WORKSHEET 2.1

Three everyday situations

Collect concrete starting cases.

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

Situation one

Trigger, role, task, place and consequence.

Situation two

When did it last occur and what knowledge was missing?

Situation three

State frequency and available evidence; label estimates.

Most important question

Which decision do you expect from the workshop?

REVIEW CRITERION

Three concrete events rather than three product requests.

WORKSHEET 2.2

Problem map and candidates

Group problems without overlooking smaller areas.

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

Group and situations

Which cards belong together and which differences matter?

Weighting

Each person has three relevance votes and one critical vote worth two.

Candidates as sentences

When [trigger], [role] needs to [task], using [context], so that [result].

Selection for deeper work

Record six to ten candidates, examine five or six further and justify parked cases.

REVIEW CRITERION

Every candidate names trigger, role, task and result.

WORKSHEET 2.3

Four Cs question guide

Review all perspectives consistently.

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

Context

Which source answers the question, who owns it and which version applies?

Code

Which systems, read or write permissions, confirmation and error routes are needed?

Culture

Which users, languages, work locations, concerns and suitable test participants?

Compliance

Which data, recipients, retention, approvals and non-negotiable boundaries?

REVIEW CRITERION

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

WORKSHEET 2.4

Use-case profile

Bound one task fully.

One sheet per candidate. Attach question guide 2.3.

Task and end state

Use-case sentence, affected role, frequency and current alternative.

Knowledge systems and users

Sources, owners, system access, action and user group.

Impact hypothesis

Which work disappears or becomes faster and which evidence could show it?

Product fit and uncertainty

Explain the TalkTo mapping, name an alternative and record the main open assumption.

REVIEW CRITERION

The task is small enough for a testable starting point.

WORKSHEET 2.5

Start gates and approvals

Clarify blockers before ranking.

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

Non-negotiable boundaries

Prohibited data use, missing authorisation, unresolved critical action.

Evidence and responsible contact

Which document or decision proves or resolves the constraint?

Status and interim treatment

Do not start, plan only with test data or permit the next review; record why.

Resolution task

Owner, date, required evidence and renewed decision.

REVIEW CRITERION

No unresolved hard blocker is hidden by an average score.

WORKSHEET 2.6

Scoring and priority matrix

Make the ranking traceable.

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.

Table and evidence

Enter candidate ID, impact, Context, Code, Culture, Compliance and source in appendix A. Explain each score.

Start gates

Clear for further planning, conditional or blocked; reason, owner and date. None is production approval.

Matrix and challenge

Plot the base position in appendix B. Enter alternative impact and four C scores in appendix C and explain rank changes.

Decision

Explain the choice against the alternative. The score is a heuristic, not measured monetary value; retain gates and evidence gaps.

REVIEW CRITERION

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

WORKSHEET 2.7

Starting point and handover

Translate the sponsor decision into an assignment.

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

Selected starting point

Use-case sentence, TalkTo mapping and rationale against the alternative.

Scope and exclusions

Roles, locations, systems, language and explicitly excluded tasks.

Sponsor and data for format 3

Owners, possible Execution Unit, volumes, times and baseline source.

Next decision

Pending approvals, owner, date and condition for continuing or stopping.

REVIEW CRITERION

Sponsor confirms choice, limits and next meeting.

A Candidate scoring form

One sheet for up to six candidates. Check gates first. Leave unknowns blank. Scoring heuristic, not monetary value.

ID / task	I	Ctx	Code	Clt	Cmp	M	P	Gate	Evidence / rationale / owner / date
A								clear / conditional / blocked	
B								clear / conditional / blocked	
C								clear / conditional / blocked	
D								clear / conditional / blocked	
E								clear / conditional / blocked	
F								clear / conditional / blocked	

