WORKSHOP 03 / FACILITATOR GUIDE

Value and Measurement BOI

From a usable work result to verifiable value evidence

Agree the Execution Unit, complete process effort, usage, baseline and evidence. Separate capacity, cash-releasing savings and contractual valuation.

Duration

240 minutes including two breaks of 10 minutes each

Participants

3-6 people: sponsor, finance, process owner, practitioner and data owner

Outputs

• Execution Unit with end state, counting rule, duplicate treatment, denominator and evidence source.

• Measurement plan including active team time, usage, quality countermetrics, maintenance effort and evidence trail.

• Value Ledger with value class, Cost Card, Control Envelope, attribution and Confidence as a labelled contractual working draft.

• Base and downside scenarios with separate capacity and cash-releasing effects; Observe decision rule.

Format and learning evidence

Measurement planning for the Observe pilot. BOI terms from the catalogue remain the contractual framework; rules and prices require current Overmind approval. The public time calculator, Scoping business-case model and BOI contract calculator are different tools.

Prerequisites

• A bounded use case and an accountable process owner are selected.

• At least one plausible source and access route for process volume, time and output quality are named.

Observable completion criteria

• Every value has a unit, period, source, status, owner and review date.

• Usage is applied exactly once. Review and rework are not counted twice. No net value without complete maintenance costs.

• Do not infer outcome billing from the workshop or public calculator. Confirm approvals and measurement readiness separately.

• The group reproduces base: 35 hours, EUR 1,750 capacity value, EUR 1,260 adjusted value, EUR 700 ongoing effort cost, EUR 560 annual economic net effect and EUR -100 annual cash effect. Downside: 10 hours, EUR 300 adjusted value, EUR 1,050 cost, EUR -750 economic and EUR -450 cash. One-off costs are deducted separately.

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

• Request 3.1 one week before: active team time, separate waiting time, volumes, rework, usage and sources. Label each number measured, estimated or open.

• Select real sample cases from trigger to usable end result. Include preparation, conversation, review, handover, rework and knowledge maintenance.

• Prepare the current Scoping Workbook. Use the public time calculator for an initial comparison. Use the internal BOI CFO Calculator only when Overmind confirms its current version and contractual logic.

• Remove sample values or label them fictional. Prepare a base and a downside scenario; missing effort remains unknown.

• Independently solve the complete fictional appendix case and check the answer key. Leave unknown client fields explicitly blank. An hourly rate is a valuation assumption; confirmed expenditure reduction is a separate subset already included in that value.

Materials and access

• 17 slides and eight worksheets; real anonymised case evidence and data exports; Scoping Workbook chapters 6-8.

• Public time/work-value calculator for a bounded comparison. BOI CFO Calculator only as a separately approved contractual tool.

• 03_Value_Scenarios_EN.html: standalone offline scenario calculator for active team time, usage, attribution, evidence, maintenance cost and separate cash effects. The worksheet PDF includes the complete numerical case and blank calculation forms.

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:10	Purpose and measurement rules (10 min)	3.1	1-2
00:10-00:25	Distinguish value and BOI (15 min)		3-4
00:25-01:00	Map the complete process (35 min)	3.2	5-6
01:00-01:25	Execution Unit and usage (25 min)	3.3	7-8
01:25-01:35	Break (10 min)		
01:35-02:20	Value Ledger and Cost Card (45 min)	3.4, 3.5	9-11
02:20-02:55	Control Envelope and countermetrics (35 min)	3.6	12
02:55-03:05	Break (10 min)		
03:05-03:30	Baseline and evidence trail (25 min)	3.7	13-14
03:30-03:50	Scenarios and contractual boundaries (20 min)	3.5, 3.8	15-16
03:50-04:00	Observe decision (10 min)	3.8	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 measurement rules / 10 min

Goal

Confirm purpose and evidence standard.

Method

Read the use case, agree measured, estimated and open labels and assign ownership for each data group. The group names the usable end result.

Facilitator prompt

Which work must actually be completed and reviewed after the conversation?

Debrief

Are we measuring an outcome rather than a mere interaction?

Output

Measurement purpose.

Materials: sheet 3.1; slides 1-2

02 Distinguish value and BOI / 15 min

Goal

Separate capacity, expenditure and contract model.

