WORKSHOP 09 / FACILITATOR GUIDE

Steward Training

Practise knowledge review and evidence personal readiness

Stewards work through ten real hints or source pairs. Each person gathers observed evidence of source decisions, questions, approval, adoption checks and withdrawal. The outcome explicitly states which tasks can already be performed independently and which still require supervision.

Duration

4 hours including two 10-minute breaks

Participants

2-6 stewards, deputies and subject-matter owners; sponsor at the close

Outputs

• Ten case decisions with reason, evidence, status and open questions

• Three to five review rules, plus steward and deputy per topic

• Evidence of approval, adoption and a repeated answer check

• A weekly review slot and a documented withdrawal route

• Personal competence matrix with observed evidence, bounded readiness status and dated pending checks.

Format and learning evidence

Training in the client's own overmind.talk tenant within the agreed TalkTo deployment. Appendix case patterns are fictional preparation examples and do not replace the ten real client cases. TalkTo denotes the deployment; overmind.talk is the content-review interface, called Talk in older kits. Check actual roles, interfaces and connections with Overmind before the session. Practise release and withdrawal in an approved isolated training state. If none is available, simulate the procedure and record SIM; this does not demonstrate operation in the actual system. Learning evidence changes no access rights.

Prerequisites

• Named stewards and deputies with tested personal accounts.

• A configured TalkTo service and connected workspace; confirm that the review inbox fits the deployed product.

• An approved source list from format 4 and ten real cases with accessible source passages.

• Operations responsible for release resets and subject-matter owners are reachable.

• Knowledge approval is separate from internal launch, fixed design assignment and guest access. This training does not open new guest access.

• Competent observers and an isolated training state are planned. Where capacity is insufficient, complete personal evidence after the session under supervision rather than infer it from a demonstration.

Observable completion criteria

• Each person has a completed matrix 9.7 covering sources/contradictions, fields/questions/labels, approval/release scope, adoption/answer test and withdrawal. Every area has an actual status and evidence or a completion date.

• S means correctly demonstrated without prompting in the recorded training state; B means supervised; O pending; SIM explained or simulated only. A successful group case is not personal evidence.

• An independent-work recommendation applies only to the recorded task and topic scope whose required areas a competent observer has confirmed as S. Otherwise status is supervised only or not yet ready for independent practice. Existing role and operational approvals are still separately required.

• Pending or delayed KSE adoption stays O with a review date. It does not complete the related personal evidence.

• No unresolved contradiction is published. Steward, deputy, operations contact and weekly review slot are named.

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

• Three weeks before, agree topics, steward, deputy and practice boundaries with the sponsor.

• One week before, select four source pairs, three corrections and three new hints or interview items. Adjust the mix with a recorded reason if needed.

• Prepare an internal expected decision, evidence and acceptable alternatives for each case. Use fictional patterns only for preparation.

• The day before, check accounts, adoption route and one test hint; provide a screen per pair and one facilitator screen.

• Before any planned release, inspect all already approved items of the topic so nothing is published unnoticed.

• Prefill matrix 9.7 per person: topic, role, permitted tasks and five evidence areas. Allocate cases with role changes. Name a competent observer for each pair assessed concurrently, or schedule separate observation times. Confirm an isolated state and responsible operations role for release/withdrawal.

Materials and access

• overmind.talk, KSE console and Voice access in the agreed tenant

• Ten client cases with origin and source version; appendix case patterns

• Worksheets 9.1-9.7, slides and operations contact

• Personal matrix 9.7; additional printable copy Material/09_Kompetenzmatrix_EN.html. Record S, B, O or SIM and evidence for every area.

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:10	Goals and safe practice boundaries (10 min)	9.1, 9.7	1-4
00:10-00:45	Trace a hint through KSE adoption (35 min)	9.1	5-6
00:45-01:25	Resolve contradictions with reasons (40 min)	9.2	7-9
01:25-01:35	Break (10 min)		
01:35-02:05	Write questions that resolve uncertainty (30 min)	9.3	10-11
02:05-02:35	Practise approval and withdrawal (30 min)	9.5, 9.7	12-13
02:35-02:45	Break (10 min)		
02:45-03:45	Work through ten real cases (60 min)	9.4, 9.7	14-16
03:45-04:00	Agree rules and review routine (15 min)	9.6, 9.7	17-18

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 Goals and safe practice boundaries / 10 min

Goal

Understand the outcome and responsibility.

Method

Explain the goal for 3 min, show roles and personal matrix 9.7 for 4 min, agree isolated training state, S/B/O/SIM and change boundaries for 3 min.

Facilitator prompt

Which change would you take responsibility for today?

