



ASCENDEA

AI / BUSINESS GROWTH / EBOOK & PLANNING WORKBOOK

Self-Coaching for Realistic Work Decisions — Guide & Planning Workbook

A practical, non-clinical workbook for clarifying a work decision, separating facts from assumptions, choosing a bounded next action, and reviewing what support or work-design change is needed. Includes values filters, private reflection worksheets, capacity-aware planning, HSE-aligned work-design prompts and a flexible 30/60/90-day review.



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Guide & Planning Workbook

For UK SME owners, managers and team members

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Use this guide to make a workable next decision

Work decisions often arrive before there is enough time, certainty or capacity to make an ideal plan. You may be deciding what to prioritise, how to respond to a difficult request, whether to raise a workload issue, or how to take the next step on a project that matters to you.

This workbook offers a practical way to pause, clarify and choose a bounded next action. It uses values, realistic reflection and a 30/60/90-day review to help turn a vague intention into a plan that fits the work and life you actually have.

It is **general, non-clinical education**. It does not diagnose, assess or treat any condition, and it is not therapy or a substitute for professional care. It is also not a replacement for useful mentoring, peer support, line-management conversations or professional coaching. Those can be valuable forms of support when they suit the situation.

The exercises are optional. Use a paper notebook, a private document or the spaces in this workbook. You do not need to record personal history, rate your wellbeing, explain yourself to a manager or share your notes with anyone. If a question is not useful today, skip it. If an exercise leaves you unsettled, stop and choose a practical alternative such as taking a break, gathering information, speaking with someone you trust, or returning to it later.

A realistic work decision does not have to solve everything. It identifies the next useful action, the limits around it and the conversation or work-design change that may be needed.

A note on privacy at work

Keep personal reflection private by default. This workbook is not a staff-monitoring form, a health assessment or a journal to be collected by a manager. Do not paste sensitive notes, employee disclosures or inferred wellbeing scores into an AI tool simply to analyse them.

Information concerning health is **special category data** under UK GDPR rules and needs additional protection. 4 Organisations need a lawful basis and a separate condition for processing it; they should not create informal collections of sensitive information through a wellbeing exercise. 7

If you choose to discuss a work issue, share only what is needed to move the work forward. You might discuss unclear priorities, a deadline conflict, missing information, inadequate cover or a needed adjustment. You decide what personal detail, if any, to include.

Part 1: Start with the decision, not a verdict about yourself

A difficult work choice can easily become a judgement: *I should know what to do, I have fallen behind, or I must fix this alone*. Those statements do not usually identify the decision in front of you. Begin with the practical question instead.

A self-coaching cycle can be simple:

1. **Name the decision.** What choice, request, problem or commitment needs attention?
2. **Separate facts from assumptions.** What do you know? What still needs checking?
3. **Check what matters.** Which work or personal values should influence the choice?
4. **Check the conditions.** What time, authority, support, information or flexibility is actually available?
5. **Choose one bounded action.** Pick an action you can take, a conversation you can request, or a decision you can defer with a clear reason.
6. **Review without scoring yourself.** Notice what happened and adapt the plan.

This is not a test of confidence, motivation or character. Its purpose is to make the next step visible.

Worksheet 1: Decision snapshot

Choose one live decision. Keep the description factual and as brief as you need.

The decision or issue I am dealing with is:

The decision needs attention by (if there is a real date):

What I know from evidence, instructions or agreed facts:

What I am assuming, predicting or still need to ask:

Who is affected by this decision, and what do they need to know?

What is outside my control or authority?

The smallest useful outcome for now would be:

Use values as decision filters, not rules to live up to

Values are words for what you want to protect or express in the way you work. They can include reliability, fairness, learning, care, craft, financial stability, autonomy, inclusion, honesty, service, creativity or time with people who matter to you. They are not a personality label and they do not require a dramatic career change.