Method

Spend five minutes distinguishing capacity and cash-releasing savings, five explaining the three tool purposes and five framing catalogue BOI terms as a separately approved contract model.

Facilitator prompt

A saved hour becomes lower expenditure only when a specific expense is removed.

Debrief

Which tool answers a time question and which answers a contract question?

Output

Shared terms and tool choice.

Materials: sheet ; slides 3-4

03 Map the complete process / 35 min

Goal

Capture current and future active team time.

Method

Clarify start and usable end state for five minutes. Map real sample cases step by step across all roles for 20 minutes. Compare the future process including preparation, review, handover, corrections and maintenance for ten minutes. Record waiting time separately.

Facilitator prompt

Which work happens before and after the visible conversation?

Debrief

Are team minutes complete without double counting?

Output

Comparable process boundaries and time basis.

Materials: sheet 3.2; slides 5-6

04 Execution Unit and usage / 25 min

Goal

Make counting and denominators reliable.

Method

Name unit candidates for five minutes, test end state, failures, repeats and handovers for ten, then define source, eligible volume and actual usage for ten. Test three disputed cases.

Facilitator prompt

Could an independent reviewer reproduce the same count from the system?

Debrief

Is the usage rate already included in the volume?

Output

Counting rule and usage measurement.

Materials: sheet 3.3; slides 7-8

05 Break / 10 min

Goal

Rest.

Method

Save interim work.

Facilitator prompt

We then calculate using agreed units.

Debrief

Output

Materials: sheet ; slides

06 Value Ledger and Cost Card / 45 min

Goal

Define non-overlapping values.

Method

Read the complete fictional case and process boundaries for five minutes. Calculate base and downside independently in pairs through annual net value and cash effects for 15. Compare the answer key for ten, checking usage once, minutes to hours, care outside case time and no adding cash release to capacity value. Record two to five client value events and unknowns for 15.

Facilitator prompt

Which specific time or expense is included in this row and where else?

Debrief

Could a value row be removed without losing the same effect?

Output

Independently checked complete exercise and first client Value Ledger/Cost Card draft.

Materials: sheet 3.4, 3.5; slides 9-11

07 Control Envelope and countermetrics / 35 min

Goal

Bound attribution and perverse incentives.

Method

Distinguish Direct, Shared and External for ten minutes. Justify attribution and uncertainty for ten. Spend five minutes on exclusions and ten defining quality and safety countermetrics with denominators. Do not copy generic percentages.

Facilitator prompt

How could the metric improve while the work gets worse?

Debrief

Which quality measure must the time gain not worsen?

Output

Attribution, Confidence, exclusions and countermetrics.

Materials: sheet 3.6; slides 12

08 Break / 10 min

Goal

Rest.

Method

Prepare measurement plan for the next block.

Facilitator prompt

Next we define what supports the numbers.

Debrief

Output

Materials: sheet ; slides

09 Baseline and evidence trail / 25 min

Goal

Define comparison and change rules.

Method

Choose a representative period for five minutes, review source, case mix, exceptions and comparator for ten, spend five on approval and freezing, and five on evidence per event. Measure the evidence effort itself.

Facilitator prompt

What could explain the change apart from the solution?

Debrief

Are the cases genuinely comparable and is evidence accessible?

Output

Baseline and evidence plan.

Materials: sheet 3.7; slides 13-14

10 Scenarios and contractual boundaries / 20 min

Goal

Distinguish gross, net and maximum exposure.

Method

Spend ten minutes building client base and downside side by side in 03_Value_Scenarios_EN.html or the print forms. For five minutes check included costs and confirmed cash release; unknown care prevents net values. For five minutes record contract questions and discuss Hurdle/Cap only in the separately approved BOI contract tool. Scenarios remain incomplete when data is missing.

Facilitator prompt

What is still missing before we can state net value or a contractual maximum?

Debrief

Are scenario, reliable evidence and quotation labelled separately?

Output

Saved scenarios and open contractual questions.

Materials: sheet 3.5, 3.8; slides 15-16

11 Observe decision / 10 min

Goal

Agree a measurable pilot and post-pilot decision.

