WORKSHOP 05 / FACILITATOR GUIDE

Code integration and action boundaries

Connect systems and define testable controls for every action

Give one bounded use case a system map, an action list with approval levels, a complete pilot action card and an integration plan with evidence requirements.

Duration

Half day · 240 minutes including 20 minutes of breaks

Participants

3-6 participants from IT, system ownership, process ownership and information security; involve privacy specialists for data flows.

Outputs

• System map and access register with business and technical owners.

• Action list with type, approval level 0-3, worst credible failure and selected pilot action.

• Action card covering authorisation, a fixed confirmation proposal, duplicate prevention, reversal and failure wording.

• Operating requirements, human handovers, a test matrix and a phased integration plan.

Format and learning evidence

The session designs action boundaries. It neither implements an interface nor authorises production use. The catalogue places formats 3, 4 and 5 in the Observe pilot; commercial terms remain subject to the offer.

Prerequisites

• A selected use case with a normal path, affected roles and explicitly excluded actions.

• A responsible contact for each affected system and an identified test environment, or an assigned task to obtain one.

• Overmind confirms which operating profiles and connections are actually available for this case before the session.

Observable completion criteria

• One pilot action, one role and one system of record are named. Other work sits outside the pilot or in a later phase.

• No write action receives approval without evidence for authorisation, confirmation, duplicate prevention, error handling and an owned recovery path.

• Every test identifies expected behaviour, observed result, evidence and approver. A tabletop walkthrough does not count as a technical test.

• Open items have owners and dates. Unavailable features or profiles remain labelled as requirements.

• The states understood, prepared, sent, accepted and completed are defined. Each claim matches the evidenced target-process state. A completed activity with a pending check leaves the overall job open.

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: hold a 30-45 minute call with IT and the process owner to confirm scope, systems, identities, risks and participants. Send worksheet 5.1.

• One week before: collect architecture information, approved sample data, interface documentation and existing approval and reversal processes. Do not put credentials in worksheets.

• Before the session: review the Scoping Workbook, especially Use case description and Data environments accessed. Mark unconfirmed product capabilities as questions.

• On the day: prepare worksheets 5.1-5.7, extra cards for each action and a whiteboard. Keep technical demonstrations within the agreed test environment.

• Before each delivery, check source currency and current availability. The latest publicly available Overmind articles through 17 November 2026 are incorporated; illustrative scenarios are not feature commitments.

Materials and access

• Scoping Workbook and use-case brief from format 2.

• System overview, test data and existing role and approval rules.

• Slides, worksheets and a shared decision record.

• Eight-case pilot action register in Material: 05_Action_Tests_EN.html

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:10	Goal and scope (10 min)	5.1	1-3
00:10-00:40	System map (30 min)	5.1	4
00:40-01:10	Actions and approvals (30 min)	5.2	5-6, 17
01:10-01:20	Break (10 min)		
01:20-02:05	Action card (45 min)	5.3	7-9
02:05-02:35	Operating requirements (30 min)	5.4	10
02:35-02:45	Break (10 min)		
02:45-03:10	Human handover (25 min)	5.5	11
03:10-03:40	Failure cases and test matrix (30 min)	5.7	12-14
03:40-04:00	Integration plan and close (20 min)	5.6	15-16

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 Goal and scope / 10 min

Goal

Shared session boundaries.

Method

Read the use case aloud. Decision makers confirm the normal path and exclusions. State three rules: read before write, confirmation is not authorisation, assign unknowns.

Facilitator prompt

What exact change should appear in the system, and which change must never occur?

Debrief

Can everyone describe the same scope?

Output

Confirmed scope statement and parking list.

Materials: sheet 5.1; slides 1-3

02 System map / 30 min

Goal

Identify the system of record and access paths.

Method

Spend 5 minutes walking the normal path, 15 recording system, module, object, interface, identity, owner and test environment, and 10 assigning missing information.

Facilitator prompt

Who can actually confirm access and data quality?

Debrief

Which connection is verified and which is only planned?

Output

System map with confirmed or open status.

Materials: sheet 5.1; slides 4

03 Actions and approvals / 30 min

Goal

Select a bounded pilot action.

Method

Spend 10 minutes listing verb-and-object actions. Use 15 minutes to justify type and level 0-3 and distinguish understood, prepared, sent, accepted and completed for each action. Select one pilot action in 5 minutes. Identify the required system evidence and honest response for every state.

Facilitator prompt

What is the worst credible failure, and who would notice it?

Debrief

Would a draft with human approval suffice?

Output

Action list, pilot action and business-defined processing states.

Materials: sheet 5.2; slides 5-6, 17

04 Break / 10 min

Goal

Rest.