For a work decision, a value becomes useful when it helps you see a trade-off. For example, a founder might value both service and sustainability. That could lead to a clearer choice: protect a client commitment where possible, while being honest that the current deadline needs to move because the available capacity cannot safely cover it.

Values do not remove constraints. Caring responsibilities, disability, shift patterns, finances, contracts, deadlines and limited influence all matter. A value filter helps you articulate what a good-enough choice looks like **within** those constraints. It does not require you to ignore them.

Worksheet 2: My work decision filters

Pick up to three values that feel relevant to this decision. Fewer is fine.

What matters in this decision	What it could look like in practice	Tension or trade-off I need to acknowledge
_____	_____	_____
_____	_____	_____
_____	_____	_____

If I act in line with these values, the next decision could be:

What would make that choice unrealistic or unfair to expect from myself alone?

What permission, information, resource, cover or agreement would make it more workable?

Illustrative SME scenario: a deadline that no longer fits

This is an **illustrative composite scenario**, not a client story or a claimed result. A manager in a small digital agency has promised a client a campaign review on Friday. A colleague is unexpectedly unavailable and the manager is also responsible for a safeguarding meeting that cannot move.

Instead of turning the situation into a private failure, the manager could name the decision: *What can we deliver responsibly by Friday?* Their filters might be accuracy, honesty and care for the team. A bounded action might be to map the essential review work, ask the director to choose between a reduced Friday scope and a revised date, and explain the trade-off to the client. The personal routine is a five-minute preparation note. The work action is a scope and capacity decision made with the people who can change it.

Part 2: Respond to a critical thought with useful information

Many people notice an unhelpful thought before a decision: *I will get this wrong*, *I should be able to cope*, *Everyone else can manage this*, or *There is no point asking*. You do not need to diagnose the thought, debate its origin or force a positive replacement. You can treat it as a prompt to check the situation more carefully.

Try the four-step **Notice–Check–Choose–Support** approach.

1. Notice

Write the thought in plain language. Avoid turning it into a label about who you are.

2. Check

What observable facts support it? What facts make it less certain? Which part is an assumption, a prediction or a standard that has not been agreed?

3. Choose

Write a neutral, useful statement and one next question. A neutral statement might be: *I do not yet know whether this is possible in the current time; I can check the scope and ask what can move.*

4. Support

Decide whether this needs a private next action, a colleague's input, a manager's decision, a mentor's perspective, or support outside work. Asking for the right help is a work decision, not a failure of self-coaching.

Worksheet 3: From a thought to a practical question

The exact thought or assumption I noticed:

Facts I can point to:

What I do not know yet:

A more neutral and accurate working statement:

The next question I can ask, or information I can gather:

The support or decision-holder I may need:

You may prefer not to write at all. A verbal version can be just as useful: state the facts to yourself, ask one question and make a short note of the next action. If attention is limited, you can pause before replying to a message, look at a practical task list, get a drink, change position if comfortable, or ask for ten minutes to check the facts. There is no required breathing, meditation or reflection routine in this guide.

Illustrative SME scenario: preparing to speak up

This is an **illustrative composite scenario**, not a testimonial. A supervisor needs to raise a recurring handover problem. The first thought is: *I am making a fuss*. On checking the facts, they can name three occasions when missing information caused rework. They do not need to claim that anyone is careless or explain private feelings. Their next question becomes: *Can we agree the minimum information and owner for each handover?* The action is to bring that question and the factual examples to the next operational meeting.

Part 3: When a personal plan is not the answer

Personal routines can help you organise your next step. They cannot correct an unsafe workload, a missing role, inadequate staffing, conflict, unclear change or a lack of control over how work is done.

HSE says employers have a legal duty to protect workers from work-related stress through a risk assessment and action. It identifies six work-design areas: **demands, control, support, relationships, role and change**. ¹ This workbook does not carry out that risk assessment. It can, however, help someone prepare a factual conversation about the work conditions contributing to a decision.

