** Identify sensory, privacy, technology, scheduling, energy and caring constraints.

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

Treating a preferred format as a fixed and scientifically proven learning style; Collecting diagnosis or identity details when functional access needs are enough; Sharing the access profile beyond those arranging the agreed adjustments.

CONTINUE THE METHOD

- 04** Convert stated needs into specific delivery adjustments without requesting unnecessary diagnosis.
- 05** Try the adjustments, ask what actually helped and revise the profile from experience.

BOUNDARY & CAUTION

Do not label people with fixed 'learning styles', demand diagnostic disclosure or assume a stated preference is automatically an effective adjustment.

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.157



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T35

TOOL

Learning preference and access profile

Adapt coaching without stereotyping or unnecessary diagnosis.

Practical guide

Working form

Worked example

EXCEL TAB T35 Learning preference and acc

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

Format Verbal, visual, written, movement or blend	
Processing Reflection time, pace and question load	
Communication Language, directness and feedback	
Environment Sensory, privacy and technology needs	
Schedule Time zone, energy and caring/work constraints	
Adjustment Agreed practical changes	
Review What works and what to change	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T35

TOOL

Learning preference and access profile

Adapt coaching without stereotyping or unnecessary diagnosis.

Practical guide

Working form

Worked example

EXCEL TAB T35 Learning preference and acc

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Format Verbal, visual, written, movement or blend	Blend spoken exploration with a one-page visual decision map that M-07 can annotate during reflection.
Processing Reflection time, pace and question load	Send no surprise pre-work; allow ten silent seconds after complex questions and summarise choices before action planning.
Communication Language, directness and feedback	Use direct, concrete language; distinguish observation from inference and avoid unexplained coaching or psychometric terminology.
Environment Sensory, privacy and technology needs	Captioned video, private room, noise-cancelling headset and keyboard-accessible documents are required for reliable participation.
Schedule Time zone, energy and caring/work constraints	Early-morning sessions suit site energy patterns; avoid possession-planning weeks and provide forty-eight-hour rescheduling flexibility.

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

T36

TOOL

Coaching formulation

Create a tentative, testable explanation of the development challenge.

Practical guide

Working form

Worked example

EXCEL TAB T36 Coaching formulation

TIME 45-60 minutes after discovery, plus 20-30 minutes in supervision when evidence, risk or the working hypothesis changes. | **OWNER** Coach

BRING Current contract and agreed purpose | Behavioural examples and work context | Only relevant assessment/feedback data with authorised access

RUN THE ACTIVITY

- 01** Restate the agreed goal and describe the recurring trigger-behaviour-consequence pattern with evidence.
- 02** Map strengths, support and other resources that could interrupt or replace the pattern.
- 03** Generate multiple person, relationship, role and system hypotheses about what maintains it.

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** Link each plausible hypothesis to a coaching experiment and note boundary or referral risks.
- 05** Define confirming and disconfirming evidence, then revise the formulation in supervision as learning emerges.

BOUNDARY & CAUTION

Do not treat a coaching formulation as a diagnosis or settled truth; it remains a provisional explanation to test and revise.

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.160



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T36

TOOL

Coaching formulation

Create a tentative, testable explanation of the development challenge.

Practical guide

Working form

Worked example

EXCEL TAB T36 Coaching formulation

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

Goal What change is sought	
Pattern Trigger-behaviour-consequence cycle	
Resources Strengths and support	
Maintainers Beliefs, habits, relationships and systems	
Hypotheses Multiple possible explanations	
Intervention Coaching moves and experiments	
Risk Boundary/referral considerations	
Test What evidence would confirm or disconfirm	

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

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

T36

TOOL

Coaching formulation

Create a tentative, testable explanation of the development challenge.

Practical guide

Working form

Worked example

EXCEL TAB T36 Coaching formulation

SOURCE WORKED EXTRACT / FICTIONAL MERIDIAN CASE

Record / prompt	Illustrative entry
Goal What change is sought	Frame contested gate decisions early enough for genuine challenge while preserving delivery ownership and credibility.
Pattern Trigger-behaviour-consequence cycle	Sponsor requests certainty; M-07 adds detail, withholds alternatives, receives late objections and must rework the recommendation.
Resources Strengths and support	Systems expertise, calm presence, trusted engineering relationships, supportive manager and two imminent gates for practice.
Maintainers Beliefs, habits, relationships and systems	Fear of appearing unprepared, guarded commercial trust, ambiguous contingency authority and templates favouring one recommendation.
Hypotheses Multiple possible explanations	The pattern may reflect confidence, learned sponsor expectations, role ambiguity or insufficient rehearsal; evidence will test each.

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

X15

ACTIVITY

Leadership lifeline

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Practical guide

Working form

Worked example

EXCEL TAB X15 Leadership lifeline

TIME 60 minutes

BRING Blank timeline | Five to eight work events chosen by the coachee | Permission to omit personal or distressing experiences

RUN THE ACTIVITY

- 01** Invite the coachee to choose a bounded work period and mark events that changed how they lead. Events may be positive, ordinary or difficult; disclosure is optional.
- 02** For each event, ask what happened, what action they took, who helped and what they learned. Keep the event separate from the lesson subsequently attached to it.
- 03** Look for recurring patterns in decisions, relationships and responses to uncertainty. Ask for a counterexample before naming any pattern as established.

CONTINUE THE METHOD

- 04** Explore whether an old lesson remains useful in the current role. A rule that once protected quality may now encourage unnecessary control.
- 05** Choose one lesson to retain and one assumption to test. Agree a low-risk, work-based experiment rather than seeking a dramatic reinterpretation of the person's life.
- 06** Close by checking how the activity has affected the coachee and whether any material should not be retained. Summarise a practical implication, not a personality story.

QUESTIONS TO OPEN THINKING

Which work experience still influences how you lead?

Where has that lesson helped, and where has it become too broad?

What would you need to see to revise it?

BOUNDARY & CAUTION

This is not trauma processing. Stop or change the activity if it moves beyond the coaching remit, and use appropriate qualified support when needed.

BETWEEN SESSIONS / HAND-OFF

Notice when the old lesson appears in a current decision. Record a supporting and a contrary example before the next session.

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

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X15 Leadership lifeline

ACTIVITY

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Guide

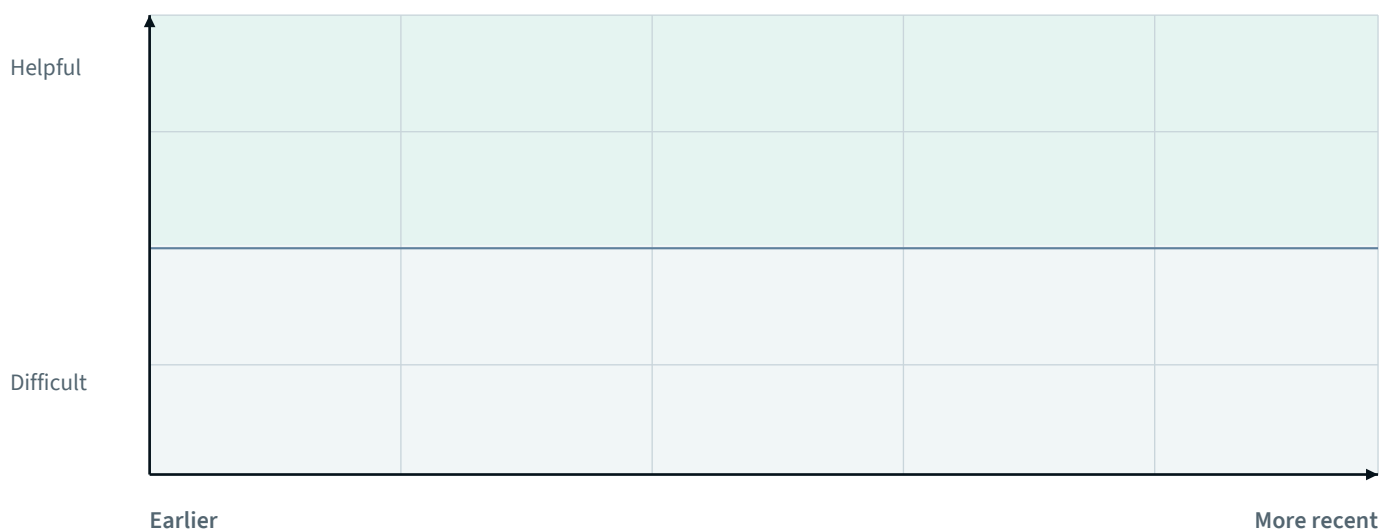
Worksheet

Example

LIVE WORKSHEET

LEADERSHIP LIFELINE PLOT

Work events that shaped my leadership



Mark selected events, connect them and label what you learned. You may omit any event.

01 Events selected

02 Action in the difficult event

03 Lesson formed

04 Counterexample

05 Revised hypothesis

06 Workplace test

Basis: H01 / H04 | Original executive application

X15 Leadership lifeline

ACTIVITY

Identify recurring learning, strengths and assumptions across the executive's work history without turning biography into diagnosis.

Guide

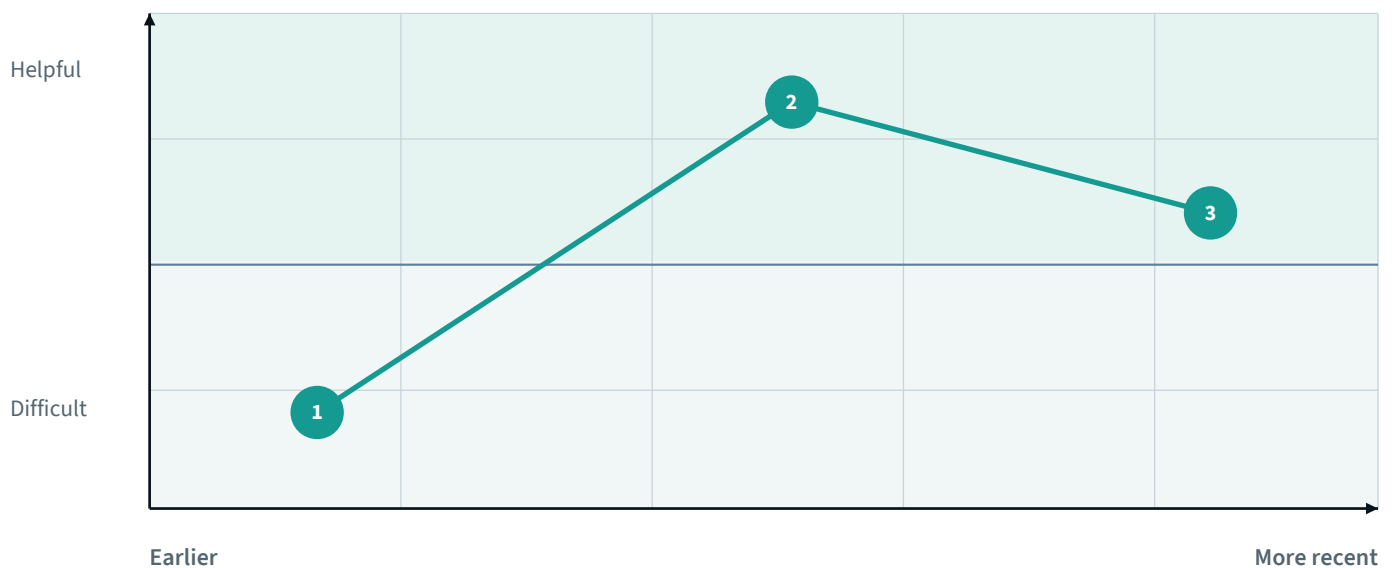
Worksheet

Example

FICTIONAL WORKED EXAMPLE

LEADERSHIP LIFELINE PLOT

Work events that shaped my leadership



1 Unclear handover

2 Successful joint review

3 Move to director

Event sequence from the source example; plotted heights are illustrative, not ratings.