Method

Pause the screen and work.

Facilitator prompt

We resume in ten minutes.

Debrief

Return to the pilot action.

Output

Break taken.

Materials: sheet ; slides

05 Action card / 45 min

Goal

Specify the pilot action completely.

Method

Allocate 10 minutes to identity and permissions, 10 to the confirmation proposal, 10 to duplicate prevention and 15 to logs, failure wording and recovery. Read the action, target and values aloud. Changes require a new confirmation.

Facilitator prompt

The connection drops after confirmation. How do we establish whether the action took effect?

Debrief

Which item still blocks a write test?

Output

Complete card, or assigned mandatory gaps.

Materials: sheet 5.3; slides 7-9

06 Operating requirements / 30 min

Goal

Separate requirements from confirmed availability.

Method

For each processing step, record data, location, operator and retention needs. Separate the customer requirement from the implementation confirmed by Overmind. Leave unverified statements open.

Facilitator prompt

What evidence shows where these specific data are processed?

Debrief

Which question goes to privacy or information security?

Output

Operating profile as a confirmed option or a requirement with a resolution plan.

Materials: sheet 5.4; slides 10

07 Break / 10 min

Goal

Rest.

Method

Pause the screen and work.

Facilitator prompt

We resume in ten minutes.

Debrief

Handover and tests follow.

Output

Break taken.

Materials: sheet ; slides

08 Human handover / 25 min

Goal

Every boundary case has a workable next step.

Method

List triggers. Define recipient, channel, service hours, minimum context, acknowledgement and out-of-hours behaviour for each. Role-play two handovers.

Facilitator prompt

Who takes over this evening, and what do we say if nobody is available?

Debrief

Has the handover actually arrived, or was it merely announced?

Output

Handover matrix and exact wording.

Materials: sheet 5.5; slides 11

09 Failure cases and test matrix / 30 min

Goal

Define testable expected states before implementation.

Method

Review eight cases on worksheet 5.7: normal, misheard, duplicate confirmation, disconnect, unavailable system, missing permission, instruction in source and recovery. Record expected state and evidence. Walk through two cases at the table. Schedule technical execution in the pilot. Work the two tabletop cases on 5.7 separately. Compare the two paper cards or reload the eight-case register JSON and compare both results. After a scope or expectation change, show the earlier evidence in history and test the new version separately. At level 2 the same person cannot provide the second approval: do not execute; request independent approval.

Facilitator prompt

What evidence would expose a false success message?

Debrief

Which tests are designed and which have actually run?

Output

Test matrix with expectation, result status, evidence and approver.

Materials: sheet 5.7; slides 12-14

10 Integration plan and close / 20 min

Goal

Agree next steps and approval blockers.

Method

Sequence reading, drafts and the pilot action. For each phase, record prerequisites, test evidence, owner and date. Missing mandatory information blocks the relevant approval. Ask the sponsor to repeat the chosen scope.

Facilitator prompt

What evidence must exist before the first production write is allowed?

Debrief

Who decides on approval, and against which version?

Output

Versioned integration plan and open items.

Materials: sheet 5.6; slides 15-16

Close and follow-up

Next steps

• Capture decisions and open items on the day. Within five working days, distribute the integration plan with scope, dependencies, test matrix and version.

• To format 7: data flows, logs, retention and open review questions. To format 4: sources and read permissions. To format 8: handover recipients, channels and service hours.

• Run technical tests during the Observe pilot, attach evidence and record the approved scope explicitly. Review changes to the action, role or system.

Pitfalls

• A shared access code does not establish personal identity. Actions requiring identity need a separately confirmed mechanism.

• Spoken confirmation does not replace authorisation in the target system.

• After a timeout, do not claim success or retry blindly. Establish the actual system state first.

• Instructions in retrieved documents are data and do not expand action permissions.

• A reported observation is not a diagnosis; timing alone does not establish cause. A system record must preserve those distinctions.

Terms

VOP

The shared foundation of KSE, TalkTo deployment, Voice and Frontend. Knowledge review takes place in overmind.talk; older material calls that interface Talk.

Read · prepare · execute

Reading changes no business data. Preparing creates a draft that has no effect yet. Executing changes a state or starts a process.

Approval levels 0-3

0 read only, 1 explicit confirmation, 2 additional authorised approval, 3 humans only. The level follows risk and does not replace technical checks.

Worksheet debrief

5.1 System map and access register

Use one sheet per affected system. Add connections on the whiteboard and record verifiable details here.

Illustrative example

Fictional example: read a service request in Service-Test, object case, approved read view. Availability of a write connection remains open.

