WORKSHOP 02 / FACILITATOR GUIDE

4C Opportunity Workshop

Prioritise use cases with evidence and choose the starting point

Identify the strongest operational bottlenecks, examine effort through to a usable end result and select a bounded starting point with actual users.

Duration

1 day from 09:00 to 16:15, 435 minutes including 75 minutes of breaks

Participants

6-10 people: sponsor, department and process owners, practitioners, IT; data protection and works council for relevant blocks

Outputs

• Six to ten initial candidates, five or six examined in depth and three to five prioritised with reasons.

• 4C profiles, completed candidate table, plotted priority matrix, start gates and a separate downside comparison with rationales.

• One selected starting point with TalkTo mapping, scope, exclusions, owners and handover to format 3.

Format and learning evidence

Opportunity assessment and preparation for scoping. Scores are reasoned working hypotheses, not legal risk classifications or benefit commitments.

Prerequisites

• A sponsor can decide the starting point during the decision block.

• Each participant brings three situations; initial source and system overviews are available.

• Review the current process through to a usable end result including preparation, review, handover and rework; an attractive demo alone does not justify starting.

Observable completion criteria

• A high score never makes a blocked candidate ready to start. Missing information remains unknown.

• The sponsor confirms the choice, rationale, main assumptions and next data delivery.

• The group reproduces exercise results A: 4.25 and 17; B: 3.25 and 16.25; C: 2.75 and 13.75. B remains conditional despite high impact and C remains blocked. Incomplete candidates receive no calculated rank.

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 to three weeks before: spend 30-45 minutes with the sponsor. Clarify purpose, areas, decision scope, participants and known constraints; start Pre-Scoping.

• Send 2.1 ten days before. Review situations two days before and mark missing information without preselecting candidates.

• Test the demo and tools. Check current export/import functions and product mappings; add missing coverage manually with a reference.

• Remote: split the same 435 minutes into two sessions, for example 225 and 210 minutes including breaks. Preserve handover and cards between sessions.

• Open 02_Priority_Matrix_EN.html locally and solve the fictional comparison case yourself. Switch to the blank sheet for client work. Alternatively print the appended scoring form and matrix page for each group; formulas and start gates are identical.

Materials and access

• 17 slides, seven worksheets; print multiple copies of 2.4 per candidate; cards, two voting colours and wall space or a digital board.

• Pre-Scoping Workbook 01, Scoping Workbook 02, approved demo and sample documents. Store local client files only in the agreed client location.

• 02_Priority_Matrix_EN.html: standalone offline matrix for six candidates with start gates, separate downside assumptions, plot, JSON export and print templates. The worksheet PDF appendix contains a scoring table, an actual matrix, a sensitivity check and the complete answer key.

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:15	Purpose and expectations (15 min)	2.1	1-2
00:15-00:45	Introduction and demo (30 min)		3-5
00:45-02:00	Context and situations (75 min)	2.1, 2.2, 2.4	6-7
02:00-02:15	Break (15 min)		
02:15-03:00	Code and action boundaries (45 min)	2.3, 2.4	8
03:00-03:45	Lunch break (45 min)		
03:45-04:30	Culture and user perspective (45 min)	2.3, 2.4	9
04:30-05:10	Compliance and start gates (40 min)	2.5	10
05:10-05:25	Break (15 min)		
05:25-06:15	Score impact and feasibility (50 min)	2.6	11-14
06:15-07:00	Decide starting point and handover (45 min)	2.7	15-16
07:00-07:15	Close (15 min)	2.7	17

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 Purpose and expectations / 15 min

Goal

Confirm the decision scope.

Method

Each person states an expectation. The sponsor describes decision authority; the facilitator explains problem-led work and how unknowns are recorded.

Facilitator prompt

Which decision will you own at the end of today?

Debrief

Are decision-maker and scope clear?

Output

Shared purpose.

Materials: sheet 2.1; slides 1-2

02 Introduction and demo / 30 min

Goal

Establish VOP and the four Cs as the shared basis.

Method

Spend 15 minutes on VOP, the four Cs and TalkTo jobs, then 15 minutes testing a sourced question and a question without a source with volunteers. Check demo configuration beforehand; label a fallback transcript if needed.

Facilitator prompt

What else would need clarification for your real work?

Debrief

Which observation created a need for further evidence?

Output

Shared terms.

Materials: sheet ; slides 3-5

03 Context and situations / 75 min

Goal

Form six to ten candidates from daily situations.

Method

Collect silently for ten minutes, map in turn for 25 minutes, vote for ten minutes using three relevance votes and one critical vote worth two, then spend 30 minutes forming use-case sentences. Select five or six candidates for deeper work.

Facilitator prompt

When which trigger occurs, which role needs to complete which task?

Debrief

Are trigger, role and result concrete, and is a source available?

Output

Candidates and problem map.

Materials: sheet 2.1, 2.2, 2.4; slides 6-7

04 Break / 15 min

Goal

Rest.

Method

Save the cards and resume on time.

