OVERVIEW

Client Case Consent

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

CLIENT / ROLE	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 client 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

Client Case Consent

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 request permission for exactly what a client story reveals?

02 What did the client, colleague or manager 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

Client 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 the client or a colleague 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

Client 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 client 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, a real, consented work 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

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

NEXT REVIEW

ACCOUNTABILITY PARTNER

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