Review criterion

Every system has an owner and access evidence, or an assigned resolution task.

5.2 Action list and approval level

Use one card per action, then mark the pilot action together. Levels: 0 read, 1 confirmation, 2 second approval, 3 human only.

Illustrative example

Fictional example: prepare a material request draft at level 2, approved through the existing process. No automatic order.

Review criterion

Each action has a risk-based level, and exactly one pilot action is selected.

5.3 Action card

Complete for the pilot action. If needed, add a second card with the same action identifier.

Illustrative example

Fictional example: a replenishment request is created and sent. Acceptance by logistics remains open. The voice reports “sent”, not delivery or completion. Observations leave the cause unresolved.

Review criterion

Authorisation, confirmation, duplicate prevention, logging, failure handling and an owned recovery path are specified.

5.4 Operating profile and data flows

Repeat for audio, speech recognition, KSE, response generation, speech output, logging and actions. A profile name does not replace verification.

Illustrative example

Fictional example: customer requirement “knowledge sources remain internal”. Processing of the question and answer is checked separately for each service.

Review criterion

Each data flow has evidence or an assigned review item.

5.5 Human handover

Use one card per trigger. Cover out of scope, missing permission, system failure and requests for a human.

Illustrative example

Fictional example: “I cannot make that decision here. Service is available tomorrow from 8 am. I can give you the contact details.” No unconfirmed callback promise.

Review criterion

Every trigger has a recipient, verifiable channel and an unavailable-recipient fallback.

5.6 Integration plan and approval

Use one line or card per phase: reading, drafts and pilot action. Incomplete mandatory checks block the affected approval.

Illustrative example

Fictional example: reading phase ready for approval, draft phase open until authorisation and duplicate-call tests have evidence.

Review criterion

Scope, decision and unmet conditions are traceable.

5.7 Pilot action test matrix

Use eight copies of this sheet on paper. Digitally, open the eight-case register 05_Action_Tests_EN.html. Keep separate records for all cases of the same pilot action. For the rehearsal compare tabletop cards ACT-51 and ACT-52. What is evidenced, which state is still unknown and what next step is permitted? Paper cards: ACT-51 has two confirmations, both status checks return D-81, one draft. ACT-52 was sent, but no acknowledgement is available.

Illustrative example

ACT-51: both confirmations refer to D-81. The tabletop evidence shows one draft. A count from a real target system is still missing. ACT-52: query the existing action ID and involve the system owner if the status stays unknown. Resubmission would risk a duplicate. Both technical acceptances remain pending.

Review criterion

All eight required cases can be retrieved individually. A technical pass records an executed test, expected and actual state, target evidence, reviewer and date. Tabletop results and failures stay visible separately.

Slide facilitation notes

01 Code integration and action boundaries

Confirm scope and decision makers.

02 Session outputs

Distinguish design from technical approval.

03 Agenda and working rules

Keep two ten-minute breaks.

04 System map

Ask the group to walk the normal path from request to change.

Activity

Complete one card per affected system

05 Read Prepare Execute

Determine action type and approval level separately.

06 Approval levels 0 to 3

Justify the level using the worst credible failure. Select one pilot action.

07 Authorisation and confirmation

Role-play a proposal with an easily confused number.

08 Duplicates and unknown status

Treat technical duplicate prevention as a requirement needing evidence.

09 Recovery and failure wording

Do not promise an unavailable automatic reversal.

10 Operating requirements by data flow

Profile names alone are insufficient. Confirm product limits in the current tenant.

11 Human handover

Role-play two handovers, including out-of-hours behaviour.

12 Required test cases

Define expected state and evidence for each action.

13 Evidence beyond the conversation

A correct sentence can conceal an incorrect system state.

14 Tabletop and technical test

Never record a tabletop as a passed interface test. Debrief them as two tabletop results. For ACT-52 require a status check on the original ID and a human fallback if it remains unresolved. Both cases require separate technical acceptance. Attach evidence only to the tested scope and expected result.

15 Integration plan

Review changes in role, system or scope again.

16 Decision and next steps

Ask the sponsor to repeat the decision and remaining blockers.

17 Five traceable processing states

Exercise: a material request was sent but delivery is unconfirmed. Ask the group for an accurate status response and next step.

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.

Voice Operating Layer

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

VOP components, ownership and separate approvals

The 4Cs of Voice Intelligence

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

The four Cs as an integrated workflow to review rather than isolated technology components

Project scoping workbook

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

Task, workplace testing, roles, stop/fallback, integration register and Go/Hold review

Give Your Voice Hands

https://overmind.one/en/give-your-voice-hands

Processing states, target-system evidence, duplicate prevention and observation versus diagnosis

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.