01 Events selected

A failed handover, a successful joint review and the move from specialist to project director.

02 Action in the difficult event

M-07 took over a draft to prevent a missed gate after an unclear handover.

03 Lesson formed

If I do not inspect every detail, important gaps will be missed.

04 Counterexample

A later review succeeded when ownership and evidence checkpoints were agreed in advance.

05 Revised hypothesis

Clearer agreements may protect quality without requiring M-07 to inspect every detail.

06 Workplace test

Delegate one recommendation with a visible evidence checklist and review only at the agreed checkpoint.

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X16

ACTIVITY

Best-work episode review

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

Practical guide

Working form

Worked example

EXCEL TAB X16 Bestwork episode review

TIME 45 minutes

BRING Two coachee-selected successful work episodes | Optional consented feedback from one colleague | Evidence of action and outcome

RUN THE ACTIVITY

- 01** Ask for a specific episode in which the coachee contributed well, not an adjective such as resilient. Establish the situation, challenge and actual action.
- 02** Explore what the person did, how others contributed and which conditions made it possible. Avoid crediting the executive for the entire team outcome.
- 03** Repeat with a second episode. Look for a recurring capability while preserving differences in context and evidence.

CONTINUE THE METHOD

- 04** Ask where the same capability may be underused or overused. A strength is not universally helpful at maximum intensity.
- 05** Choose a current task where a deliberate application could help. Define a behaviour, necessary support and one risk to monitor.
- 06** Capture a short strengths hypothesis and an experiment. Identify what further feedback would confirm, refine or contradict it.

QUESTIONS TO OPEN THINKING

- What did you actually do that made a difference?**
- What did the context and other people contribute?**
- Where could the same strength be too much?**

BOUNDARY & CAUTION

This is an original episode-review exercise. It is not the licensed Reflected Best Self Exercise and does not reproduce its materials or scoring.

BETWEEN SESSIONS / HAND-OFF

Ask one colleague for a concrete example of your useful contribution, with permission to discuss it in coaching.

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

BASIS H01 / R22 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X16 Best-work episode review

ACTIVITY

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

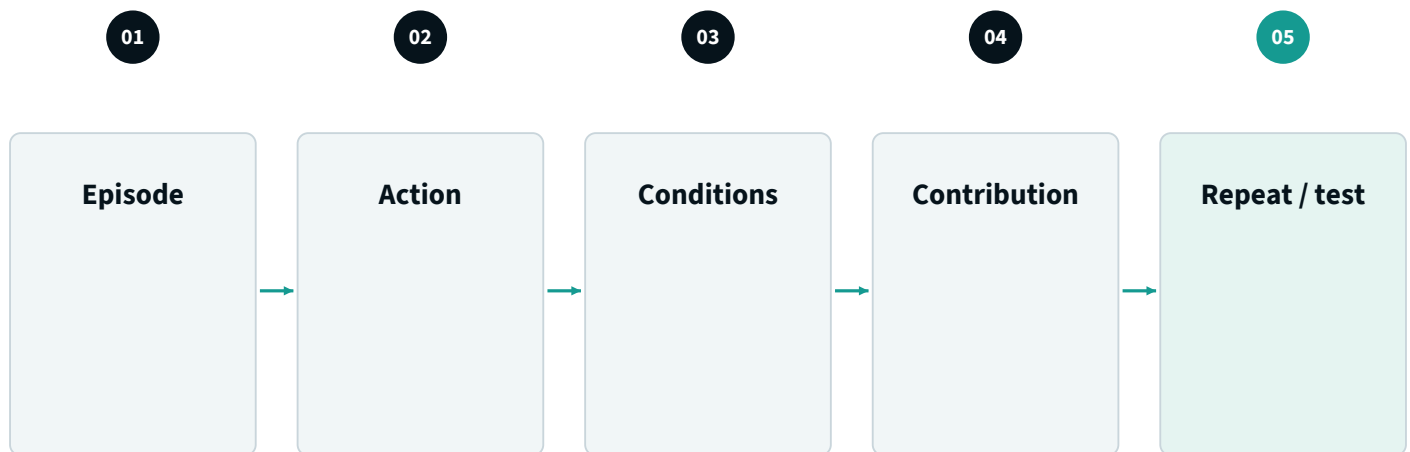
Guide

Worksheet

Example

LIVE WORKSHEET

BEST-WORK RECONSTRUCTION



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Episode one

02 Episode two

03 Strength hypothesis

04 Enabling conditions

05 Overuse risk

06 Application

Basis: H01 / R22 | Original executive application

X16 Best-work episode review

ACTIVITY

Find capabilities and enabling conditions in real examples of effective contribution, then choose a deliberate application.

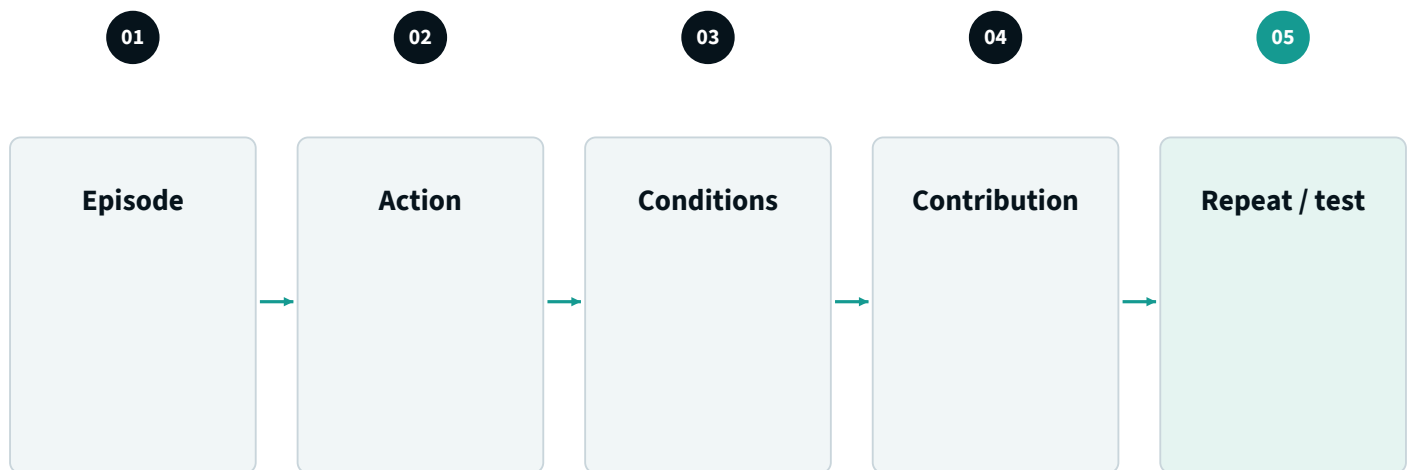
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

BEST-WORK RECONSTRUCTION



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Episode one

M-07 reframed a gate dispute as two decisions with different evidence needs.

02 Episode two

A cross-functional handover improved after M-07 asked each owner to name the condition for acceptance.

03 Strength hypothesis

Making complex decisions explicit and connecting perspectives.

04 Enabling conditions

Prepared evidence, time for challenge and specialists with clear authority.

05 Overuse risk

Over-structuring a simple decision can slow the team and crowd out its own problem-solving.

06 Application

Use a concise decision frame at the next complex gate, but let the team handle a routine handover with its existing process.

Basis: H01 / R22 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X17

ACTIVITY

Strengths dosage: underuse and overuse

Explore how the same strength can help or hinder depending on intensity, timing and context.

Practical guide

Working form

Worked example

EXCEL TAB X17 Strengths dosage underuse a

TIME 40 minutes

BRING An authorised strengths report if relevant, or episode-based strengths hypotheses | Two contrasting examples | A current task

RUN THE ACTIVITY

- 01** Select one strength the coachee recognises and define it behaviourally. A report label can start the discussion but cannot establish how others experience it.
- 02** Place three descriptions on a line: too little for this situation, useful range, and too much. Write observable signs rather than numerical personality ratings.
- 03** Reconstruct an episode at each end of the line. Ask what the person intended, what others experienced and what else may explain the result.

CONTINUE THE METHOD

- 04** Identify the cue that signals a need to change dosage, such as uncertainty, time pressure, task novelty or a colleague's request.
- 05** Choose a complementary behaviour rather than suppressing the strength. For analytical rigour, this might be asking what evidence is sufficient for the decision.
- 06** Plan one application and one feedback question. Review whether the adjustment helped the task and the relationship, not whether the profile became balanced.

QUESTIONS TO OPEN THINKING

When is this strength exactly what the work needs?

What would a colleague notice when it becomes too much?

What cue could help you adjust earlier?

BOUNDARY & CAUTION

Do not infer capability, character or risk from a relative preference score. Retain authorised assessment interpretation and avoid forced numerical balance.

BETWEEN SESSIONS / HAND-OFF

Record three uses of the strength this week and what the context required in each.

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

BASIS H01 / H05 / R04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X17 Strengths dosage: underuse and overuse

ACTIVITY

Explore how the same strength can help or hinder depending on intensity, timing and context.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Strength

02 Underuse

03 Useful range

04 Overuse

Amount used in this situation →

05 Adjustment cue

06 Experiment and feedback

Basis: H01 / H05 / R04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X17 Strengths dosage: underuse and overuse

ACTIVITY

Explore how the same strength can help or hinder depending on intensity, timing and context.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Strength

Analytical rigour, treated as a hypothesis from episodes and the coachee's report.

02 Underuse

Accepting a recommendation without asking about a material evidence gap.

03 Useful range

Clarifying the decision, testing the critical assumptions and identifying sufficient evidence.

04 Overuse

Reopening settled minor details after the accountable specialist has addressed the main risk.

Amount used in this situation

05 Adjustment cue

Ask whether the remaining uncertainty could change the decision or breach a required standard.

06 Experiment and feedback

At one gate, limit challenge to decision-relevant gaps; ask the engineering lead whether rigour remained useful and proportionate.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X18

ACTIVITY

Values trade-off cards

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Practical guide

Working form

Worked example

EXCEL TAB X18 Values tradeoff cards

TIME 45 minutes

BRING A genuine, bounded work dilemma | Six blank cards | Known legal, ethical and operational constraints

RUN THE ACTIVITY

- 01** Ask the coachee to write their own value words on cards, using recent work examples to explain each. Suggested words are invitations, not a prescribed set.
- 02** Select two or three values that pull in different directions in the current dilemma. Describe the competing claims without assuming one is more mature.
- 03** For each option, ask whose interests it protects, whose burden it increases and what constraint cannot be traded away.

CONTINUE THE METHOD

- 04** Generate a third option that preserves more of both values, where feasible. Do not use creative compromise to bypass a mandatory safety or ethical requirement.
- 05** Choose an option or identify the further evidence and authority needed. Record the trade-off honestly, including what the decision does not resolve.
- 06** Rehearse how the coachee will explain the reasoning to affected people and invite challenge. Set a date to review consequences.

QUESTIONS TO OPEN THINKING

What does each value protect here?

Whose cost is least visible?

What must not be traded away?

BOUNDARY & CAUTION

This is a reflective conversation, not a standardised values assessment. Do not rank people or infer their beliefs from group identity.

BETWEEN SESSIONS / HAND-OFF

Explain the trade-off to one relevant colleague and record what their perspective adds.

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

BASIS H01 / R21 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X18 Values trade-off cards

ACTIVITY

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Guide

Worksheet

Example

LIVE WORKSHEET

VALUES TRADE-OFF CARDS

01

Value / meaning

02

Behaviour it asks for

03

What it protects

04

What it can cost

05

Another value in tension

06

Choice under pressure

Cut or copy the cards; name values in the coachee's words and explore the real trade-off.