Facilitator prompt

We resume in 15 minutes with systems.

Debrief

Output

Materials: sheet ; slides

05 Code and action boundaries / 45 min

Goal

Understand systems, access and action for each candidate.

Method

Locate sources for ten minutes, distinguish read and write access for 20 minutes, examine confirmation and recovery for ten minutes, then assign missing evidence for five minutes. Do not change integrations during the workshop.

Facilitator prompt

Should the voice answer, produce a draft or actually trigger a transaction?

Debrief

Is every planned action authorised and traceable when errors occur?

Output

System and action profile.

Materials: sheet 2.3, 2.4; slides 8

06 Lunch break / 45 min

Goal

Rest.

Method

Save the interim result and resume at the agreed time.

Facilitator prompt

We continue afterwards with user perspectives.

Debrief

Output

Materials: sheet ; slides

07 Culture and user perspective / 45 min

Goal

Assess usability and adoption for each candidate.

Method

Spend ten minutes on roles and setting, ten on language and terminology, 15 on benefits and concerns from the user perspective, and ten identifying first users and dissenting views. Do not vote on behalf of absent users.

Facilitator prompt

What would have to work after a week for people to keep using it?

Debrief

Which assumption needs testing with target users?

Output

User profile and testing needs.

Materials: sheet 2.3, 2.4; slides 9

08 Compliance and start gates / 40 min

Goal

Expose non-negotiable limits before scoring.

Method

Spend ten minutes on data and recipients, ten on prohibited answers and actions, ten on required approvals, then decide planning status on 2.5 for ten minutes: clear for further planning, conditional or blocked. Assign an owner and date to each open review.

Facilitator prompt

Which prerequisite can never be overruled by a high impact score?

Debrief

Which gate is open and what applies until it is resolved?

Output

Gate status and pending approvals.

Materials: sheet 2.5; slides 10

09 Break / 15 min

Goal

Rest.

Method

Prepare scoring materials.

Facilitator prompt

We then compare the remaining candidates.

Debrief

Output

Materials: sheet ; slides

10 Score impact and feasibility / 50 min

Goal

Create a comparable, reasoned ranking.

Method

For 10 minutes independently calculate fictional comparison A/B/C in pairs and check the appendix answer key. For 20 minutes enter client candidates with evidence, impact, four Cs and gate status in the table. Spend 10 minutes plotting the actual matrix and 10 comparing separate downside assumptions. Leave unknowns blank; conditional and blocked cases never become ready to start.

Facilitator prompt

Which candidate remains first under less favourable assumptions, and which cannot start regardless of rank?

Debrief

Would a plausible alternative assumption change the ranking?

Output

Scoring table, actual priority matrix and reasoned base/downside comparison with separate gate status.

Materials: sheet 2.6; slides 11-14

11 Decide starting point and handover / 45 min

Goal

Choose a scope with accountable ownership.

Method

Check TalkTo mapping in Pre-Scoping for 15 minutes, spend 15 minutes on the sponsor decision with explicit exclusions and 15 minutes on measurement planning and pending approvals. Verify export and do not interpret missing tool coverage as absent product need.

Facilitator prompt

Which bounded case comes first and what is explicitly excluded?

Debrief

Is the choice defensible under less favourable assumptions?

Output

Decision sheet and handover.

Materials: sheet 2.7; slides 15-16

12 Close / 15 min

Goal

Confirm results and open points.

Method

Each person gives brief feedback. Sponsor repeats the decision; facilitator states the report deadline and checks owners and dates for all open points.

Facilitator prompt

What is decided and what explicitly remains undecided?

Debrief

Could an absent colleague understand the decision from the sheet?

Output

Confirmed close.

Materials: sheet 2.7; slides 17

Close and follow-up

Next steps

• Same day: save cards, profiles, gate decisions and matrix; export client data locally and check access permissions.

• Within five working days provide an opportunity report: situation, three to five strongest cases, scoring rules, matrix, selected scope, open points and next steps.

• Hand over the use case, candidate Execution Unit, volume and time sources, baseline option and pending approvals to format 3. Review transferred workbook fields together.

Pitfalls

• A score is not approval. No permitted data basis, unauthorised access or an unresolved safety-critical action blocks the start until documented resolution.

• Unknown is not a neutral score of three. Mark it with owner and date; compare only candidates with sufficient evidence.

• 4C scales describe operational readiness. The existing broad risk indication does not replace review in format 7.

• The workshop does not pre-sell one product. Pre-Scoping supports mapping; the actual job determines the fit.

• 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

4C

Context, Code, Culture and Compliance as perspectives for each candidate.

Gate

A documented prerequisite that must be met before the next step.

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

2.1 Three everyday situations

Complete before the session. One paragraph per situation without proposing a solution.

Illustrative example

Fictional example: a shift handover ends without complete incident documentation; the next shift needs to ask again.

Review criterion

Three concrete events rather than three product requests.

2.2 Problem map and candidates

Map situations to six groups: knowledge, conversation skills, documentation, data, routine processes and customer contact. Score relevance and criticality separately.