The work-design check

Use this page to notice a work condition, not to measure your health or rate yourself. If you are a manager, do not collect completed pages or turn them into an employee scorecard.

Work-design area	A factual question to prepare	A possible employer or team action
Demands	What workload, deadlines, work patterns or interruptions are making this task unworkable?	Review priorities, scope, staffing, sequencing or deadlines.
Control	Which decisions about pace, method, order or breaks can I influence? Which need agreement?	Clarify decision rights, flexibility and escalation routes.
Support	What information, training, equipment, cover or feedback is missing?	Arrange practical support, training, a named contact or cover.
Relationships	Is there a work conflict, poor behaviour or blocked communication that needs a process rather than private coping?	Use agreed routes for respectful conversation, mediation or formal action where appropriate.
Role	Is ownership unclear, duplicated or in conflict?	Confirm responsibilities, priorities and the decision-maker.
Change	What change has not been explained, planned or communicated clearly enough?	Provide timely information, consultation and a workable transition plan.

A useful work-design note uses observable detail. For example: *Two people are being asked to cover a four-person shift for three weeks; the priority order has not been confirmed.* It does not need to say: *I am not resilient enough.*

Acas advises employers not to make assumptions about possible signs of poor mental health. It also notes that simple changes to work arrangements or responsibilities may be useful and that employers should consider reasonable adjustments where appropriate. ³ Keep conversations focused on the person's stated needs and the practical work issue, not an inferred diagnosis.

Worksheet 4: Separate the personal next step from the work action

The issue	A private, optional organising step	The work or team action needed	Who can decide or help?
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

A factual sentence I could use to start the conversation:

The specific decision or response I am requesting:

If the first person cannot change this, the next appropriate route is:

Capacity is part of the plan

A plan that ignores disability, illness, caring responsibilities, shift work, neurodivergence, financial pressure, limited transport, shared space, unpredictable customer demand or limited authority is not realistic. You do not need to explain the reason to use a smaller plan.

On a low-capacity day, the responsible next action may be one of these:

- ask which task can move or stop;
- request a clearer priority or deadline;
- hand over a task that someone else can do;
- make one essential contact rather than complete the whole task;
- use an existing adjustment or agreed flexibility arrangement;
- record the blockage and schedule a review when the decision-maker is available.

A smaller plan is not an inferior plan. It is a way to avoid treating an unworkable demand as a private discipline problem.

Part 4: Turn insight into one bounded action

A useful action is clear enough to start and small enough to adapt. It is not a promise that you will feel motivated, solve a whole project, or achieve a particular outcome. It is a choice about what you will do next with the control you have.

Instead of writing *sort out the client issue*, try *draft three questions for the client call and ask the director to confirm the delivery scope*. Instead of *be more organised*, try *put the two confirmed deadlines and the one unresolved dependency on tomorrow's agenda*.

The bounded-action test

Before adding an action to your plan, check that it is:

- **Specific:** another person could understand what “done for now” means.
- **Within your influence:** it describes your action, request or preparation—not another person’s behaviour.
- **Proportionate:** it fits the time and capacity available.
- **Connected:** it links to the decision or work condition, rather than becoming a generic self-improvement task.
- **Flexible:** it has a fallback if the expected time, access or support is not available.

Worksheet 5: My next action

The decision this action supports:

My next action, stated as something I can do or ask for:

“Done for now” will look like:

The first workable time or trigger for it is:

What might block it?

If that happens, my fallback is:

What I need from the workplace, another person or a decision-maker:

Review date or moment:

If the action cannot be completed

Do not turn a missed action into a score or a story about your worth. Review the conditions instead:

1. Was the action actually within your control?
2. Was the time, access, authority or support available?
3. Did a higher-priority work or caring demand intervene?
4. Does the plan need to be made smaller, handed over, rescheduled or escalated?
5. Is the more honest action now to say that the work cannot be completed safely or properly within the current constraints?