01 Dilemma

02 Values in tension

03 Non-negotiable boundary

04 Options considered

05 Choice and reason

06 Review

Basis: H01 / R21 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X18 Values trade-off cards

ACTIVITY

Make a difficult choice discussable by examining what competing values protect and what consequences each option creates.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

VALUES TRADE-OFF CARDS

01

Value / meaning

Stewardship

02

Behaviour it asks for

03

What it protects

04

What it can cost

05

Another value in tension

Transparency

06

Choice under pressure

Cut or copy the cards; name values in the coachee's words and explore the real trade-off.

01 Dilemma

Whether to move ahead with a gate when one non-critical evidence item is incomplete.

03 Non-negotiable boundary

Mandatory technical assurance must be complete; no value card can override it.

05 Choice and reason

Recommend the bounded step only after the technical authority confirms it is permissible, with the missing item and due date recorded.

02 Values in tension

Stewardship of delivery time and transparency about uncertainty.

04 Options considered

Delay everything; approve without comment; approve a bounded step with a named condition.

06 Review

Check whether the condition was closed and whether the team understood the limit of the decision.

Basis: H01 / R21 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X19

ACTIVITY

Energy and attention diary

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Practical guide

Working form

Worked example

EXCEL TAB X19 Energy and attention diary

TIME 20 minutes setup; five days of brief entries; 30-minute review
BRING A normal working week | Three optional daily check-in points | A private record without unnecessary personal details

RUN THE ACTIVITY

- 01** Agree the observation window and define what attention and energy mean to the coachee. Use simple personal labels such as low, workable and high, not clinical cut-offs.
- 02** Record the activity, context, interruptions and an optional energy description at a few planned times. Avoid constant monitoring or a burdensome minute-by-minute log.
- 03** At review, look for repeated associations between tasks, timing, environment and attention. Do not assume that a coincident pattern proves a cause.

CONTINUE THE METHOD

- 04** Separate avoidable work design problems from personal habits. Discuss meeting load, decision demands, travel, access needs and available recovery time.
- 05** Choose one modest change, such as protecting a planning interval or combining low-value administrative work. Obtain permission where changes affect others.
- 06** Compare the next week using the same simple observations and decide what to retain. Significant or persistent health concerns belong with qualified support.

QUESTIONS TO OPEN THINKING

When is your attention most usable for important work?

What is the work system asking of you at those times?

What small change can be tested without moving the burden to someone else?

BOUNDARY & CAUTION

No burnout, medical or mental-health score is produced. Participation in energy reflection is optional; persistent symptoms or significant distress require appropriate support.

BETWEEN SESSIONS / HAND-OFF

Keep the agreed brief diary, then identify one change in work design rather than a long list of self-improvement tasks.

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

BASIS H01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X19 Energy and attention diary

ACTIVITY

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Guide

Worksheet

Example

LIVE WORKSHEET

FIVE-DAY ATTENTION GRID

FIVE-DAY OBSERVATION GRID

	Day 1	Day 2	Day 3	Day 4	Day 5
First entry					
Middle entry					
Last entry					

L low W workable H high N/O not observed

Personal descriptions, not health thresholds. The source example supplies no daily ratings.

01 Observation window

02 Pattern noticed

03 Context

04 Alternative explanations

05 Experiment

06 Review evidence

Basis: H01 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X19 Energy and attention diary

ACTIVITY

Identify work patterns that support or drain attention and select a practical change without turning a diary into a health diagnosis.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

FIVE-DAY ATTENTION GRID

FIVE-DAY OBSERVATION GRID

	Day 1	Day 2	Day 3	Day 4	Day 5
First entry					
Middle entry					
Last entry					

L low W workable H high N/O not observed

Personal descriptions, not health thresholds. The source example supplies no daily ratings.

01 Observation window

Five normal working days, three brief entries per day.

03 Context

Unplanned updates arrived during the only intended preparation interval.

05 Experiment

Protect two 30-minute preparation blocks and agree a separate urgent-update route.

02 Pattern noticed

M-07's planning work repeatedly moved to the end of days containing six consecutive meetings.

04 Alternative explanations

Travel and a particularly demanding project week may also explain the pattern.

06 Review evidence

Compare whether the briefs were prepared earlier and whether the arrangement created delays for colleagues.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X20

ACTIVITY

Calendar versus contribution audit

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

Practical guide

Working form

Worked example

EXCEL TAB X20 Calendar versus contributio

TIME 45 minutes review plus 20 minutes preparation

BRING A recent calendar with sensitive details removed | Role mandate | An agreed set of work categories

RUN THE ACTIVITY

- 01** Agree a representative period and mark atypical events. Use only the detail required to understand work allocation, not private appointment content.
- 02** Create four to six role-relevant categories, such as strategic decisions, people development, stakeholder coordination and administration. Categories must be mutually clear enough for a useful discussion.
- 03** Estimate time in each category and identify unrecorded work. State whether figures are calendar bookings, actual time or estimates; do not present them as interchangeable.

QUESTIONS TO OPEN THINKING

What important contribution keeps being displaced?

Which meeting needs your authority, and which only needs a clear answer?

Who would carry the cost of your proposed change?

CONTINUE THE METHOD

- 04** Compare the pattern with the role mandate and current phase of work. There is no universal ideal percentage for executive time.
- 05** Select one activity to stop, delegate, shorten or redesign, and one contribution to protect. Explore who would inherit any displaced work and what support they need.
- 06** Agree a two-week trial and review both contribution and unintended burden. Use the diary as evidence for a conversation, not as a surveillance tool.

BOUNDARY & CAUTION

Do not impose a supposedly optimal time allocation or use private calendar data beyond the agreed purpose.

BETWEEN SESSIONS / HAND-OFF

Run the agreed calendar experiment and bring one example of a protected contribution and one unintended consequence.

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

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X20 Calendar versus contribution audit

ACTIVITY

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

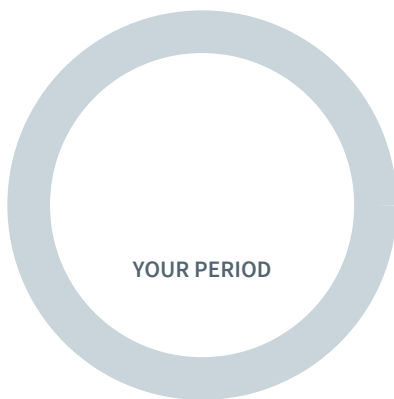
Guide

Worksheet

Example

LIVE WORKSHEET

BOOKED / ACTUAL BARS AND RING



BOOKED VS USED

Record hours on the same basis; plot against a common scale.

Booked hours

Used as intended

Complete the paired bars or ring only when both quantities and the denominator are known.

01 Period and basis

02 Categories

03 Finding

04 Context

05 Adjustment

06 Review

Basis: H01 / H04 | Original executive application

X20 Calendar versus contribution audit

ACTIVITY

Compare where the executive's time goes with the contribution their role requires, then negotiate one practical adjustment.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

BOOKED / ACTUAL BARS AND RING



PREPARATION HOURS / TWO WEEKS

Booked



Used as intended



0 4 hours

Retained fictional example: 2 of 4 booked preparation hours used as intended. Not a productivity norm.

01 Period and basis

Two weeks of booked calendar time, checked against M-07's recollection of unplanned work.

03 Finding

Preparation was booked for four hours but only two hours were used as intended.

05 Adjustment

Delegate routine status collection and protect two preparation blocks with an urgent-exception route.

02 Categories

Decision preparation, meetings, people development, stakeholder work and administration.

04 Context

Late evidence and unclear update channels caused repeated interruptions.

06 Review

Check actual preparation time, brief quality and the coordinator's workload after two weeks.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X21

ACTIVITY

Critical decision reconstruction

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

Practical guide

Working form

Worked example

EXCEL TAB X21 Critical decision reconstru

TIME 55 minutes

BRING One completed decision suitable for confidential discussion | Authorised decision records | A timeline rather than hindsight alone

RUN THE ACTIVITY

- 01** Choose a decision with a clear beginning and end. Establish what was known at the time, not only what became obvious afterwards.
- 02** Reconstruct the sequence: trigger, information available, alternatives, stakeholders consulted and decision authority. Mark gaps in memory or records.
- 03** Ask where an assumption entered the reasoning and what competing explanation was considered. Avoid equating an unfavourable outcome with a bad process.

CONTINUE THE METHOD

- 04** Explore pressure, incentives and relationships that shaped the choice. Identify what the executive could influence and what required wider action.
- 05** Identify one process strength and one change that would improve the next comparable decision. Keep the improvement proportionate to risk and time.
- 06** Create a prospective decision prompt and a review plan. Do not rehearse an actual protected assessment item or retroactively rewrite the original record.

QUESTIONS TO OPEN THINKING

What did you know then, rather than now?

Which alternative did you dismiss, and on what evidence?

What would you repeat even though the outcome was disappointing?

BOUNDARY & CAUTION

Do not infer stable judgement ability from one episode. Respect legal privilege, investigations and restrictions on confidential business information.

BETWEEN SESSIONS / HAND-OFF

Use the prospective prompt on a new decision and retain the prediction before the outcome is known.

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

BASIS H01 / H04 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X21 Critical decision reconstruction

ACTIVITY

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

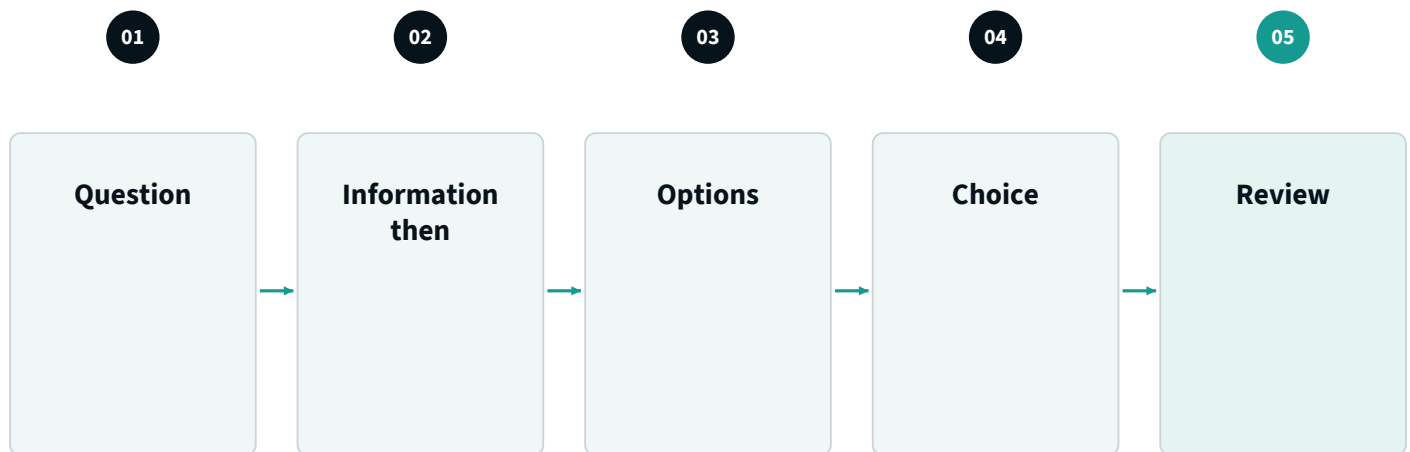
Guide

Worksheet

Example

LIVE WORKSHEET

DECISION RECONSTRUCTION TIMELINE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Decision

02 Known information

03 Assumption

04 Pressure and context

05 Learning

06 Next-decision prompt

Basis: H01 / H04 | Original executive application

X21 Critical decision reconstruction

ACTIVITY

Understand how a consequential executive decision was made, including information, assumptions, pressure and alternatives.

