

COACHING RELATIONSHIP RECORD

Reusable form - establish the working context for one coaching relationship.

PERSON

CURRENT ROLE

STEWARD

RELATIONSHIP STARTED

IMPORTANT WORK

What work matters most right now?

CURRENT RESPONSIBILITY

What is this person expected to carry?

PERFORMANCE WORTH BUILDING ON

What has already been demonstrated?

WORK UNIVERSE CONTEXT

What conditions may affect performance?

COACHING DIRECTION

Reusable form - define the current coaching horizon.

PERSON

DATE

CURRENT CAPABILITY

What can the person now carry reliably?

DEVELOPMENT

What should become stronger?

PERSON'S DIRECTION

What contribution or responsibility does the person want to explore?

EVIDENCE GAP

What do we still need to learn?

CURRENT COACHING PRIORITY

What matters most now?

EVIDENCE RECORD

Reusable form - capture one meaningful work event or observation.

PERSON**DATE****WORK / SITUATION****WHAT HAPPENED?**

Record the meaningful event, result, decision, behavior, or change.

WHAT DID THE PERSON DEMONSTRATE?

Capability, judgment, behavior, learning, accountability, or contribution.

WHAT ELSE COULD EXPLAIN IT?

Consider context before turning one observation into a conclusion.

WHAT DOES THIS ADD TO MY UNDERSTANDING?

What became clearer?

WHAT NEXT?☐ Keep observing☐ Clarify☐ Coach☐ Develop / Test☐ Reassess

PERFORMANCE COACHING CONVERSATION

Reusable form - evidence and clarification.

PERSON

DATE

1. PREVIOUS COMMITMENTS

What happened since we last talked?

2. PERFORMANCE WORTH REPEATING

What should continue? What evidence supports it?

3. COURSE CORRECTIONS

What should change?

WHAT IS DRIVING THIS?

- ☐ Individual contribution ☐ Expectations ☐ Authority / resources ☐ Priorities
- ☐ Process ☐ Work Universe conditions ☐ Still unclear

WHAT DID WE CLARIFY?

What changed in our shared understanding?

PERFORMANCE COACHING CONVERSATION

Reusable form - development, direction, and commitments.

PERSON

DATE

4. CURRENT CAPABILITY

What can the person now carry reliably? Where is support still needed?

5. DEVELOPMENTAL PRIORITY

What one capability matters most now? What real work could develop or test it?

6. CAREER DIRECTION

What direction does the person want to explore? What is demonstrated? What remains unproven?

7. COMMITMENTS

STEWARD

PERSON

EVIDENCE WE WILL LOOK FOR

NEXT DISCUSSION

WHAT SHOULD BE VISIBLY DIFFERENT?

DEVELOPMENTAL ASSIGNMENT PLAN

Reusable form - define the development and real work.

PERSON

DATE

ASSIGNMENT / OPPORTUNITY

START

EXPECTED COMPLETION

CAPABILITY TO DEVELOP OR TEST

What specifically should this reveal or strengthen?

WHY IT MATTERS

Why does this capability matter?

REAL WORK

What meaningful work will the person actually carry?

EXPECTED OUTCOME

What should the work produce?

DEVELOPMENTAL ASSIGNMENT PLAN

Reusable form - authority, support, and guardrails.

PERSON

DATE

AUTHORITY & BOUNDARIES

THE PERSON MAY DECIDE

CONSULT BEFORE

THE PERSON MAY NOT

SUPPORT

What information, access, training, expertise, or sponsorship will be available?

PRODUCTIVE DISCOMFORT

What should feel unfamiliar or challenging? What would make the challenge unreasonable?

INTERVENTION THRESHOLDS

When must the Steward intervene? When should the person request help?

DEVELOPMENTAL ASSIGNMENT PLAN

Reusable form - capture checkpoint evidence.

PERSON

DATE

CHECKPOINT / MILESTONE

WHAT HAPPENED?

What did the work actually produce?

WHAT CAPABILITY WAS DEMONSTRATED?

What evidence supports that conclusion?

WHERE WAS SUPPORT REQUIRED?

What could the person carry independently and where was intervention needed?