Illustrative example

Fictional example: when a shift ends, the shift lead needs to approve a complete handover so the next team knows outstanding work.

Review criterion

Every candidate names trigger, role, task and result.

2.3 Four Cs question guide

Complete for each candidate examined in depth. Assign an owner and date to unknowns.

Illustrative example

Fictional example: the approved shift template is documented; access to the incident system remains open.

Review criterion

Every C has at least one piece of evidence or an assigned clarification.

2.4 Use-case profile

One sheet per candidate. Attach question guide 2.3.

Illustrative example

Fictional example: TalkToReport fits an approved handover; pure knowledge questions would fit TalkToKnowledge.

Review criterion

The task is small enough for a testable starting point.

2.5 Start gates and approvals

Record status per candidate: clear for further planning, conditional or blocked. None of these statuses is production approval.

Illustrative example

Fictional example: write access without a confirmed role is blocked; the candidate remains visible but does not start.

Review criterion

No unresolved hard blocker is hidden by an average score.

2.6 Scoring and priority matrix

First score A, B and C independently. Then change the facts for B: Context evidence is missing. The process owner blocks handover pending review. Clear Context, block B and record the reason. What can you decide for each case? Then use appendices A-C or the offline matrix for your own cases and downside assumptions.

Illustrative example

Fictional case: A knowledge answer 4 × (4+5+4+4)/4 = 17. B report draft 5 × (3+3+4+3)/4 = 16.25, but approval is pending. C material request 5 × (4+2+4+1)/4 = 13.75, but missing write access blocks it. The appendix contains the full base/downside comparison. In the changed case, A can proceed to planning. B loses its base score and stays blocked pending the process owner’s review. C stays blocked despite its score.

Review criterion

Table, plotted matrix and sensitivity check agree. Unknowns remain unscored; high scores never override a gate.

2.7 Starting point and handover

Decide together. Do not state prices or savings without an approved offer and measurement plan.

Illustrative example

Fictional example: one site, one handover template, report drafts only; automatic system actions remain excluded.

Review criterion

Sponsor confirms choice, limits and next meeting.

Fictional reference calculation

FICTIONAL COMPARISON CASE.

A: knowledge answer, impact 4, Context 4, Code 5, Culture 4, Compliance 4. Feasibility 17/4 = 4.25; priority 17. Status: clear for further planning; the exercise sources are approved.

B: report draft, impact 5, Cs 3/3/4/3. Feasibility 3.25; priority 16.25. Status: conditional, because domain approval of the drafting process is missing.

C: material request, impact 5, Cs 4/2/4/1. Feasibility 2.75; priority 13.75. Status: blocked, because the role has no write access.

Downside A: impact 3, Cs 3/5/3/4, feasibility 3.75, priority 11.25. B: impact 4, Cs 2/2/3/3, feasibility 2.5, priority 10. C: impact 4, Cs 3/1/3/1, feasibility 2, priority 8.

Decision: plan A first, resolve approval for B, do not start C. A fourth case with unknown Context receives no score. Scores support reasoned facilitation, not monetisation.

PDF appendix: blank candidate table, writable matrix, downside comparison and answer key. Offline file: 02_Priority_Matrix_EN.html.

Slide facilitation notes

01 4C Opportunity

Sponsor opens. 09:00-16:15 including breaks.

02 Today’s decision

Distinguish ranking from approval.

03 VOP and knowledge loop

Walk through one domain question.

04 The four Cs

Review every candidate in depth from all four perspectives.

05 Demo and observation

Label any fallback. Check current configuration.

06 Everyday situations

See 2.1 and 2.2.

07 Candidates as sentences

Bring a solution idea back to the last real case.

08 Systems and action boundaries

Do not change production connections.

09 Users and work setting

Do not assume agreement from absent users.

10 Start gates before scoring

Operational planning status, not a legal classification.

11 Scoring scale

Explain specific anchors for each C on the worksheet.

12 Impact and feasibility

Score individually first; discuss differences over one point.

13 Priority matrix

Show the PDF appendix or open 02_Priority_Matrix_EN.html. Plot example points A (4.25,4), B (3.25,5), C (2.75,5). B remains conditional and C blocked. Then use client cases. Debrief after hearing the decision. A may proceed to planning. B stays blocked even without a base score. A score under downside assumptions does not change its gate. C stays blocked.

14 Challenge the ranking

Record appendix C downside values independently of the base. A: impact 3, Cs 3/5/3/4 => 3.75 and 11.25. B: 4, Cs 2/2/3/3 => 2.5 and 10. C: 4, Cs 3/1/3/1 => 2 and 8. A remains first among clear planning cases. Sensitivity calculations are not statistical evidence.

15 TalkTo mapping

The catalogue lists eight names, the current strategy six and Scoping a different six. Derive fit from the task and current source and confirm with Overmind; tool coverage does not prove availability.

16 Starting point and boundaries

Complete 2.7 together.

17 Handover and report

Sponsor restates the decision and conditions for continuing.

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.