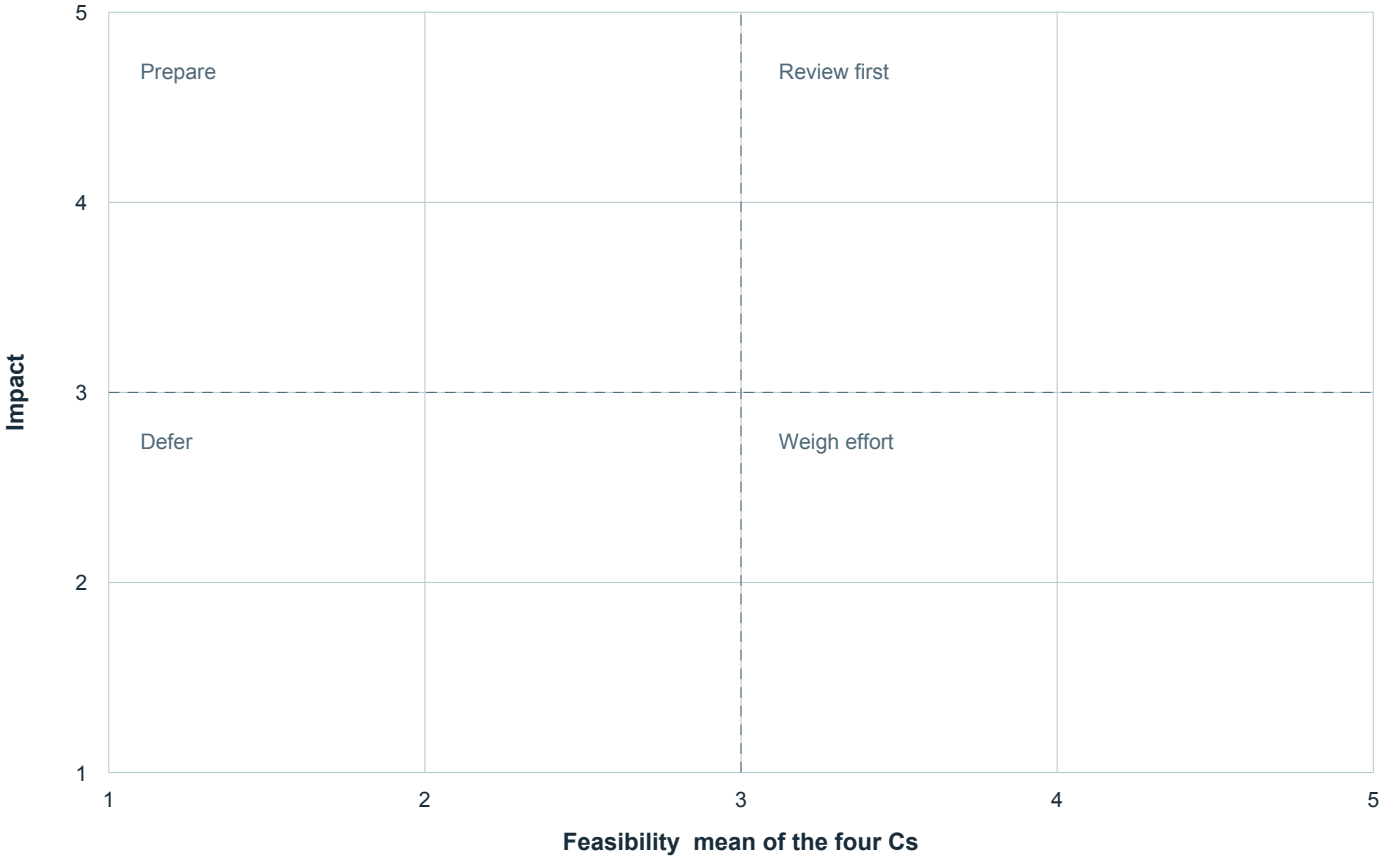
I = impact, Ctx = Context, Clt = Culture, Cmp = Compliance, M = feasibility, P = priority.

Calculation: feasibility = (Context + Code + Culture + Compliance) / 4. Priority = impact × feasibility. Any missing value prevents a score.

Clear permits further planning only. Conditional and blocked cases stay restricted regardless of score. No status on this sheet is production approval.

B Priority matrix to plot

Plot IDs A–F from table A. Offset labels for coincident points. Add ! for blocked or ? for conditional.



Choice and counter-assumption

C Separate downside comparison

No automatic haircut. Justify alternative impact and four C scores using a plausible less favourable assumption. Gates still apply.

ID	I	Ctx	Code	Clt	Cmp	M	P	Change / evidence / decision
A								
B								
C								
D								
E								
F								

Does the choice remain defensible? _____
Which new information could change the ranking? _____
Who will resolve it by when? _____

D Fully worked fictional comparison

These are training figures. They establish neither actual impact nor product availability. Calculate independently before checking this page.

Candidate	Base I / Ctx / Code / Cult / Comp	Feas. / priority	Downside I / four Cs	Feas. / priority	Decision
A Knowledge answer	4 / 4 / 5 / 4 / 4	4.25 / 17	3 / 3 / 5 / 3 / 4	3.75 / 11.25	Clear for further planning. Exercise sources reviewed.
B Report draft	5 / 3 / 3 / 4 / 3	3.25 / 16.25	4 / 2 / 2 / 3 / 3	2.50 / 10	Conditional. Drafting-process domain approval missing.
C Material request	5 / 4 / 2 / 4 / 1	2.75 / 13.75	4 / 3 / 1 / 3 / 1	2.00 / 8	Blocked. The role has no write permission.

A remains first. Resolve B’s missing approval before starting; do not start C. A fourth candidate without Context evidence is not calculated. A ranking supports reasoned discussion; blockers are not compensable score deductions.