WORKSHEET 3.1

Data and assumptions before the session

Expose measurement gaps.

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

Task and volume

Usable end state, eligible cases per period and case mix.

Active team time and waiting time

Add all roles; record elapsed time separately.

Review rework and maintenance

What is already included, what is missing and who can measure it?

Data access and finance

Source system, permissions, hourly rate if agreed and budget owner.

REVIEW CRITERION

Blank fields are not interpreted as zero.

WORKSHEET 3.2

Process comparison through to a usable result

Compare complete active time.

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

Start and finish

Trigger, eligible case and professionally usable end result.

Current process

Preparation, search, processing, review, handover and rework per role in minutes.

Future process

The same steps plus new review, corrections and ongoing maintenance.

Comparison boundaries and unknown time

Waiting separately. Add rework only when not already included in other steps.

REVIEW CRITERION

All participating roles and every effort appear exactly once.

WORKSHEET 3.3

Execution Unit and usage

Count completed work reproducibly.

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.

A unit is complete when

Objective end status and domain quality condition.

Included and excluded

Exclude failures and technical repeats. Include handovers only if agreed beforehand as an outcome.

Volume denominator and usage

All eligible cases, and those actually handled with the solution. Apply usage reduction once.

Source and recount

Case ID, system status, timestamp, deduplication key and reviewer.

REVIEW CRITERION

An independent reviewer can reconstruct count and denominator.

WORKSHEET 3.4

Value Ledger and overlap

Value events unambiguously.

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.

Event and value class

Avoided, Accelerated, Enabled or Outcome; source and counterfactual.

Quantity delta and unit

Period, usage already included yes/no, minutes or hours explicitly.

Overlap and exclusion

Which effort is already in another row? Show Enabled but do not bill it as contractual value.

Valuation rule and status

Catalogue formula: quantity × process delta × standard value × attribution × Confidence. Percentages as factors; have Overmind confirm the current rule.

REVIEW CRITERION

No time or expense is valued in two events.

WORKSHEET 3.5

Cost Card and cost basis

Separate work value and actual costs.

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.

Standard value

Unit, currency, amount, source, agreement and validity.

One-off and ongoing costs

Source preparation, integration, devices, tests, usage, support, review and knowledge maintenance.

Capacity and cash release

Which specific expense is removed, who confirms it and when?

Scenario and unknowns

Complete the base/downside appendix: used cases, released hours, adjusted capacity value, ongoing cost, annual net, one-off cost and separate cash effects. Leave unknowns blank.

REVIEW CRITERION

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

WORKSHEET 3.6

Control Envelope and countermetrics

Protect attribution and quality.

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

Control zone

A Direct Control, B Shared Control, C External. Do not attribute external events as own outcomes.

Attribution and Confidence

Share with rationale; agree measurement uncertainty separately before the period.

Exclusions and dependencies

Which decisions, resources or approvals are outside control?

Countermetric and stop rule

Formula, denominator, quality threshold, reviewer and response to violation.

REVIEW CRITERION

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

WORKSHEET 3.7

Baseline and evidence

Agree comparison before change.

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

KPI and comparison

Formula, denominator, period, case mix, normalisation and comparator if possible.

Data source and quality

Field names, completeness, access, timestamps and known biases.

Evidence per event

Case ID, source status, output review, storage and permitted access.

Approval freezing and change

Owner, version, date, reason for change and renewed agreement.

REVIEW CRITERION

A reviewer can reproduce comparison and values from accessible evidence.

WORKSHEET 3.8

Observe scope and decision

Turn measurement into a bounded pilot.

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

Scope and exclusions

Task, sites, roles, systems, languages, service hours and excluded actions.

Acceptance criteria

Usage, usable output, time basis, quality, maintenance effort and missing data.

Readiness and contract questions

Baseline, Cost Card, Control Envelope and evidence trail; confirm current Hurdle, Outcome Cap and Total Cap.