WHAT CHANGED WHEN CONDITIONS BECAME DIFFICULT?

How did judgment, behavior, or performance change?

WHAT SURPRISED ME?

What evidence challenged my prior view?

WORK UNIVERSE RISK NOW

☐ Lower

☐ About the same

☐ Higher

DEVELOPMENTAL ASSIGNMENT PLAN

Reusable form - reassess what the work revealed.

PERSON

DATE

WHAT DID THE ASSIGNMENT ACTUALLY REVEAL?

What became clearer?

DEMONSTRATED

What can the person now carry with evidence?

STILL UNPROVEN

What evidence is still missing?

ASSUMPTION THAT CHANGED

What earlier judgment should be revised?

NEXT LEVEL OF RESPONSIBILITY THE EVIDENCE SUPPORTS

What is now reasonable?

WHAT SHOULD HAPPEN NEXT?

☐ Continue

☐ Increase responsibility

☐ Add support

☐ Test again

☐ Use readiness assessment

REASSESSMENT DATE / CONDITION

READINESS ASSESSMENT

Reusable form - use for a specific role, assignment, placement, or responsibility.

PERSON

DATE

OPPORTUNITY / RESPONSIBILITY

PURPOSE & IMPORTANT OUTCOMES

What does this opportunity require the person to accomplish?

CONSEQUENCES OF WEAK PERFORMANCE

What is at risk if the work is not carried well?

CRITICAL REQUIREMENTS

REQUIREMENT

IMPORTANCE

READINESS

EVIDENCE / UNTESTED

TRANSFERABLE CAPABILITY

What already demonstrated capability could create immediate value?

READINESS ASSESSMENT

Reusable form - weigh gaps, support, and Work Universe Risk.

PERSON

DATE

MOST IMPORTANT GAPS

Which requirements remain insufficiently demonstrated?

WHAT COULD DEVELOP AFTER PLACEMENT?

What can reasonably be learned with support and time?

WHAT MUST BE DEMONSTRATED FIRST?

What cannot responsibly remain unproven?

SUPPORT THAT COULD REDUCE RISK

What support or guardrails would make the opportunity more responsible?

EARLY WARNING SIGNS

What evidence would require intervention or reconsideration?

WORK UNIVERSE CONSEQUENCES

What happens to the Work Universe if the judgment is wrong?

STEWARD'S JUDGMENT

- ☐ Ready now
- ☐ Ready with defined support
- ☐ Potentially ready after additional testing
- ☐ Development required before placement
- ☐ Better suited to a different opportunity

JUDGMENT RATIONALE

CAREER READINESS EQUATION

Reusable form - clarify direction, evidence, opportunity, risk, and shared understanding.

PERSON

DATE

DESIRED DIRECTION

What contribution or responsibility does the person want to pursue?

DEMONSTRATED READINESS

What does the evidence support now?

OPPORTUNITY

What real opportunity exists or may realistically emerge?

THE GAP

What separates current reality from desired direction?

WORK UNIVERSE RISK

What risk belongs to the Steward?

TIME & DEVELOPMENT

What could reasonably change with experience or time?

SHARED UNDERSTANDING

What is clear between us?

WHAT IS NOT BEING PROMISED?

What must remain explicit to avoid accidental commitment?

Next reassessment date or condition

WORK UNIVERSE RISK is Steward-owned. SWEAT INVESTMENT remains a separate private person-owned judgment and is not recorded on this shared form.

COACHING TRAJECTORY & REASSESSMENT

Reusable form - capture the developmental trajectory without turning it into a rating.

PERSON

DATE

WHAT CHANGED?

What is materially different from the start of this coaching period?

BECAME STRONGER

What capability or contribution strengthened?

REMAINS UNCERTAIN

What evidence is still incomplete?

MOST IMPORTANT EVIDENCE

What evidence should carry forward?

WHAT I LEARNED ABOUT THIS PERSON

What became clearer?

WHAT I LEARNED ABOUT MY COACHING

What should I continue, change, or strengthen?

WHAT SHOULD WE EXPLORE NEXT?

What capability, responsibility, or evidence should come next?