Debrief

Who may approve content, and who operates the withdrawal route?

Output

Agreed practice boundaries

Materials: sheet 9.1, 9.7; slides 1-4

02 Trace a hint through KSE adoption / 35 min

Goal

Distinguish status from substantive effect.

Method

Explain the loop for 10 min, report and confirm a real hint for 10 min, trace inbox, release and adoption state together for 15 min. A demonstration does not count as personal S evidence; each person later checks adoption independently.

Facilitator prompt

How do we know the voice already answers using the new knowledge state?

Debrief

Which stage is still missing even though approval is complete?

Output

Status chain for one hint

Materials: sheet 9.1; slides 5-6

03 Resolve contradictions with reasons / 40 min

Goal

Compare scope and evidence.

Method

Show the three decision types for 10 min, apply five checks for 15 min, decide two real source pairs for 10 min, assign document maintenance for 5 min. Each person in a pair decides independently in turn; record observation and evidence in K1.

Facilitator prompt

Do both sources address the same subject in the same period?

Debrief

Would a new colleague understand the reason without asking?

Output

Two justified decisions or follow-up questions

Materials: sheet 9.2; slides 7-9

04 Break / 10 min

Goal

Short rest.

Method

Lock screens and close sensitive material.

Facilitator prompt

We resume in ten minutes.

Debrief

No content debrief.

Output

Break

Materials: sheet ; slides

05 Write questions that resolve uncertainty / 30 min

Goal

Clarify one open matter with the right person.

Method

Show missing fields for 5 min, write three follow-up questions for 15 min, peer-review and set answer route and date for 10 min. Each person formulates and routes their own question; K2 also covers uncertainty and confidentiality.

Facilitator prompt

Which single answer would make this case decidable?

Debrief

Is the question specific, blame-free and limited to one matter?

Output

Three questions with recipient and date

Materials: sheet 9.3; slides 10-11

06 Practise approval and withdrawal / 30 min

Goal

Manage the full release and withdrawal route.

Method

Demonstrate the full release check for 5 min, observe release scope, adoption check and withdrawal in the isolated state with role changes for 20 min, record K3-K5 evidence for 5 min. Only competent observation counts as evidence. Schedule unobserved or simulated steps as O or SIM.

Facilitator prompt

What enters this release besides our practice case?

Debrief

Which action prevents a withdrawn item from reappearing?

Output

Completed approval and withdrawal check

Materials: sheet 9.5, 9.7; slides 12-13

07 Break / 10 min

Goal

Rest before case practice.

Method

Prepare pairs and case allocation.

Facilitator prompt

In ten minutes you will handle the cases yourselves.

Debrief

No content debrief.

Output

Break

Materials: sheet ; slides

08 Work through ten real cases / 60 min

Goal

Make and compare decisions independently.

Method

Allocate ten cases across pairs for 5 min, work with role changes and add personal K1-K5 evidence for 35 min, compare disputed decisions against sources for 15 min, retain only sound results for 5 min. The group handles ten cases in total; extra personal variants are possible. Someone else’s case is not personal evidence.

Facilitator prompt

Show the source passage supporting your decision.

Debrief

Which difference is an error, and which is an acceptable alternative?

Output

Ten recorded case decisions

Materials: sheet 9.4, 9.7; slides 14-16

09 Agree rules and review routine / 15 min

Goal

Start routine operations with cover.

Method

Derive rules from differences for 5 min, name steward and deputy for 5 min, confirm each personal matrix with bounded readiness, pending evidence and completion dates for 5 min. Agree the first weekly review slot.

Facilitator prompt

Who takes over if the steward is absent next week?

Debrief

Which open question is due before the next review?

Output

Rules, deputy, personal readiness and evidence completion dates

Materials: sheet 9.6, 9.7; slides 17-18

Close and follow-up

Next steps

• Hand open questions and documents marked for maintenance to their owners on the same day.

• Within five working days, provide the results document with case decisions, rules, responsibilities and pending adoption checks.

• In the first weekly review slot, handle one new case with the deputy. Format 12 receives gaps, handling times and backlog.

• At the first weekly review, observe pending evidence from 9.7 specifically. Change SIM to S or B only after observing actual operation in the approved training state. Record date, evidence and observer for each change.

• Until clarified, the person works under supervision for pending tasks. The sponsor receives bounded readiness status rather than attendance alone. Recheck affected evidence after a material interface or procedure change.

Pitfalls

• A newer file supersedes an instruction only when approval, scope and replacement are established. A date alone is insufficient.

• Approved is different from adopted by KSE. Check adoption and then retest the affected answer.

