WORKSHOP 01 / FACILITATOR GUIDE

Executive briefing on Voice Intelligence and VOP

A shared understanding and a justified next step

Experience Voice Intelligence, understand its limits and select one or two candidate areas using concrete work situations.

Duration

90 minutes including questions, on site or remote

Participants

Executive management and heads of department, up to 15 people; sponsor joins the decision

Outputs

- One or two candidate areas, each with a situation, affected roles, consequence and rationale.
- Shared terms, documented demo observations and open questions with owners.
- Sponsor and next meeting, or a reasoned decision not to continue for now.

Format and learning evidence

Orientation before a project. This is not technical acceptance, an individual quotation or a commitment on benefits. Product scope is agreed for each engagement.

Prerequisites

• Host and decision-maker are named. If the use case is already chosen, consider moving directly to format 2 or 3.

• Overmind supplies an approved demo with sample knowledge. The session does not change production configuration.

Observable completion criteria

• Management confirms candidate areas and the most important unproven assumption.

• Every next step has an owner and date. An unavailable live conversation is explicitly recorded as not experienced.

• New hints become authoritative knowledge only after domain approval and confirmed adoption in KSE.

Three parts of the kit

This guide contains the agenda, facilitation instructions, exercise debrief, sources and slide notes. Slides support the group session. Print the separate worksheets or use the editable HTML workbook.

Preparation

Before the session

• Two weeks before: use 1.1 for a 20-30 minute preliminary call. Clarify reason, industry, participants, languages, expectations and known constraints.

• Ten days before: request two approved industry examples and four demo prompts: sourced answer, follow-up, interruption and no matching source.

• Two days before: check link and access, microphone, audio, network and enabled functions. Confirm validity, concurrency and retention against the current demo tenant.

• Thirty minutes before: run and end a test call. Prepare an approved transcript as a fallback; share the access code personally and keep it out of result photographs. If no project-specific fallback is available, set out the fictional practice card on 1.2.

• Check internal start, fixed design version and guest access separately. An internal test does not open guest access. Digital surroundings provide context, not data permissions.

Materials and access

• 14 slides in 16:9; worksheets 1.1-1.5; cards, pens and sticky dots or a shared digital board.

• Demo call page with sample knowledge, headset, screen with audio and an approved fallback transcript; Overmind industry one-pagers. Worksheet 1.2 supplies a fictional fallback dialogue for rehearsal.

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:05	Welcome and purpose (5 min)	1.1	1-2
00:05-00:20	VOP and the knowledge loop (15 min)		3-4
00:20-00:35	Live conversation and observation (15 min)	1.2	5-6
00:35-00:50	Four Cs and industry examples (15 min)	1.3	7-9
00:50-01:00	Limits and human handover (10 min)	1.4	10-11
01:00-01:20	Select candidate areas (20 min)	1.3, 1.5	12-13
01:20-01:30	Decision and handover (10 min)	1.5	14

Times are elapsed from the start of each session and include scheduled breaks. A practice or testing phase between sessions is additional.

Facilitation script

01 Welcome and purpose / 5 min

Goal

Agree the purpose.

Method

Management states the reason in one minute. The facilitator explains the result and agenda, asks the group for one expectation and records open points.

Facilitator prompt

By the end we will select one or two areas or explain why we will not continue today.

Debrief

Which decision should be easier after 90 minutes?

Output

Confirmed purpose.

Materials: sheet 1.1; slides 1-2

02 VOP and the knowledge loop / 15 min

Goal

Understand terms and responsibility.

Method

Explain Voice Intelligence for three minutes, trace one question through the current VOP roles KSE, TalkTo, Voice and Frontend for six minutes. In six minutes explain a confirmed hint passing through review in overmind.talk and confirmed adoption in KSE. Two participants restate the process.

Facilitator prompt

New hints remain proposals. Domain approval and confirmed adoption in KSE are two separate pieces of evidence.

Debrief

Who in your organisation would decide whether a new hint is valid?

Output

Shared terms and a possible steward.

Materials: sheet ; slides 3-4

03 Live conversation and observation / 15 min

Goal

Observe an answer and its limits.