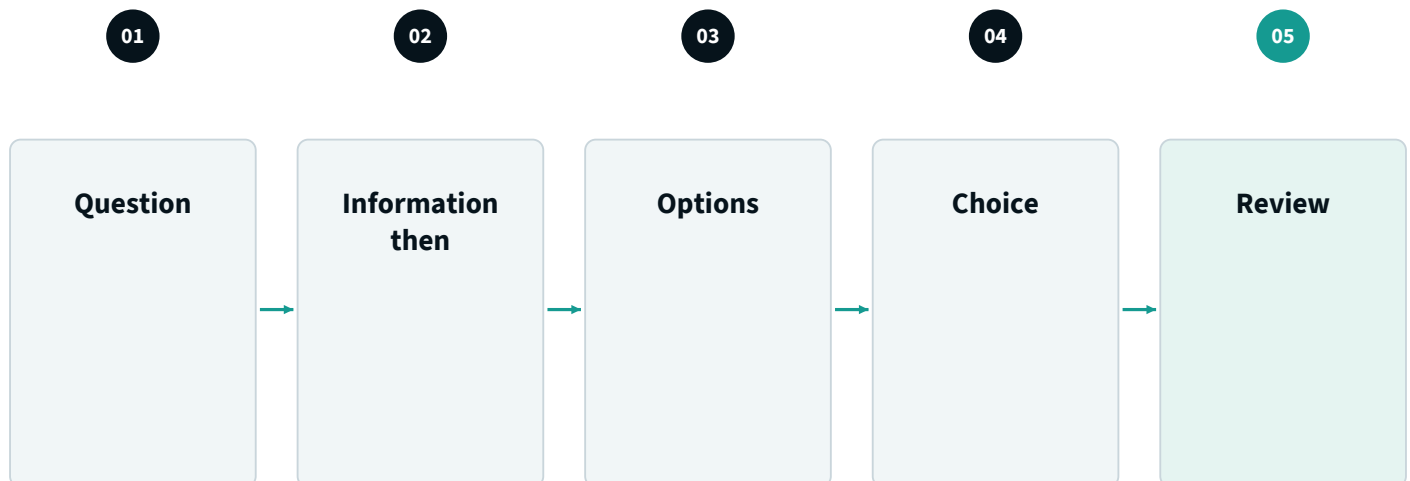
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

DECISION RECONSTRUCTION TIMELINE



Keep the evidence, interpretation, authority and chosen next step distinct.

01 Decision

M-07 recommended a conditional gate approval with incomplete supplier evidence.

03 Assumption

The supplier would respond within the agreed week, based on one verbal indication.

05 Learning

The conditional decision was legitimate, but the supplier assumption needed an explicit owner and contingency.

02 Known information

Technical assurance was complete; supplier confirmation was expected but not yet received.

04 Pressure and context

A delivery milestone was approaching and the escalation owner was unclear.

06 Next-decision prompt

What critical assumption remains, who owns its test, and what changes if it is wrong?

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X22

ACTIVITY

Stakeholder perception interviews

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

Practical guide

Working form

Worked example

EXCEL TAB X22 Stakeholder perception inte

TIME 60 minutes setup/debrief; 15 minutes per interview

BRING Agreed focus and consent wording | Balanced contributor selection | A clear reporting rule and secure note process

RUN THE ACTIVITY

- 01** Agree one behavioural question and the audience for the findings. Decide whether feedback is named or genuinely group-protected; do not promise anonymity that cannot be delivered.
- 02** Invite contributors without pressure. State the purpose, optional participation, how notes will be used and the route for concerns outside coaching.
- 03** Use the script: when have you seen the behaviour; what exactly happened; what impact followed; what would a useful alternative look like; what context should we understand?

CONTINUE THE METHOD

- 04** Ask for examples that support and contradict the initial concern. Do not solicit speculation about motives or collect allegations for informal handling.
- 05** Summarise each interview back, confirm permitted use and remove unnecessary identifying detail. Keep roles separate where their observation opportunities differ.
- 06** Debrief with the coachee using themes, exceptions and uncertainty. Choose a small practice and an appropriate follow-up question, not a verdict about the person.

QUESTIONS TO OPEN THINKING

What did you directly observe?

When has the opposite happened?

What would you like to experience differently in that same situation?

BOUNDARY & CAUTION

A coaching interview is not an investigation or a validated 360 instrument. Use formal routes for misconduct and qualified administration for standardised tests.

BETWEEN SESSIONS / HAND-OFF

Review the permitted summary, mark what fits and what needs context, then choose one observable practice to test.

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

BASIS H01 / H05 / R04 | Original executive application

X22 Stakeholder perception interviews

ACTIVITY

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

Guide

Worksheet

Example

LIVE WORKSHEET

PERCEPTION EVIDENCE INTERVIEW

01

Ask for observations

02

Retain different views

03

Check a hypothesis



WORDS / OBSERVATIONS

Keep quotations distinct from your interpretation.

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

01 Focus

02 Contributor plan

03 Questions

04 Evidence

05 Context

06 Action and follow-up

X22 Stakeholder perception interviews

ACTIVITY

Gather behaviourally specific feedback on one agreed coaching focus while protecting contributors and preserving differences between perspectives.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

PERCEPTION EVIDENCE INTERVIEW

01

Ask for observations

What mattered?

02

Retain different views

What happened?

03

Check a hypothesis

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 Focus

Does M-07 leave enough space for challenge before stating a recommendation?

02 Contributor plan

Three peers and a manager, with explicit named-summary consent; no false anonymity promise.

03 Questions

Ask for one recent episode, its impact, a counterexample and a useful alternative.

04 Evidence

Two peers describe early closure; one recalls a meeting where challenge was actively invited.

05 Context

The successful meeting had a clear question and evidence circulated in advance.

06 Action and follow-up

Trial a concerns-first opening and ask whether it changed the opportunity to contribute, without demanding favourable feedback.



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X23

ACTIVITY

Leadership 360 debrief

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

Practical guide

Working form

Worked example

EXCEL TAB X23 Leadership 360 debrief

TIME 75 minutes; optional second session

BRING Authorised report and practitioner manual | Confirmed rater-group privacy rules | Coachee's consent, current goal and readiness to discuss feedback

RUN THE ACTIVITY

- 01** Explain the report's purpose, scales, comparison groups and limitations before examining results. Confirm that no one will try to identify anonymous respondents and that self and manager perspectives remain distinct.
- 02** Ask the coachee what they notice first and how they want to work with it. Allow a pause; do not insist on immediate acceptance or explain emotion through a personality label.
- 03** Identify a supported strength, a difference between perspectives and an area with limited evidence. Read group sizes, missing data and observation opportunities before interpreting score gaps.

QUESTIONS TO OPEN THINKING

What is recognisable, surprising or unclear?

What might these groups see that others do not?

What one change would colleagues be able to notice?

CONTINUE THE METHOD

- 04** Explore concrete episodes that could explain the pattern, including counterexamples and system constraints. Distinguish intention, preference and experienced impact rather than declaring one view the truth.
- 05** Select one behaviour relevant to the agreed goal. Rehearse it and agree a real opportunity, an ethical feedback request and a reasonable review interval.
- 06** Summarise what the report supports and does not establish. Agree which action, if any, the coachee will share with stakeholders; retain raw results only within the authorised protocol.

BOUNDARY & CAUTION

Do not reverse-engineer raters, average unlike scales, treat a small group as representative or repeat the full instrument simply to manufacture improvement.

BETWEEN SESSIONS / HAND-OFF

Write a short, non-defensive statement of the practice you will try and the specific feedback you will request.

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

BASIS H01 / H05 / R04 / R05 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X23 Leadership 360 debrief

ACTIVITY

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

Guide

Worksheet

Example

LIVE WORKSHEET

01 Report boundary

02 Initial response



03 Evidence pattern

04 Context and counterexample

05 Experiment

06 Follow-up and sharing

Basis: H01 / H05 / R04 / R05 | Original executive application



01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X23 Leadership 360 debrief

ACTIVITY

Help an executive make sense of an authorised 360 report and convert a supported pattern into a bounded behavioural experiment.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

01 Report boundary

Authorised Leadership 360 Feedback; self and manager separate, peer and direct-report groups protected according to the manual.

02 Initial response

M-07 recognises strong decision ownership but is surprised by comments about limited challenge.



03 Evidence pattern

Some colleagues experience the recommendation as settled before discussion; observation opportunities differ.

04 Context and counterexample

A recent concerns-first meeting was experienced differently, suggesting the sequence may matter.

05 Experiment

At two reviews, ask for risks and alternatives before stating a preference, then summarise what changed in the recommendation.

06 Follow-up and sharing

M-07 shares the practice, not rater identities or raw group data, and requests specific feedback after two meetings.

Basis: H01 / H05 / R04 / R05 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X24

ACTIVITY

Assessment-to-experiment bridge

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

Practical guide

Working form

Worked example

EXCEL TAB X24 Assessmenttoexperiment brid

TIME 50 minutes

BRING An authorised assessment report | A clear coaching question | One comparable work episode

RUN THE ACTIVITY

- 01** State the question the assessment was selected to explore. Ask whether the report actually addresses that question and whether its language, population and purpose are appropriate.
- 02** Identify the evidence type: preference, judgement, reasoning, observed behaviour or simulation performance. Keep the type visible in the working record.
- 03** Choose one finding and ask the coachee for an example, a counterexample and any contextual explanation. A low relative preference is not a lack of ability.

QUESTIONS TO OPEN THINKING

What kind of evidence is this result?

Where does it fit your experience, and where does it not?

What would a useful experiment tell us that the report cannot?

CONTINUE THE METHOD

- 04** Write a conditional hypothesis: in this situation, this practice may help because of this reasoning. Do not infer hidden traits or future performance beyond the evidence.
- 05** Design a small workplace experiment with a clear behaviour, boundary, support and feedback source. Avoid practising live protected assessment items.
- 06** Review the report-to-action chain and agree when to revisit it. The next evidence should usually come from work, not automatically from another test.

BOUNDARY & CAUTION

Use qualified interpretation and authorised reports. No new score, benchmark or test item is created by this bridge.

BETWEEN SESSIONS / HAND-OFF

Complete one assessment-to-action record and check it with your practitioner before making a consequential inference.

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

BASIS H01 / H05 / R04 / R05 | Original executive application

X24 Assessment-to-experiment bridge

ACTIVITY

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

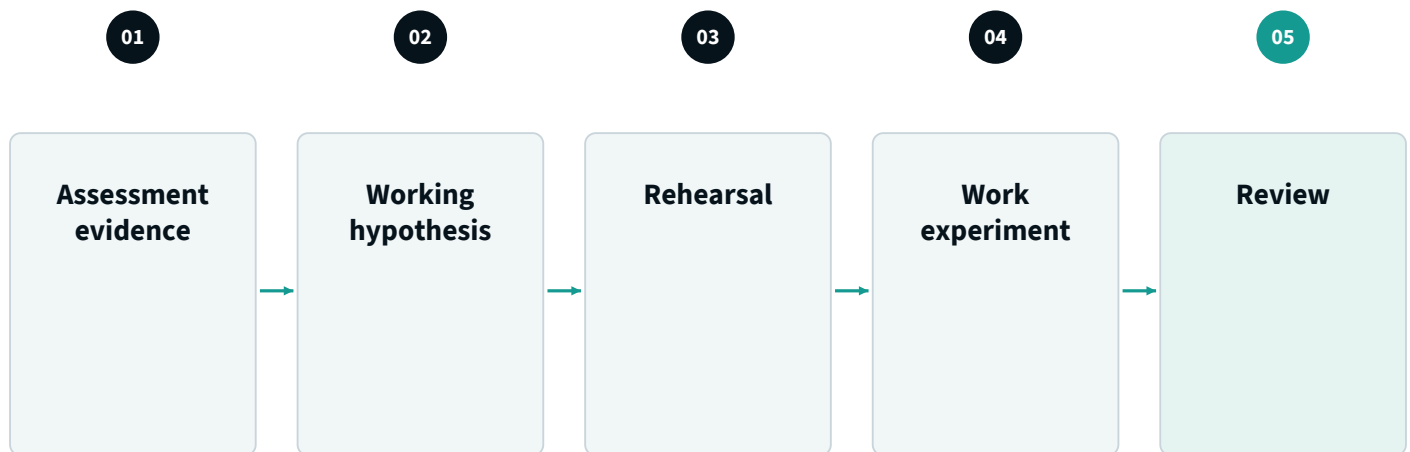
Guide

Worksheet

Example

LIVE WORKSHEET

EVIDENCE-TO-EXPERIMENT BRIDGE



A report becomes useful when it changes the next question or the next workplace experiment.

