# OVERVIEW

## Leadership Case Consent

Diagnose the situation, choose a target and capture the first insight.

| CLIENT / TEAM | COACH | SESSION DATE |
|---|---|---|
| | | |

**PURPOSE**

Use this coaching worksheet to request permission for exactly what a client story reveals. Leave with a case-consent form outline that can be tested in real, respectful, consent-based work.

**WHY THIS MATTERS**

Start with sponsor interviews, manager challenges and permissioned programme feedback. Watch for assuming anonymous means unidentifiable. Review approved safe stories as a learning signal, not a promised result.

**SELF-ASSESSMENT / SCORE EACH DIMENSION 1 TO 10**

| LOOK FOR | NOW /10 | GOAL /10 |
|---|---|---|
| 01 Audience fit | | |
| 02 Problem clarity | | |
| 03 Coaching fit | | |
| 04 Proof quality | | |
| 05 Differentiation | | |
| 06 Message recall | | |

**QUICK REFLECTION**

Which dimension is the best starting point for this focus: request permission for exactly what a client story reveals?

# DEEP WORK I

## Leadership Case Consent

Use actual evidence. Separate what happened from what you assume it means.

### 01 / CURRENT PICTURE

01 Review sponsor interviews, manager challenges and permissioned programme feedback. What observed moment shows the need to request permission for exactly what a client story reveals?

02 What did the leader, colleague or sponsor actually say or do? Record one concrete example.

### 02 / THE LEVER

03 When you try to request permission for exactly what a client story reveals, which step breaks down first, and in what context?

04 What assumption are you making that the evidence does not yet support? How could you check it?

### 03 / PRACTICE & TEST

05 Coach question: Could the team recognise itself from the details?

06 How could you replace assuming anonymous means unidentifiable with a fair, specific and testable move?

# DEEP WORK II + WORKSHEET

## Leadership Case Consent

Build a usable artifact, then pressure-test it with a real-world scenario.

07 What must a case-consent form outline contain to help the user request permission for exactly what a client story reveals? Name the first two decisions it supports.

08 Where might assuming anonymous means unidentifiable show up? How will you notice it and adjust before a colleague or participant is affected?

### REALITY SCORECARD

Complete five rows while building a case-consent form outline. Use only approved, non-sensitive examples.

| CRITERION | EVIDENCE | NOW /10 | TARGET /10 |
|---|---|---|---|
| 01 | | | |
| 02 | | | |
| 03 | | | |
| 04 | | | |
| 05 | | | |

### BRING INTO THE NEXT COACHING CONVERSATION

Ask: Could the team recognise itself from the details? Check: approved safe stories.

# ACTION PLAN

## Leadership Case Consent

Move from insight to observable practice, with a realistic measure and review date.

### FROM INSIGHT TO ACTION

| STEP | PRACTICE ACTION | BY WHEN |
|---|---|---|
| 01 REVIEW | Inspect one real example from sponsor interviews, manager challenges and permissioned programme feedback. | |
| 02 BUILD | Draft a case-consent form outline using that evidence. | |
| 03 REHEARSE | Practise the move with a coach or peer and request one correction. | |
| 04 TEST | Try it in one relevant, consented team or stakeholder interaction. | |
| 05 ADAPT | Review approved safe stories and change one thing. | |

### SUCCESS METRIC

Leading signal: approved safe stories. Choose a baseline and a realistic target; outcomes are not guaranteed.

### MILESTONES / WHEN WILL YOU LOOK FOR EVIDENCE?

| CHECKPOINT | WHAT YOU EXPECT TO SEE | REVIEW DATE |
|---|---|---|
| DAY 30 | | |
| DAY 60 | | |
| DAY 90 | | |

SUPPORT NEEDED

MAIN RISK

# COMMITMENT & FIELD NOTES

## Leadership Case Consent

Agree the next move, track what happened and return with evidence.

### MY COMMITMENT

In the next relevant situation, I will use a case-consent form outline to request permission for exactly what a client story reveals.

### IF THIS GETS IN THE WAY, I WILL...

PARTICIPANT SIGNATURE

DATE

### WEEKLY FIELD NOTES

| WEEK | SITUATION | WHAT I TRIED | EVIDENCE + ADJUSTMENT |
|---|---|---|---|
| 01 | | | |
| 02 | | | |
| 03 | | | |
| 04 | | | |

### IN THE COLLEAGUE OR SPONSOR'S WORDS / USE PERMISSIONED, NON-SENSITIVE WORDING

NEXT REVIEW

ACCOUNTABILITY PARTNER

Keep participant and team data private. No results are guaranteed.