Method

Confirm scope, roles and exclusions for five minutes. Record stop, adjust or continue criteria, decision authority and next data delivery on 3.8 for five minutes.

Facilitator prompt

What must Observe demonstrate and what would clearly require stopping?

Debrief

Are baseline, Cost Card, Control Envelope and evidence trail ready or marked open?

Output

Pilot scope and decision rule.

Materials: sheet 3.8; slides 17

Close and follow-up

Next steps

• Save the dataset, assumptions and scenario version on the same day. Update Scoping benefits, calculated benefits, KPIs and pilot decision.

• Within five working days provide the measurement plan and all missing evidence to sponsor and finance. Overmind separately approves pricing fields and contractual commitments.

• Before the measurement period jointly approve baseline, standard values, attribution, exclusions, countermetrics and change procedure.

Pitfalls

• Faster speech is not a usable end result. Compare active time through to a professionally usable result.

• Waiting time and active team time are different. Two people doing five minutes each create ten team minutes even if five minutes elapse.

• Released capacity is not an automatic budget reduction. A specific expenditure reduction requires the budget owner’s confirmation.

• No hourly rate means no euro value. Unknown maintenance effort means no evidenced net value.

• The public time calculator is not a BOI contract calculator. A blank zero field in the Scoping model does not prove zero costs.

Terms

BOI

Business Operating Intelligence, the catalogue pricing and contract framework; confirm current terms separately.

Confidence

A pre-agreed measurement uncertainty adjustment in the catalogue, not a probability of success.

Zahlungswirksam

Linked to a specific expenditure reduction confirmed by budget owners.

Worksheet debrief

3.1 Data and assumptions before the session

Complete one week beforehand. For each number state measured, estimated or open, with source, owner and date.

Illustrative example

Fictional example: ten team minutes per case are estimated; two minutes of review are already included.

Review criterion

Blank fields are not interpreted as zero.

3.2 Process comparison through to a usable result

Describe current and future processes using the same boundaries. One sheet per case type.

Illustrative example

Fictional example: 8 minutes today and 5 in future including review yield a 3 active team-minute difference, not guaranteed savings.

Review criterion

All participating roles and every effort appear exactly once.

3.3 Execution Unit and usage

Test the definition with a normal, failed and repeated case. For the base calculation, use 1,000 eligible cases per year, 70% usage, and 10 current and 7 future active team minutes per case. In the usage field, record used cases and released hours, showing your steps. Then compare with the scenario calculator.

Illustrative example

Fictional example: an approved report counts once; a technical resend creates no second unit. Check: 1,000 × 0.70 = 700 used cases. 700 × (10 − 7) ÷ 60 = 35 released hours per year.

Review criterion

An independent reviewer can reconstruct count and denominator.

3.4 Value Ledger and overlap

One event per entry. Use catalogue classes and distinguish measurement from contractual valuation. Calculate the complete base/downside appendix case; it contains all inputs, intermediate steps and expected results.

Illustrative example

Fictional example: 100 used cases × 3/60 hours × €50/hour = €250 capacity value before evidence/attribution adjustments and maintenance cost.

Review criterion

No time or expense is valued in two events.

3.5 Cost Card and cost basis

Use only agreed standard values. Without an hourly rate, show hours only. Use 03_Value_Scenarios_EN.html or the calculation tables in this PDF appendix. Record care outside case handling; do not count the same review twice.

Illustrative example

Fictional base: 1,000 cases × 70% × (10-7) minutes / 60 = 35 hours. 35 × EUR 50 × 80% attribution × 90% evidence = EUR 1,260. Care 8 × 50 + 300 external cost = EUR 700. Annual economic net effect EUR 560. Confirmed removed expense 200 minus new external expense 300 = EUR -100 cash effect. Cash release is not added as extra value.

Review criterion

Gross, ongoing cost, net and cash-releasing share are separate.

3.6 Control Envelope and countermetrics

Complete for each event. Do not copy generic percentages as fixed contractual values.

Illustrative example

Fictional example: shorter handling time is considered only alongside stable correction rates and correct handover.

Review criterion

Every time metric has a quality check with a defined population.

3.7 Baseline and evidence

Reuse for each KPI or event. Choose a representative period and document approval.