01 Question and tool

02 Evidence type

03 Finding and qualification

04 Work hypothesis

05 Experiment

06 Review evidence

Basis: H01 / H05 / R04 / R05 | Original executive application

X24 Assessment-to-experiment bridge

ACTIVITY

Turn one relevant assessment finding into a testable work hypothesis without treating the report as a psychological verdict.

Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

EVIDENCE-TO-EXPERIMENT BRIDGE



A report becomes useful when it changes the next question or the next workplace experiment.

01 Question and tool

Use Leadership Preference Profile to explore where M-07 naturally directs attention.

03 Finding and qualification

Development receives less emphasis than Direction; this does not prove poor people leadership.

05 Experiment

Ask the specialist to explain options and rationale before M-07 offers a solution.

02 Evidence type

Relative leadership preference across the published contribution landscape, not absolute competence.

04 Work hypothesis

A deliberate delegation checkpoint may increase attention to developing another person's judgement.

06 Review evidence

Observe whether the specialist retained ownership and whether the decision met the required standard; do not seek an artificially balanced profile.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X25

ACTIVITY

Relationship system map

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

Practical guide

Working form

Worked example

EXCEL TAB X25 Relationship system map

TIME 50 minutes

BRING One leadership challenge | A blank map | Roles instead of personal names where possible

RUN THE ACTIVITY

- 01** Place the coachee's role in the centre and add the roles that affect the chosen work. Map actual relationships, not everyone in the organisation chart.
- 02** Draw the important flows: information, decisions, resources, challenge and support. Use different line labels, not colour alone, to distinguish them.
- 03** For each critical connection, ask what is expected, what is currently exchanged and where the evidence is uncertain. Do not infer motives from a missing response.

QUESTIONS TO OPEN THINKING

Where does the work get stuck between roles?

How might your response reinforce the pattern?

What could you and the other role test together?

CONTINUE THE METHOD

- 04** Identify reciprocal patterns, such as late evidence leading to takeover, which reduces ownership and creates more late evidence. Mark this as a hypothesis to test.
- 05** Choose the smallest relationship or process change that could interrupt the pattern. Agree how the other person will be involved rather than treating them as an object of intervention.
- 06** Plan a conversation, observation or experiment and define what would change your interpretation. Review the whole system before assigning a personal deficit.

BOUNDARY & CAUTION

Maps are hypotheses, not proof of influence or hidden motives. Avoid intrusive personal-network data or politically manipulative use.

BETWEEN SESSIONS / HAND-OFF

Discuss one mapped dependency with the relevant colleague and invite them to correct the map.

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

BASIS H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X25 Relationship system map

ACTIVITY

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

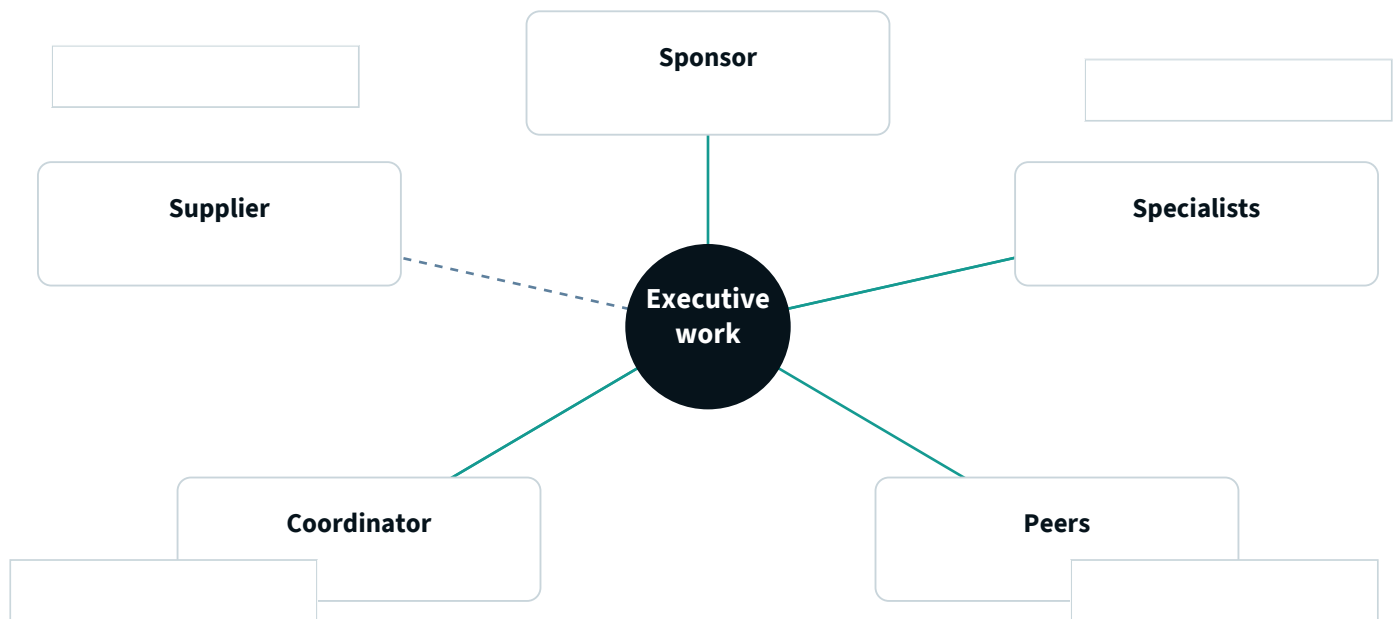
Guide

Worksheet

Example

LIVE WORKSHEET

RELATIONSHIP-SYSTEM MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Challenge

02 Roles and flows

03 Observed pattern

04 Uncertainty

05 Small system change

06 Learning question

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X25 Relationship system map

ACTIVITY

See how a leadership challenge is shaped by interdependent relationships, expectations and decision flows rather than by one person's style alone.

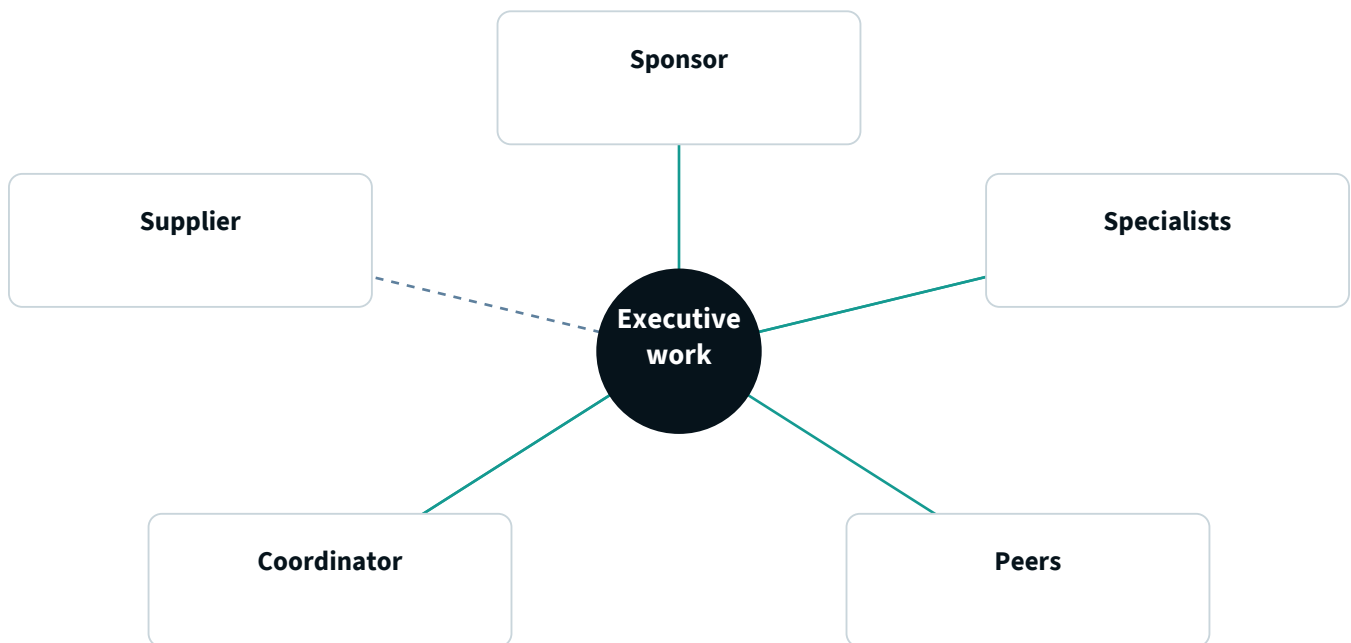
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

RELATIONSHIP-SYSTEM MAP



Solid: agreed work connection. Dashed: a hypothesis to check. Arrows show direction, not influence scores.

01 Challenge

Repeated late changes to gate recommendations.

03 Observed pattern

Late evidence prompts M-07 to rewrite; specialists then wait for M-07's preferred version.

05 Small system change

Agree evidence checkpoints and let the specialist state the recommendation before integration.

02 Roles and flows

Engineering provides assurance; commercial supplies cost options; M-07 integrates; sponsor approves material trade-offs.

04 Uncertainty

It is unclear whether delays reflect missing data, unclear ownership or the expectation of takeover.

06 Learning question

Does clearer ownership reduce waiting, or does a supplier dependency still require separate action?

Basis: H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X26

ACTIVITY

Delegation bottleneck review

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

Practical guide

Working form

Worked example

EXCEL TAB X26 Delegation bottleneck review

TIME 45 minutes

BRING Two tasks the executive recently took back | Delegation agreements if available | Operational safety and approval boundaries

RUN THE ACTIVITY

- 01** Choose a specific task, not a general complaint that the team lacks ownership. Record the intended outcome and why it was delegated.
- 02** Reconstruct the agreement: authority, quality criteria, resources, information, deadline, checkpoint and escalation. Mark what was never explicitly agreed.
- 03** Ask what happened before the executive intervened. Separate evidence of risk from assumptions about competence or commitment.

CONTINUE THE METHOD

- 04** Explore task-specific capability and available capacity with respect. The appropriate response may include instruction, resources or a management decision rather than more coaching.
- 05** Design a better agreement for a comparable task and define when intervention is necessary. Delegation never removes the executive's formal accountability.
- 06** Choose a bounded trial and a feedback conversation with the colleague. Review ownership, quality and burden rather than merely counting tasks delegated.

QUESTIONS TO OPEN THINKING

What did the colleague actually have authority to decide?

What was missing from the agreement?

When would taking back the task be justified?

BOUNDARY & CAUTION

Do not use delegation experiments for work requiring unprovided qualifications, unsafe independence or authority the colleague does not have.

BETWEEN SESSIONS / HAND-OFF

Ask the colleague what would make the next delegation clearer, then agree the trial jointly.