• After a reset, affected items must not silently reappear in the next release.

• Do not copy confidential hints into open exercise records. Put time limits and conditions into the substantive limits.

• One case per person, an explained withdrawal route or a planned adoption check does not evidence all five task areas. Missing evidence explicitly limits independent practice.

Terms

Steward

Person responsible for reviewing and approving knowledge.

Release

Consolidated approved topic state for publication.

Übernahme bestätigt

Confirmed adoption of the release in KSE; check the substantive answer afterwards.

Worksheet debrief

9.1 Steward cheat sheet and status route

Trace five stages in the local tenant: hint, review, approval, release, confirmed KSE adoption. A person checks approval.

Illustrative example

Fictional: spare-parts topic. Steward A, deputy B. After release the answer still gives the old document number: check adoption and repeat the same test case.

Review criterion

All stages, deputy and withdrawal contact are identifiable.

9.2 Contradiction decision

Check same subject and period, safety relevance, approved source version, governing instruction and remaining uncertainty. Ask if uncertain.

Illustrative example

Fictional: two lists give different delivery locations. List A applies to the north site and B to the south site. Decision: both with a site condition, no general replacement.

Review criterion

The decision states scope, evidence and follow-up; uncertainty remains open.

9.3 Follow-up question and answer route

Use one sheet per open matter. Ask one question and explain the decision it enables.

Illustrative example

Fictional: does the new delivery address apply to every order or only to the south site? Recipient: logistics owner. Clarify by Tuesday and defer meanwhile.

Review criterion

Another specialist understands the question and required evidence.

9.4 Case decision record

Copy this sheet for each case. Pairs share ten cases; record names and confidential statements only in the approved workspace.

Illustrative example

Fictional: case 4, interview. A statement omits the variant. Ask instead of approving; record the missing variant as a missing limit.

Review criterion

Decision and evidence are traceable; every open case retains an owner.

9.5 Approval and withdrawal

Check the whole topic before publication. One practice case does not describe everything the release contains.

Illustrative example

Fictional: request a reset of release 4. Defer the affected item before release 5 so it does not reappear.

Review criterion

Adoption, answer test and protection against republication are recorded.

9.6 Review rules and deputies

Derive three to five rules from disputed cases. Agree a fixed weekly review slot.

Illustrative example

Fictional: Wednesday 09:00, 30 minutes. A reviews new hints, B deputises. Outdated sources go to owners the same day.

Review criterion

The first review slot and deputy are fixed.

9.7 Personal competence matrix and readiness

For case 5, complete one personal record on paper or in Material/09_Kompetenzmatrix_EN.html. Fictional prior records show K1-K3 were observed independently. KSE adoption is still pending and withdrawal was only explained. Choose a status, next observation and date for K4 and K5. Justify the permitted scope.

Illustrative example

Fictional prior evidence records S for K1-K3. K4 stays O until adoption is confirmed and the same subject question is retested. K5 stays SIM until withdrawal is observed in the approved training environment. Independent practice across K1-K5 is still unsupported.

Review criterion

All five areas have personal status and evidence or a completion date. Independent tasks are recommended only within the explicitly evidenced scope.

Acceptance cases and expected responses

K1 Sources and contradictions

Question

Personal observed evidence in the approved training state.

Expected response

Justify a decision using scope, approved version and source passage; assign uncertainty appropriately.

Evidence

Person, topic, source/interface version, case or operation evidence, date and competent observer. S only without prompting; B, O or SIM with next observation. Do not trigger production actions solely to obtain learning evidence.

K2 Fields, questions and labels

Question

Personal observed evidence in the approved training state.

Expected response

Recognise a missing field, route one clarifying question and preserve uncertainty/confidentiality.

Evidence

Person, topic, source/interface version, case or operation evidence, date and competent observer. S only without prompting; B, O or SIM with next observation. Do not trigger production actions solely to obtain learning evidence.

K3 Approval and release scope

Question

Personal observed evidence in the approved training state.

Expected response

Check the full topic and exclusions; personally perform traceable approval in the isolated state.

Evidence

Person, topic, source/interface version, case or operation evidence, date and competent observer. S only without prompting; B, O or SIM with next observation. Do not trigger production actions solely to obtain learning evidence.

K4 Adoption and answer test

Question

Personal observed evidence in the approved training state.

Expected response

Separate approval from KSE adoption, personally check confirmation and retest the same answer case.

Evidence

Person, topic, source/interface version, case or operation evidence, date and competent observer. S only without prompting; B, O or SIM with next observation. Do not trigger production actions solely to obtain learning evidence.

K5 Withdrawal

Question

Personal observed evidence in the approved training state.