The answer may be a revised action. It may also be a work-design conversation. Both are valid outcomes of the review.

Part 5: Review events, not your worth

Reflection can be short, practical and private. You do not need a daily journal, a mood score or a long account of personal experience. Use this review after a meeting, decision, project stage or difficult work event only if it will help you choose what happens next.

A good review asks what can be learned about the work, the conditions and the next action. It does not require you to find a positive meaning in a difficult event.

Worksheet 6: A factual three-question review

1. What happened? Include only the facts that matter for the next decision.

2. What helped, hindered or remained outside my control?

3. What is the next action—or the work condition that needs to be raised?

What I will stop doing, continue doing or ask for next: Stop: Continue: Ask for:

Illustrative SME scenario: a plan meets caring responsibilities

This is an **illustrative composite scenario**, not a claimed outcome. A business owner schedules three supplier calls across a week. An unexpected caring responsibility removes two afternoons. Instead of trying to recover every task at night, the owner checks what is urgent, sends two short rescheduling

messages, delegates one quotation request and notes that the following week needs more buffer. The review is about calendar assumptions and available cover, not whether the owner showed enough commitment.

Part 6: Choose support with consent

Some decisions benefit from another perspective. You might choose a colleague, manager, mentor, union representative, trusted friend, professional coach or relevant adviser. There is no requirement to use public accountability, share goals on social media, disclose personal information at work or ask someone to monitor you.

When you do ask for support, make the request concrete. You could say:

“I am deciding between these two delivery options. Could you help me test the assumptions and identify what needs approval?”

Or:

“The workload and deadline no longer fit together. I need a priority decision, extra cover or a revised date. Which option can we agree?”

A manager can help by agreeing priorities, clarifying roles, removing blockers and following through on an agreed action. A manager should not use this workbook to infer someone's health, collect private reflections or decide whether someone is fit to work.

Part 7: A flexible 30/60/90-day work-decision plan

The following periods are review windows, not a challenge or a test. Adapt them to the length of the decision, project, shift pattern and capacity you have. You may spend longer in the first 30 days, combine stages, or pause the plan. The point is to create opportunities to review conditions and adjust—not to demand continuous improvement.

Review window	Purpose	A small action or conversation	What I need from the work system	Review point
Days 1–30	Clarify one live decision and test a realistic next action.	_____	_____	_____
Days 31–60	Check whether the action and work conditions are still workable.	_____	_____	_____
Days 61–90	Keep, adapt, stop or escalate the plan based on what happened.	_____	_____	_____

My 30/60/90-day plan

The work decision or theme I will focus on:

The value or principle I want to protect while I work on it:

My first bounded action:

The workplace condition, decision or support that also needs attention:

The person, team or route able to address that condition:

How I will keep the reflection private and proportionate:

My first review date or trigger:

What would make me pause, revise or seek a different kind of support:

When this workbook is not enough

This guide is for ordinary work decisions and planning. If distress is persistent, severe, affects day-to-day life, or you want support beyond work planning, choose an appropriate support route rather than trying to solve it through self-coaching alone.

England: the NHS mental health services page explains how to find local services. For urgent mental-health help, use NHS 111 online or call 111; the urgent-help page says callers can select the mental-health option. If someone is in danger or cannot keep themselves or someone else safe, call 999 or go to A&E. [5](#)

These are **England-specific NHS routes**. If you are elsewhere in the UK, use your national health service's current local route or emergency services. At work, a line manager, HR team, union representative, occupational-health route or relevant workplace policy may also be a practical route for resolving a work issue; that does not require personal disclosure beyond what you choose to share.

Final action plan

Before you close the workbook, complete only these lines.

The decision I will take forward is:

The next action I will take or request is:

The work-design issue I will not try to solve alone is:

The person or route I will contact, if needed, is:

I will review this on:

A good plan is not the most ambitious plan. It is one that tells the truth about the decision, the capacity available and the support or work change needed next.

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