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

BASIS H01 / H05 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X26 Delegation bottleneck review

ACTIVITY

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

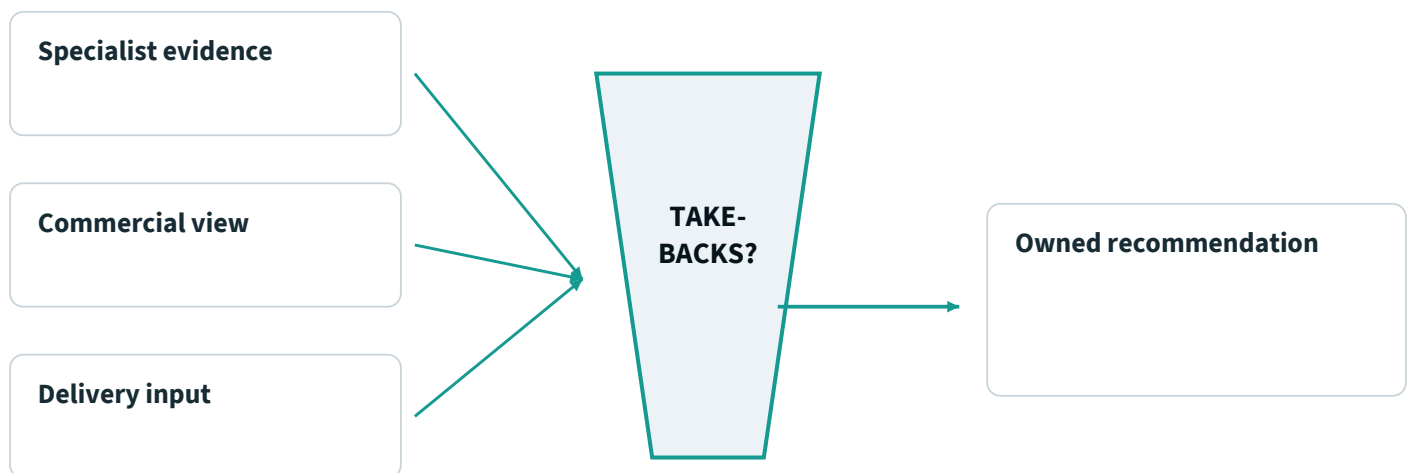
Guide

Worksheet

Example

LIVE WORKSHEET

DELEGATION BOTTLENECK FLOW



Clarify authority, evidence standard, checkpoint and escalation.

Map the actual task and handovers. A bottleneck is a question about the work, not a personality label.

01 Task

02 Original gap

03 Take-back trigger

04 Diagnosis hypothesis

05 Revised agreement

06 Trial evidence

Basis: H01 / H05 | Original executive application

X26 Delegation bottleneck review

ACTIVITY

Distinguish a delegation skill issue from missing capability, unclear authority, workload or unreliable information.

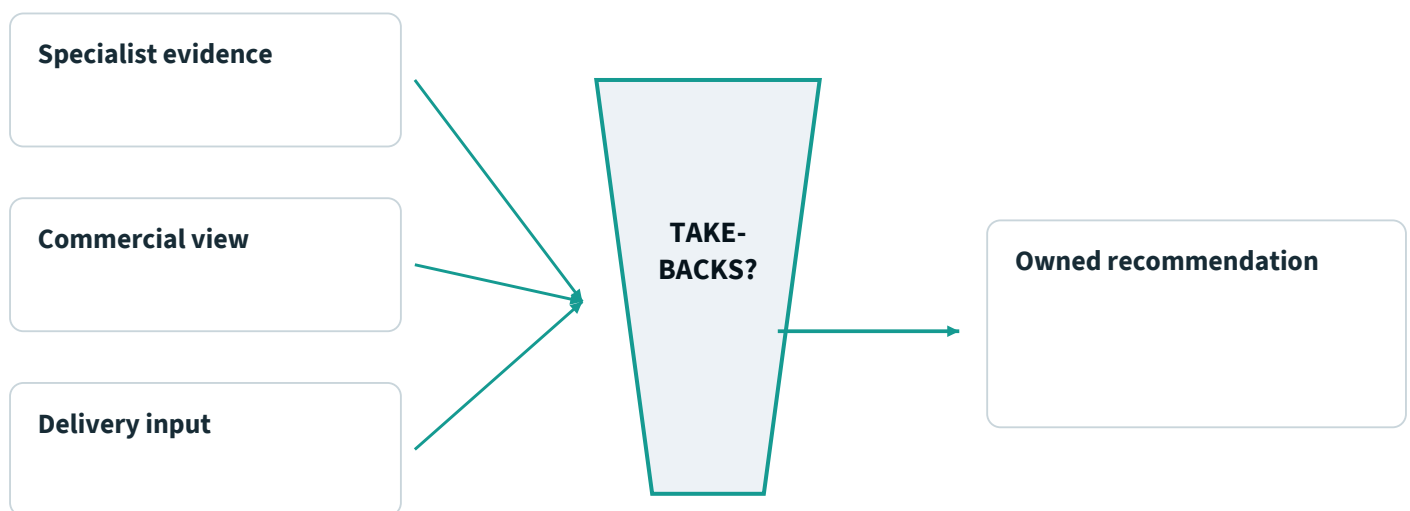
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

DELEGATION BOTTLENECK FLOW



Clarify authority, evidence standard, checkpoint and escalation.

Map the actual task and handovers. A bottleneck is a question about the work, not a personality label.

01 Task

Prepare the integrated evidence summary for a gate review.

03 Take-back trigger

A late supplier update caused M-07 to assume the recommendation was unreliable.

05 Revised agreement

Specialist owns options and recommendation; M-07 reviews decision-relevant gaps at the agreed checkpoint; technical sign-off stays with engineering.

02 Original gap

The specialist owned the draft but the acceptable evidence threshold and escalation time were unclear.

04 Diagnosis hypothesis

An unclear checkpoint and information dependency may explain the issue more than a capability deficit.

06 Trial evidence

Compare one delegated draft with the agreement and ask the specialist whether authority and support were clear.

Basis: H01 / H05 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X27

ACTIVITY

Assumptions and contrary evidence

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

Practical guide

Working form

Worked example

EXCEL TAB X27 Assumptions and contrary ev

TIME 45 minutes

BRING One recent work episode | Available records | A willingness to test the coachee's and coach's interpretations

RUN THE ACTIVITY

- 01** Ask the coachee to describe what a camera or work record could show. Separate those observations from inferred motives, predictions and personal judgements.
- 02** Write the interpretation that is driving action. Ask how certain the coachee feels, while making clear that confidence is not evidence.
- 03** Collect supporting evidence and deliberately seek an exception or contrary example. Do not turn the exercise into a debate in which the coach must prove the coachee wrong.

QUESTIONS TO OPEN THINKING

What did you observe, and what did you infer?

What would be hard to explain if your interpretation were fully correct?

How could you ask without accusing?

CONTINUE THE METHOD

- 04** Generate at least two plausible alternative explanations, including a system condition. Identify what evidence would distinguish them.
- 05** Choose an ethical information-gathering action, such as a neutral question or a review of timing, rather than covertly testing a colleague.
- 06** Revise the interpretation provisionally and decide the next action. Retain uncertainty where evidence remains insufficient.

BOUNDARY & CAUTION

Do not use this to invalidate reports of discrimination, bullying or safety concerns. Appropriate formal routes remain available.

BETWEEN SESSIONS / HAND-OFF

Capture one interpretation during the week and one piece of evidence that could change it.

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

BASIS H01 / H04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X27 Assumptions and contrary evidence

ACTIVITY

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

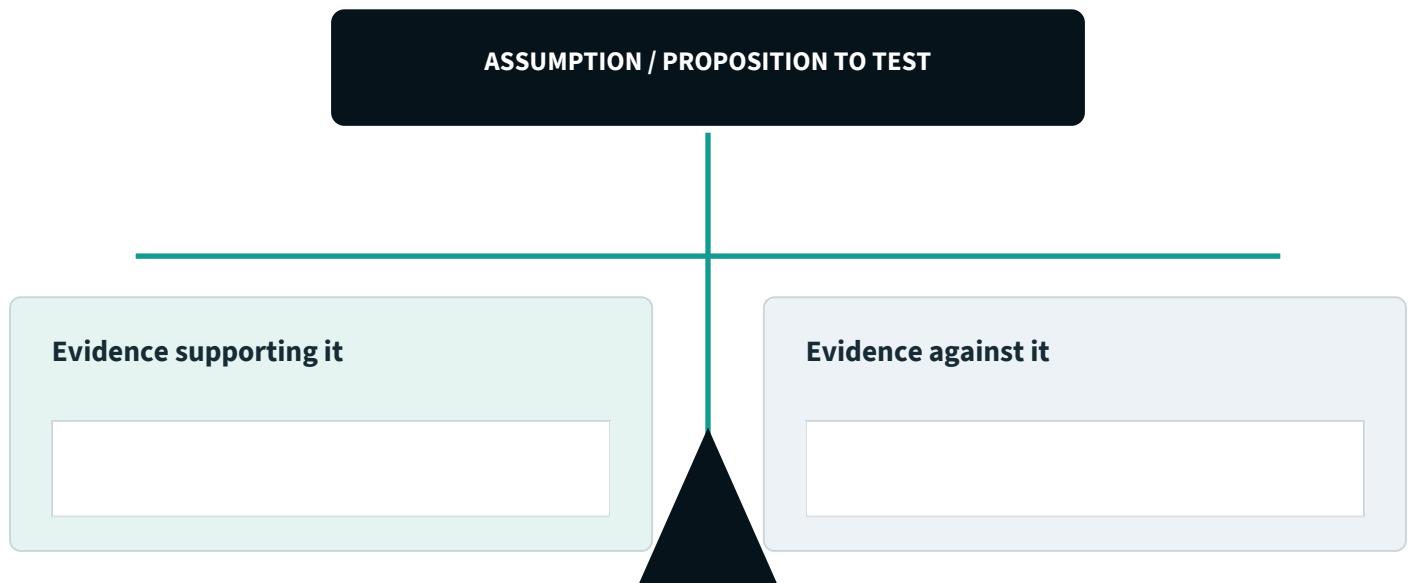
Guide

Worksheet

Example

LIVE WORKSHEET

ASSUMPTION EVIDENCE BALANCE



A contrary example may change the explanation. Evidence is not weighed by how persuasive it sounds.

01 Observed event

02 Initial interpretation

03 Supporting and contrary evidence

04 Alternatives

05 Information action

06 Provisional conclusion

Basis: H01 / H04 | Original executive application

X27 Assumptions and contrary evidence

ACTIVITY

Help an executive test a strong interpretation by separating observable evidence, assumptions and plausible alternatives.

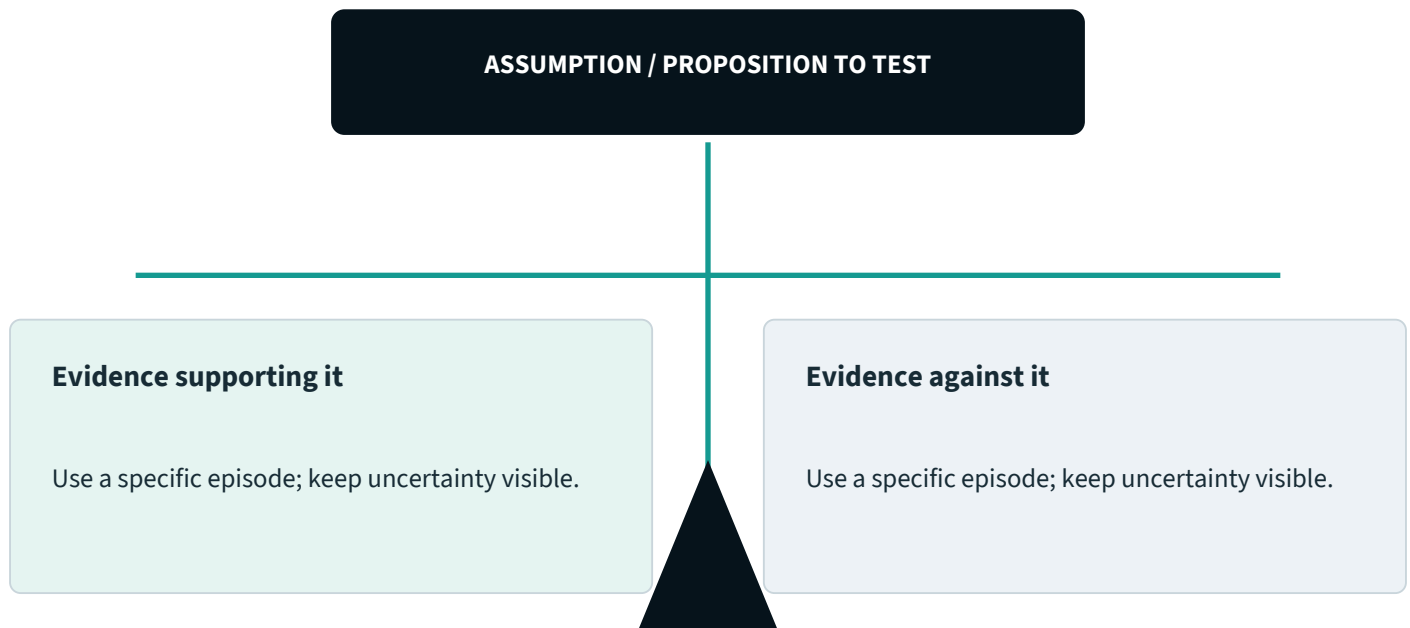
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

ASSUMPTION EVIDENCE BALANCE



A contrary example may change the explanation. Evidence is not weighed by how persuasive it sounds.