Illustrative example

Fictional example: compare by case type and site, isolate an exceptional outage, freeze baseline version before measurement.

Review criterion

A reviewer can reproduce comparison and values from accessible evidence.

3.8 Observe scope and decision

Complete with sponsor and finance. Obtain separate approval of contractual values.

Illustrative example

Fictional example: continue only when quality threshold and complete timing pass; low usage triggers adjustment rather than extrapolation.

Review criterion

Every readiness gap has an owner, date and interim limitation.

Fictional reference calculation

COMPLETE FICTIONAL EXERCISE. The process has 1,000 eligible cases per year. Current active team time is 10 minutes per case. Future case time includes preparation, conversation, case review, handover and rework. Only additional central knowledge care sits outside case time.

Base: 70% usage, future 7 minutes, EUR 50/hour, 80% attribution, 90% evidence factor. 700 used cases × 3 minutes / 60 = 35 released hours. Capacity value EUR 1,750; adjusted value 1,750 × 0.8 × 0.9 = EUR 1,260. Care 8 hours × 50 plus EUR 300 additional external annual cost = EUR 700. Annual economic net effect EUR 560.

Confirmed removed expenditure EUR 200 is a subset of capacity value, not extra benefit. Against EUR 300 new external expenditure it gives EUR -100 annual cash effect. EUR 1,000 one-off economic and cash cost gives year one EUR -440 economic and EUR -1,100 cash; over three unchanged years EUR 680 and EUR -1,300.

Downside: 40% usage, future 8.5 minutes, 80% attribution, 75% evidence, 12 care hours, EUR 450 external annual cost, no confirmed removed expense. Results: 400 used cases, 10 hours, EUR 500 capacity value, EUR 300 adjusted value, EUR 1,050 cost, EUR -750 annual economic and EUR -450 annual cash net effect. Including EUR 1,000 one-off cost: year one EUR -1,750 and EUR -1,450; three years EUR -3,250 and EUR -2,350.

Calculated usage for zero annual economic net: base 38.89%, downside 140% and therefore unreachable under these assumptions.

Limits: constant quantities, no tax, discounting, inflation, ramp-up or extra error/downtime value; not a BOI contract calculator. Unknown inputs do not produce reliable net values. Paper forms and answer key are in the PDF appendix; offline file 03_Value_Scenarios_EN.html.

Slide facilitation notes

01 Value and Measurement

Confirm use case and decision.

02 Measured estimated or open

Use the same labels on every sheet.

03 Capacity and expenditure

Do not automatically infer budget reductions from hours.

04 Three tools for different questions

BOI is not the purpose of the public time calculator.

05 The whole process

Compare current and future processes using identical boundaries.

06 Active team time and waiting time

Two people doing five minutes each create ten team minutes.

07 Execution Unit

Recount three disputed cases together.

08 Usage and population

Extrapolate only with an appropriate working calendar and case mix.

09 Catalogue value classes

Treat catalogue logic as a working draft requiring current approval.

10 Value Ledger without overlap

Check the exact contractual calculation in the approved BOI tool.

11 Cost Card and maintenance effort

Unknown effort is not zero.

12 Control Envelope and countermetrics

Do not copy generic percentages.

13 Baseline and comparison

Consider a comparator or staged start.

14 Evidence trail

Measure evidence production effort as well.

15 Base and downside scenario

Base: 700 used cases, 35 h. Adjusted value EUR 1,260 and ongoing cost EUR 700 give an annual economic net of +EUR 560. Annual cash effect: 200 − 300 = −EUR 100. Downside: 400 used cases, 10 h, economic net −EUR 750, annual cash effect 0 − 450 = −EUR 450. Usage is already included in the used-case count. Explain the spending effect using separate budget evidence. For one-off costs, see the worked solution in the guide and PDF appendix.

16 BOI and contractual boundaries

No prices or outcome billing without current Overmind approval.

17 Observe and the next decision

Record owner and date for every readiness gap.

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.

Voice Intelligence calculator

https://overmind.one/en/voice-intelligence-calculator

Active team time, no euro value without hourly rate, no evidenced net value without maintenance effort; separate from BOI contract calculator.

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.