OVERVIEW

Programme Disqualifiers

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

CLIENT / ROLE	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to identify conditions that require another professional first. Leave with a fit-and-referral checklist that can be tested in real, respectful, consent-based work.

WHY THIS MATTERS

Start with client interviews, manager challenges and permissioned programme feedback. Watch for accepting clinical or disciplinary work as coaching. Review poor-fit enquiries declined early 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: identify conditions that require another professional first?

DEEP WORK I

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

01 / CURRENT PICTURE

01 Review client interviews, manager challenges and permissioned programme feedback. What observed moment shows the need to identify conditions that require another professional first?

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

02 / THE LEVER

03 When you try to identify conditions that require another professional first, 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: When should a specialist take the lead instead?

06 How could you replace accepting clinical or disciplinary work as coaching with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

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

07 What must a fit-and-referral checklist contain to help the user identify conditions that require another professional first? Name the first two decisions it supports.

08 Where might accepting clinical or disciplinary work as coaching show up? How will you notice it and adjust before the client or a colleague is affected?

SCRIPT LAB

Complete five rows while building a fit-and-referral checklist. Use only approved, non-sensitive examples.

MOMENT	WORDS TO TRY	PERSON RESPONSE	REVISION
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: When should a specialist take the lead instead? Check: poor-fit enquiries declined early.

ACTION PLAN

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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 client interviews, manager challenges and permissioned programme feedback.	
02 BUILD	Draft a fit-and-referral checklist using that evidence.	
03 REHEARSE	Practise the move with a coach or peer and request one correction.	
04 TEST	Try it in one relevant, a real, consented work interaction.	
05 ADAPT	Review poor-fit enquiries declined early and change one thing.	

SUCCESS METRIC

Leading signal: poor-fit enquiries declined early. 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

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

MY COMMITMENT

In the next relevant situation, I will use a fit-and-referral checklist to identify conditions that require another professional first.

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 CLIENT OR MANAGER'S WORDS / USE PERMISSIONED, NON-SENSITIVE WORDING

NEXT REVIEW

ACCOUNTABILITY PARTNER

Keep client and employer data private. No results are guaranteed.