01 Observed event

A peer did not comment during the meeting and raised a concern the following day.

03 Supporting and contrary evidence

The late concern was real; in another meeting the same peer raised a risk early when invited before the recommendation.

05 Information action

Ask when the concern became clear and what would help surface it earlier.

02 Initial interpretation

The peer was undermining M-07's decision.

04 Alternatives

The peer needed more evidence, felt the decision was settled or was avoiding public disagreement.

06 Provisional conclusion

Change the meeting sequence and evidence timing before assuming hostile intent.

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X28

ACTIVITY

Control, influence and system action

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

Practical guide

Working form

Worked example

EXCEL TAB X28 Control influence and syste

TIME 40 minutes

BRING One current challenge | Known decision rights | A blank three-column worksheet

RUN THE ACTIVITY

- 01** Describe the challenge in a single concrete sentence and identify the desired work outcome. Avoid beginning with a list of people to change.
- 02** Place possible actions in three areas: within the coachee's authority, requiring agreement or influence, and outside current authority requiring escalation or acceptance.
- 03** Test each placement. A leader may have more influence than they assume, but cannot claim control over another person's choices or bypass governance.

QUESTIONS TO OPEN THINKING

What can you decide, rather than merely hope for?
Whose agreement is needed?
What should be escalated rather than carried privately?

CONTINUE THE METHOD

- 04** Identify one immediate action and one collaborative conversation. For a system issue, name the appropriate owner and the information needed for a decision.
- 05** Explore the cost of repeatedly acting outside authority or waiting for certainty. Choose a feasible step without implying that structural constraints are merely a mindset problem.
- 06** Record the boundary and review trigger. Revisit the map when authority or circumstances change.

BOUNDARY & CAUTION

Do not suggest that injustice, unsafe conditions or systemic barriers can be solved solely by changing the coachee's attitude.

BETWEEN SESSIONS / HAND-OFF

Take one action in your authority and one request to the correct owner. Bring the response, including refusal or uncertainty.

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

BASIS H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X28 Control, influence and system action

ACTIVITY

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

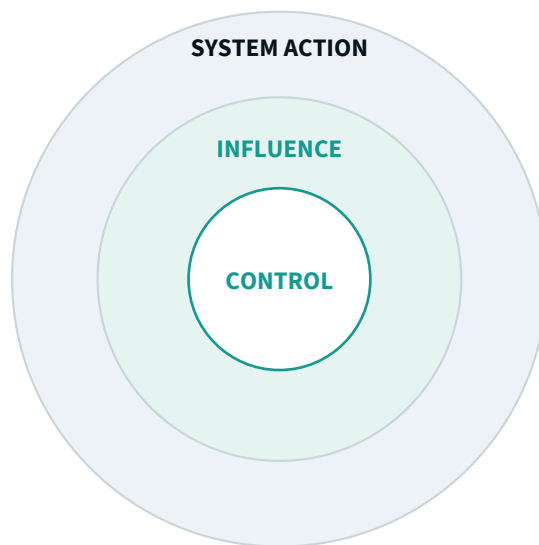
Guide

Worksheet

Example

LIVE WORKSHEET

CONTROL / INFLUENCE / SYSTEM CIRCLES



My action

A conversation or request

An owner beyond coaching

Separate what you can do, what you can influence and what requires accountable system action.

01 Challenge

02 Within authority

03 Requires agreement

04 System action

05 Immediate step

06 Review trigger

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X28 Control, influence and system action

ACTIVITY

Convert a diffuse leadership problem into personal action, collaborative influence and issues requiring accountable organisational decisions.

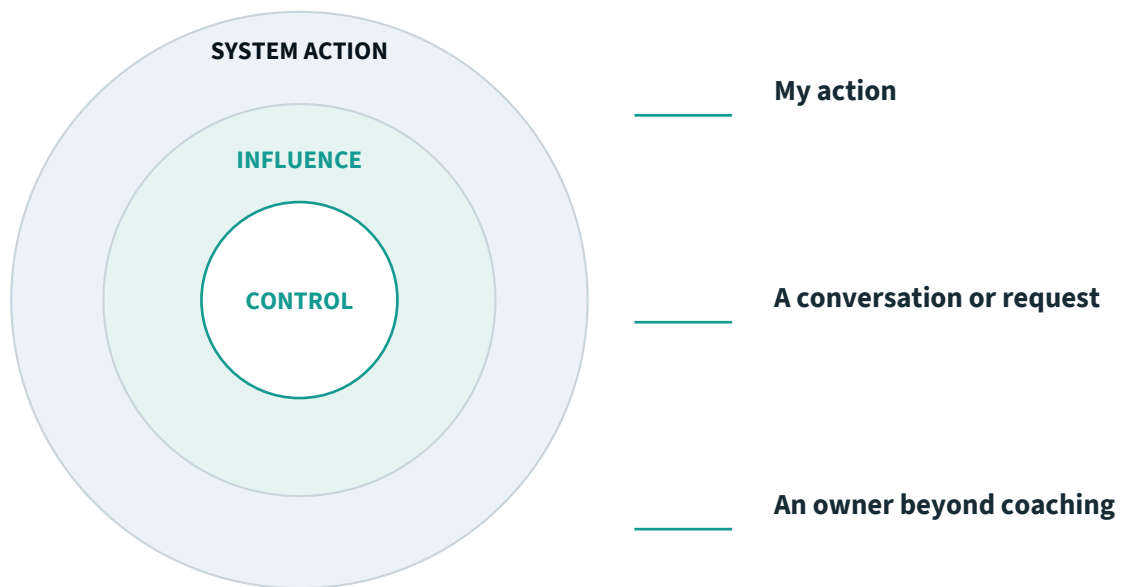
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

CONTROL / INFLUENCE / SYSTEM CIRCLES



Separate what you can do, what you can influence and what requires accountable system action.

01 Challenge

Evidence arrives too late for a useful gate discussion.

03 Requires agreement

Specialists and commercial colleagues must agree evidence deadlines and exception handling.

05 Immediate step

Agree the next gate's evidence checkpoint with the relevant leads.

02 Within authority

M-07 can circulate the decision question earlier and clarify the minimum brief.

04 System action

Supplier-contract response requirements need the procurement owner's decision.

06 Review trigger

If the supplier dependency still prevents preparation, escalate the documented pattern rather than repeatedly rescuing the brief.

Basis: H01 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X29

ACTIVITY

Leadership context wheel

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

Practical guide

Working form

Worked example

EXCEL TAB X29 Leadership context wheel

TIME 45 minutes

BRING Six headings: mandate, relationships, resources, capability, feedback and opportunity | Current goal | Optional personal ratings with locally defined anchors

RUN THE ACTIVITY

- 01** Draw six spokes and explain that the wheel is an original reflection aid. The coachee can rename a heading to fit the actual role.
- 02** Describe each condition using a recent example. If ratings help discussion, define the endpoints together and record them; no number has a normative meaning.
- 03** Ask where conditions interact. Strong capability cannot compensate indefinitely for unclear authority or absent resources.

QUESTIONS TO OPEN THINKING

What does a workable condition look like for this role?

Which two conditions reinforce each other?

What would change in work if this spoke improved?

CONTINUE THE METHOD

- 04** Select one condition whose improvement would make the coaching goal more feasible. Look for an organisational action as well as a personal action.
- 05** Define an observable signal and a responsible owner. Do not average the spokes or infer overall readiness from a rounded shape.
- 06** Retain the first version and review the evidence later. Changes in understanding may explain a different rating as much as changes in the condition itself.

BOUNDARY & CAUTION

The wheel is not a validated readiness, wellbeing or leadership assessment. Avoid fixed cut-offs, colour-only judgements or comparisons between people.

BETWEEN SESSIONS / HAND-OFF

Revisit one condition after a real work event and record what changed in evidence, not just the rating.

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

BASIS H01 / H02 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X29 Leadership context wheel

ACTIVITY

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

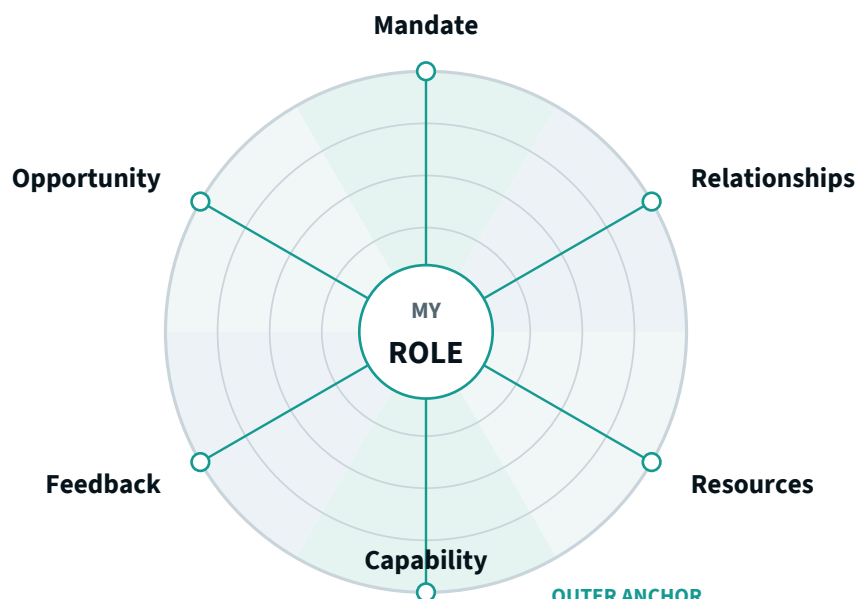
Guide

Worksheet

Example

LIVE WORKSHEET

SIX-SPOKE LEADERSHIP CONTEXT WHEEL



INNER ANCHOR

OUTER ANCHOR

Words or optional locally anchored positions; no total, comparison norm or ideal wheel.

01 Mandate

02 Relationships

03 Resources

04 Capability and feedback

05 Priority condition

06 Review evidence

Basis: H01 / H02 | Original executive application

X29 Leadership context wheel

ACTIVITY

Create a visual conversation about the conditions around leadership, without producing a psychometric profile or an ideal shape.