Method

Connect for two minutes, spend three minutes on a sourced question and follow-up, six minutes on an audience question, interruption and a question without a source, then let volunteers speak sequentially for four minutes. On 1.2 separate observation from interpretation. After three minutes of failure, switch to the labelled fallback. In rehearsal a second person reads the voice lines on 1.2. On 1.5 the sponsor identifies the claim supported by DB-4 and assigns the weekend check.

Facilitator prompt

Watch what you hear and which source supports the answer.

Debrief

What had evidence, what remained open and what would need to differ in your setting?

Output

Observation sheet or explicitly labelled fallback.

Materials: sheet 1.2; slides 5-6

04 Four Cs and industry examples / 15 min

Goal

Relate possibilities to daily work.

Method

Explain the four Cs for five minutes, map the eight TalkTo jobs for four minutes, then spend three minutes on each of two approved industry examples: current situation, voice task and human responsibility.

Facilitator prompt

Which example resembles your work and which prerequisite is missing?

Debrief

Which C would constrain the starting point most?

Output

Initial opportunities without commitments on results.

Materials: sheet 1.3; slides 7-9

05 Limits and human handover / 10 min

Goal

Distinguish uncertainty from responsibility.

Method

Spend six minutes on missing sources, contradiction, new hints, system actions and requests outside scope. Use four minutes to relate them to the demo observation and identify who should take over.

Facilitator prompt

Which answer would be unjustifiably certain, and who could resolve the question reliably?

Debrief

Is a responsible contact known or must one be named?

Output

Limits and clarification needs.

Materials: sheet 1.4; slides 10-11

06 Select candidate areas / 20 min

Goal

Condense concrete situations into one or two areas.

Method

Complete 1.3 silently for four minutes, take ten minutes to read one sentence each and group by process or area, then prioritise with two votes per person for six minutes. Management confirms the choice and names one counter-assumption.

Facilitator prompt

Describe the last real case: who needed to do what, and what was missing?

Debrief

Does the selection reflect a recurring problem or just interest in technology?

Output

One or two justified candidates.

Materials: sheet 1.3, 1.5; slides 12-13

07 Decision and handover / 10 min

Goal

Secure ownership and timing.

Method

Explain the path through formats 2 and 3 to Observe for three minutes. Spend five minutes recording sponsor, missing evidence and next dates on 1.5, then close with a comprehension check for two minutes. Deferral or stopping is a valid result.

Facilitator prompt

Who will resolve the main open question by when, and who decides afterwards?

Debrief

Can the owner repeat the next step in one sentence?

Output

Confirmed decision sheet.

Materials: sheet 1.5; slides 14

Close and follow-up

Next steps

• Same day: save decision sheet and cards, assign open questions and prepare agreed follow-up meetings.

• Provide minutes within two working days, following the existing format: reason, terms, situations, candidates, limits and next steps. Do not include unverified savings.

• Hand over situation cards, sponsor, participant group, constraints and open questions to format 2. Document a decision not to continue as well.

Pitfalls

• Demo failure: spend at most three minutes diagnosing it, then use an approved transcript. Label the fallback as a simulation and arrange a live experience separately.

• Do not present product behaviour from older documents as a fixed technical commitment. Check the current tenant.

• A new statement becomes approved knowledge only after human review. Demonstrate hint capture only when overmind.talk is actually connected.

• If management is absent, record a recommendation and arrange a decision meeting.

• The October 2026 catalogue names eight TalkTo products. Current strategy and Scoping list different sets of six. Confirm the task, source, version and product availability with Overmind.

Terms

VOP

Voice Operating Layer as the shared foundation.

Steward

Subject-matter owner who reviews and approves hints and knowledge.

TalkTo / overmind.talk

TalkTo orchestrates use. Domain knowledge review runs in overmind.talk, called Talk in older kits. Approval and confirmed KSE adoption are separate.

Worksheet debrief

1.1 Preliminary call and purpose

Spend 20-30 minutes with the host. Record roles rather than confidential personal details.

Illustrative example

Fictional example: the service lead wants a starting point for recurring questions about approved product documents.

Review criterion

Decision-maker, demo owner and purpose are confirmed before invitations.