Decision rule and tasks

Stop, adjust or continue; who decides using which data and by when?

REVIEW CRITERION

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

A Complete fictional numerical case

Use identical active-process boundaries for both scenarios. Future case time includes preparation, conversation, case review, handover and rework.

Input	Base	Downside	Unit / boundary
Eligible cases / year	1,000	1,000	cases
Usage	70%	40%	%
Current active team time	10	10	min / case
Future active team time	7	8.5	min / case
Agreed hourly rate	50	50	EUR / h
Attribution	80%	80%	%
Evidence factor	90%	75%	%
Additional central care	8	12	h / year
New external annual expense	300	450	EUR / year
One-off economic cost	1,000	1,000	EUR
Confirmed removed annual expense	200	0	EUR / year
Cash portion of one-off cost	1,000	1,000	EUR

Care is additional internal time outside case handling. External annual expenses are both cost and new expenditure in this model. Confirmed removed expenditure is already a subset of valued capacity and is not added again. All figures are fictional; no contract or pricing commitment.

B Answer key with every intermediate step

Calculate independently on paper or in the offline calculator first. Money values require an agreed rate and complete costs.

Result	Base	Downside	Calculation
Used cases	700	400	Cases × usage
Released active team hours	35	10	used cases × (current - future) / 60
Capacity value EUR	1,750	500	Hours × rate
Adjusted value EUR	1,260	300	Capacity value × attribution × evidence
Additional care cost EUR	400	600	Care hours × rate
Ongoing model cost EUR	700	1,050	Care + new external expense
Annual economic net EUR	560	-750	Adjusted value - ongoing cost
Year-one economic net EUR	-440	-1,750	Annual net - one-off cost
Three-year economic net EUR	680	-3,250	3 × annual net - one-off cost
Annual cash effect EUR	-100	-450	Removed expense - new external expense
Year-one cash effect EUR	-1,100	-1,450	Annual cash - cash one-off cost
Three-year cash effect EUR	-1,300	-2,350	3 × annual cash - cash one-off cost
Usage for zero annual economic net	38.89%	140% unreachable	Cost / value at 100% usage

Annual economic net may be positive while expenditure does not fall. Unknown care stays pending and cannot produce evidenced net value. No ramp-up, tax, discounting, inflation or additional error/downtime value; not a BOI contract calculator.

C Client scenario input sheet

Record evidence, owner and period. Leave unknowns blank; use 0 only for evidenced zero. Apply usage once.

Input	Base	Downside	Unit / source / owner / date
Eligible cases / year			cases
Usage			%
Current active team time			min / case
Future active team time			min / case
Agreed hourly rate			EUR / h
Attribution			%
Evidence factor			%
Additional central care			h / year
New external annual expense			EUR / year
One-off economic cost			EUR
Confirmed removed annual expense			EUR / year
Cash portion of one-off cost			EUR

Same process boundary? _____ Care outside case time? _____ Budget evidence for removed expense? _____
Case / site / period / version: _____

D Client scenario results and decision

Assess capacity, economic net and cash effects separately. Missing inputs prevent the affected calculation.

Result	Base	Downside	Calculation / evidence
Used cases			Cases × usage
Released active team hours			used cases × (current - future) / 60
Capacity value EUR			Hours × rate
Adjusted value EUR			Capacity value × attribution × evidence
Additional care cost EUR			Care hours × rate
Ongoing model cost EUR			Care + new external expense
Annual economic net EUR			Adjusted value - ongoing cost
Year-one economic net EUR			Annual net - one-off cost
Three-year economic net EUR			3 × annual net - one-off cost
Annual cash effect EUR			Removed expense - new external expense
Year-one cash effect EUR			Annual cash - cash one-off cost
Three-year cash effect EUR			3 × annual cash - cash one-off cost
Usage for zero annual economic net			Cost / value at 100% usage

Decision stop / adjust / plan further: _____
Quality boundary, open assumption, owner and date: _____