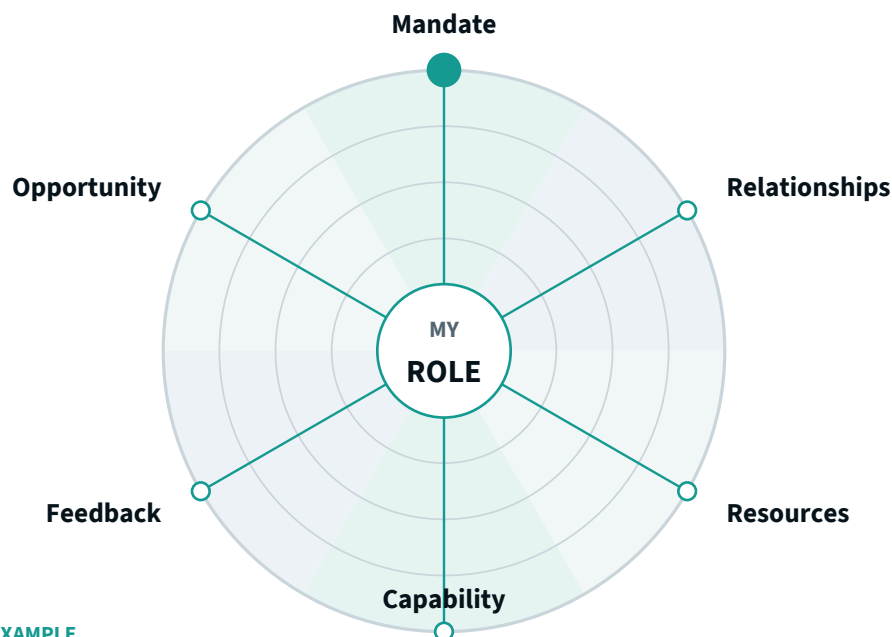
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

SIX-SPOKE LEADERSHIP CONTEXT WHEEL



PRIORITY IN THE SOURCE EXAMPLE

Mandate: clarify the decision boundary before the next gate.

Words or optional locally anchored positions; no total, comparison norm or ideal wheel.

01 Mandate

Integrated recommendation owned by M-07; material scope authority still needs clarification.

02 Relationships

Specialists are willing to contribute but evidence expectations vary.

03 Resources

Preparation time exists on paper but is repeatedly interrupted.

04 Capability and feedback

M-07 can frame options; feedback on inviting challenge is mixed.

05 Priority condition

Clarify the decision boundary and protect one evidence checkpoint.

06 Review evidence

Use the next two gate records and colleague accounts; no total score or ideal wheel is calculated.

Basis: H01 / H02 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X30

ACTIVITY

Integrated coaching formulation

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

Practical guide

Working form

Worked example

EXCEL TAB X30 Integrated coaching formula

TIME 60 minutes

BRING Contracted goal | Work episodes and proportionate assessment evidence | Known constraints and counterexamples

RUN THE ACTIVITY

- 01** Ask the coachee to restate the goal and why it matters now. Confirm that the original contract still fits before synthesising evidence.
- 02** Organise the evidence into situation, behaviour, consequences, strengths and conditions. Label report findings by evidence type and separate assumptions from observations.
- 03** Explore one plausible maintaining pattern and at least one alternative explanation. Include relationships, authority and work design rather than locating every issue inside the person.

QUESTIONS TO OPEN THINKING

What account fits the evidence without explaining too much?

What else could be happening?

What would make us change our minds?

CONTINUE THE METHOD

- 04** Identify the leverage points: a conversation, a rehearsal, a workplace experiment or a system request. Choose the smallest useful combination, not a large treatment plan.
- 05** Agree how the hypothesis could be tested and what would make you revise it. The coachee may reject the coach's formulation or prefer a simpler description.
- 06** Write a brief shared formulation and an action sequence. Record what is excluded, who owns system actions and what may be shared with the sponsor.

BOUNDARY & CAUTION

A coaching formulation is a shared work hypothesis, not a clinical diagnosis, hidden personality analysis or automatic employment decision.

BETWEEN SESSIONS / HAND-OFF

Read the formulation privately, edit anything that does not fit, then choose the first experiment you genuinely own.

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

BASIS H01 / H04 / R04 | Original executive application

01 Align

02 Agree

03 Assess

04 Activate

05 Apply

06 Assure

X30 Integrated coaching formulation

ACTIVITY

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

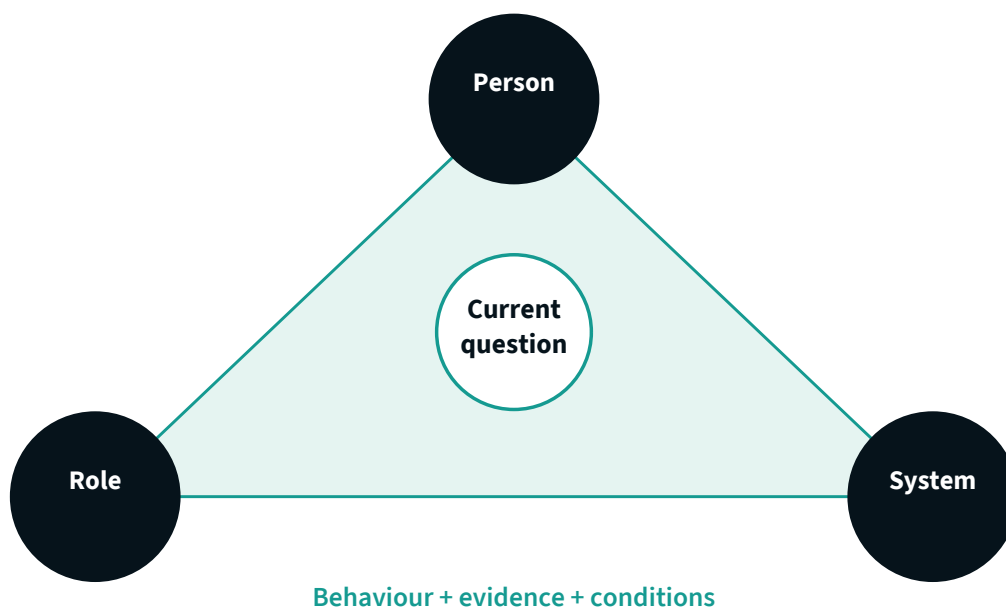
Guide

Worksheet

Example

LIVE WORKSHEET

PERSON-ROLE-SYSTEM FORMULATION



Use all three lenses. A personal explanation does not remove organisational responsibility.

01 Goal

02 Evidence

03 Working pattern

04 Alternative explanation

05 Leverage points

06 Test and review

Basis: H01 / H04 / R04 | Original executive application

X30 Integrated coaching formulation

ACTIVITY

Bring goals, context and evidence into a shared, revisable account of what may help the executive and what coaching cannot solve alone.

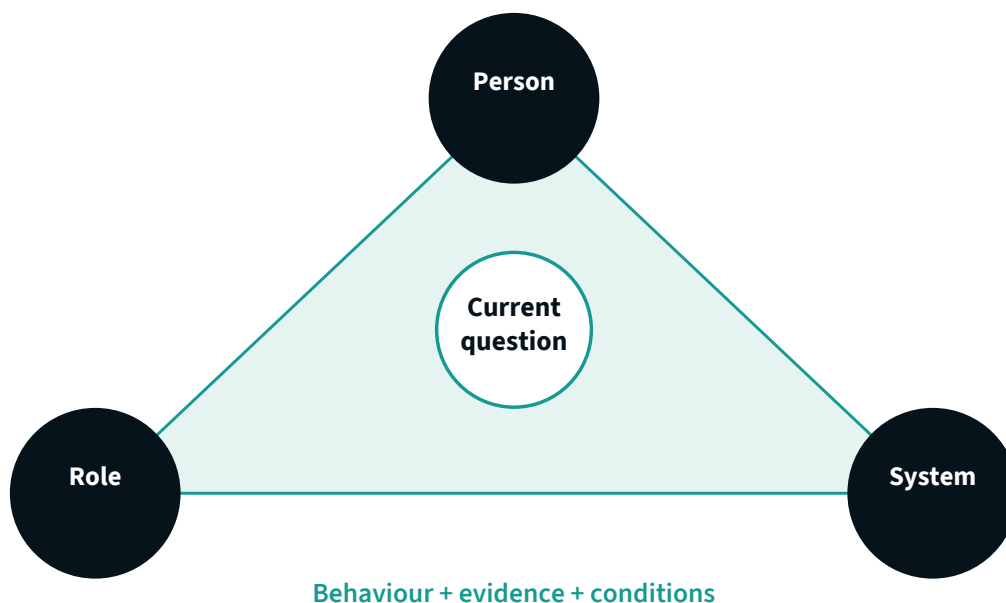
Guide

Worksheet

Example

FICTIONAL WORKED EXAMPLE

PERSON-ROLE-SYSTEM FORMULATION



Use all three lenses. A personal explanation does not remove organisational responsibility.

01 Goal

Lead gate decisions with clearer ownership and more useful challenge.

03 Working pattern

Unclear checkpoints increase uncertainty; M-07 responds by taking over, which may reduce others' ownership.

05 Leverage points

Agree checkpoints, rehearse concerns-first questions and request clarification of scope authority.

02 Evidence

Two late-evidence episodes, an authorised preference report and consented stakeholder accounts; none alone establishes a cause.

04 Alternative explanation

Supplier dependencies could continue to cause delay even with better leadership practice.

06 Test and review

Review two gate cycles; revise the formulation if ownership improves but delay remains, and address the system dependency separately.

Basis: H01 / H04 / R04 | Original executive application



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.

S02

Assessment and 360 debrief session

75 minutes

Run sheet 127 / Annotated dialogue 128

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.

Assessment and 360 debrief session

Understand one authorised report, preserve its evidence limits and choose a practical behavioural experiment.

Time	Focus	Coach action
0-10	Permission and readiness	Check purpose, access, privacy rules and how the coachee wants to approach the report.
10-20	Explain the evidence	Clarify scale meaning, observation groups, missing data and relevant technical limitations.
20-40	Explore the pattern	Discuss a strength, a discrepancy and an uncertain area, using work episodes and counterexamples.
40-55	Develop a hypothesis	Separate preference, intention, behaviour and system context; avoid causal labels.
55-68	Design an experiment	Choose one practice, rehearse it and agree the opportunity, support and feedback.
68-75	Close and protect	Record what is supported, what is not established and what may be shared.

BETWEEN-SESSION ASSIGNMENT

Use X23 and X24. Tell stakeholders only the agreed practice and ask the narrow feedback questions in X64 after two relevant opportunities. Do not seek to identify raters or repeat the whole test immediately.

PREPARATION & LIMIT

Tool route: T29-T30, X22-X24, X64. Requires an authorised report, suitable technical guidance and competent interpretation. This session does not reproduce test items, invent norms or waive privacy thresholds.



Assessment and 360 debrief session

Understand one authorised report, preserve its evidence limits and choose a practical behavioural experiment.

Speaker / coaching purpose	Illustrative dialogue
Coach / Returns to purpose.	Before looking at the scores, what question did we ask this report to help us explore?
M-07 / Focuses interpretation.	Whether colleagues experience enough opportunity to challenge a recommendation.
Coach / Does not average away context.	The peer and manager perspectives are different. What opportunities did each have to observe you?
M-07 / Identifies different evidence.	The manager sees formal gates; peers also see preparation meetings.
Coach / Seeks both support and contradiction.	What episode might explain the peer experience, and when was the opposite true?
M-07 / Suggests a testable sequence.	I often state a preference early. At one handover I asked for concerns first and the discussion was better.
Coach / Retains uncertainty.	That gives us a practice to test, not proof of a personality cause. What would you try?
M-07 / Owned behavioural choice.	Ask what could change the recommendation before I present it.
Coach / Protects privacy and closes the feedback loop.	What can you tell contributors without exposing individual responses?

DEBRIEF AND NEXT DECISION

Review the actual opportunity to contribute, the effect on the decision and any burden. A favourable response is not required; contrary feedback is useful evidence.

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.

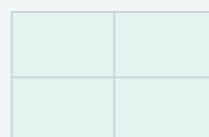
CHOOSE THE VISUAL WORKING SURFACE



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.