1.2 Observe the demo

Take notes during a live conversation. After three minutes of outage record “transcript fallback; live untested” and use this fictional exchange: “Where do I report a discrepancy?” - “Which site?” - “West.” - “DB-4 §2 lists the West quality desk.” Interruption: “On weekends too?” - “There is no evidence for weekends. The shift lead checks the route.” Practice source DB-4 §2: “On weekdays the West site reports discrepancies to the West quality desk.”

Illustrative example

DB-4 §2 supports the weekday route for West. The weekend route and live response remain open. Candidate on 1.5: guidance on documented reporting routes. The service lead owns a dated check on weekend routing.

Review criterion

Mode, supported claim and an outstanding question are recorded separately. Live testing remains open when the transcript is used.

1.3 Situation card

One sheet per situation. Describe the problem before naming a solution.

Illustrative example

Fictional example: at a customer site, a service engineer searches for the valid spare-parts list and calls the central team.

Review criterion

Trigger, role, task and observable consequence are clear.

1.4 Limits and open questions

Use the fields for one question per entry. Do not guess legal or product answers.

Illustrative example

Fictional example: demo retention needs checking; the facilitator reads the current notice and asks Overmind.

Review criterion

Every question relevant to the decision has an owner and date.

1.5 Candidates and next step

Complete together and ask management to confirm. Continuing, deferring and stopping are possible.

Illustrative example

Fictional example: examine service knowledge first. The service lead sponsors it; collect three real search situations before the preliminary call.

Review criterion

One or two justified candidates or a reasoned stop, plus a confirmed next step.

Slide facilitation notes

01 Voice Intelligence and VOP

Management opens with the reason.

02 Purpose and agenda

90 minutes. Collect questions and resolve specific commitments separately.

03 The VOP foundation

Explain using one simple domain question. Agree product scope per engagement.

04 Knowledge requires approval

Ask who owns subject-matter responsibility at the client.

05 Live conversation

Check current access and separate approvals: internal start, fixed design version, guest access. Share the code personally and hang up afterwards. Internal tests do not open guest access. Label any fallback. The fictional DB-4 fallback is printed on 1.2. Check that the absence of live experience is recorded separately.

06 Demo observations

Collect observations without deriving a blanket product assessment.

07 The four Cs

Ask which prerequisite is hardest for the client.

08 TalkTo for customers and knowledge

The eight names come from the catalogue. Current strategy and Scoping contain differing lists of six. Use task examples; confirm product scope and availability with Overmind before commitments.

09 TalkTo for reports data training and processes

The eight names come from the catalogue. Current strategy and Scoping contain differing lists of six. Use task examples; confirm product scope and availability with Overmind before commitments.

10 Sources and uncertainty

Return to the observation from the demo.

11 Action and handover

Do not promise technical capabilities the demo tenant does not demonstrate.

12 Your work situation

One situation per card. Use roles rather than names.

13 Candidate areas

Justify the result through real situations rather than product preferences.

14 Sponsor and next meeting

Pricing context only: fixed Observe pilot, then Operating Base, Execution and capped verified value. Overmind approves commitments.

Sources and revision status

Materials for 2027, reviewed on 17 November 2026. Exercises and proposed criteria are newly authored facilitation materials. They do not establish technical availability or client approval.

Basis: local October 2026 catalogue and workshop materials, updated with current public Overmind content. Website product lists partly differ; confirm availability before use. Fictional examples are not client results.

Voice Operating Layer

https://overmind.one/en/voice-operating-layer

Current KSE, TalkTo, Voice and Frontend roles; separate approvals and confirmed KSE adoption.

The 4Cs of Voice Intelligence

https://overmind.one/en/the-4cs-of-voice-intelligence-effective-profitable-workflows

Operational bottleneck, usable end result, whole process, usage and limits of capacity values.

Project scoping workbook

https://overmind.one/wp-content/uploads/2026/10/Scoping_EN.html

Task boundaries, stop criteria, data permissions, case tests, baseline and assumptions instead of unverified zero values.

Local baseline

The inventory review used the October 2026 catalogues and kits 1 to 10. Current materials are in DE and EN. Product lists and interface terminology differ between the former catalogues, strategy and scoping. The review records these differences; the updated catalogue guides selection by task.

Before a client session

The facilitator checks current access, confirmed scope, language, sources, roles and approvals. Test demo limits and interfaces in the actual setting. Exact pricing and outcome commitments follow the approved quotation.