Expected response

Carry out the pre-release route and correctly request the post-release operations action; prevent republication and verify the resulting state.

Evidence

Person, topic, source/interface version, case or operation evidence, date and competent observer. S only without prompting; B, O or SIM with next observation. Do not trigger production actions solely to obtain learning evidence.

Practice cases and debrief

1

Situation

Fictional case pattern: Same subject, newer approved version. Two real sources with the same scope conflict; one explicitly identifies the version it supersedes.

Expected response

Check approval and supersession, justify the valid version and assign outdated source maintenance.

2

Situation

Fictional case pattern: Different sites. Two delivery instructions apply at different sites.

Expected response

Both with a site condition; record unambiguous answer limits.

3

Situation

Fictional case pattern: Safety-relevant difference. An oral account differs from a current safety instruction.

Expected response

Do not independently approve a new rule. Involve the responsible specialist and instruction owner.

4

Situation

Fictional case pattern: Unclear variant. A source pair names the same product but omits the variant.

Expected response

Ask about scope. Defer until clarified.

5

Situation

Fictional case pattern: an evidenced Voice hint corrects a document number. The steward approved it, but KSE adoption is not yet confirmed.

Expected response

Keep the state approved. Do not promise a changed answer before adoption is confirmed. Then retest the same subject question.

6

Situation

Fictional case pattern: a correction hint asks to return to an old template number. The responsible specialist and the approved current source show that the old template was superseded.

Expected response

Discard the demonstrably incorrect hint with a reason. Discarded does not change published knowledge. Provide understandable feedback to the reporter.

7

Situation

Fictional case pattern: Confidential statement. A confirmed hint is marked confidential.

Expected response

Retain confidentiality and do not publish as open knowledge; clarify permitted handling.

8

Situation

Fictional case pattern: Interview with a missing limit. Situation, statement and why are populated, but exceptions are missing.

Expected response

Ask a targeted question about limits and validity where relevant.

9

Situation

Fictional case pattern: Uncertain expert statement. The person explicitly says they are uncertain about a value.

Expected response

Retain uncertainty and request corroboration or clarification; do not create certainty by rewording.

10

Situation

Fictional case pattern: Problem after publication. An approved addition causes a wrong answer after confirmed adoption.

Expected response

Record the error, request an operations reset, defer the item and check republication and the answer.

Slide facilitation notes

01 Steward Training

Welcome participants and point to real client cases. Fictional case patterns only support preparation.

02 Training outcomes

Acceptance requires observed work, not the highest approval rate.

03 Four-hour agenda

Show the detailed guide agenda.

04 Review rules

Substantive contradictions stay open until the responsible person resolves them.

05 The knowledge loop

KSE fetches the approved release. Approval alone does not yet change the voice.

06 A hint with a traceable state

Use spoken commands tested in the tenant. overmind.talk areas are labelled Wissen prüfen, Rückfragen and Bereitstellen.

07 Scope before decision

A newer file alone does not replace a governing instruction.

08 Three contradiction decisions

Explain effects on the item, document maintenance and scope for each option. Uncertainty remains a question.

09 Comparing two source pairs

Ask for the passage before discussing the decision.

Activity

Work on two real cases using sheet 9.2

10 Four fields per statement

Conditions and time limits belong in the substantive limits, not only display or sorting fields.

11 One clarifying question

Have participants write three questions and peer-check clarity.

12 Approval and publication

A release may contain more than the current practice case. Inspect the full scope before publication.

13 The withdrawal route

Confirm operations contact and procedure for this tenant.

14 Ten real cases

Each person handles at least one case; each decision is recorded centrally once.

Activity

Use sheet 9.4 for each case

15 Comparing differences

A majority vote does not replace the responsible subject-matter owner.

16 Personal evidence for every core action

Each learner uses a separate matrix. Record status, evidence, observer and follow-up date for each area. K4 stays O pending confirmed adoption and an answer test. K5 stays SIM until actual withdrawal is observed. Independent practice in all five is unsupported. A narrower scope needs individual S evidence, explicit limits and competent confirmation. Print or save the completed record as a PDF before closing.

Activity

Review personal matrix 9.7

17 The weekly review routine

Set the first specific date and adopt rules from the cases.

18 Handover to daily work

Check that everyone knows their next action.

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.

Teaching revision: personal, task-specific learning evidence and equivalent participation modes; new fictional role cases are labelled exercises. Existing product, pricing and approval boundaries remain authoritative.

Voice Operating Layer

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

TalkTo deployment and content review; question, discarded, approved and confirmed KSE adoption; separate access approvals.

Project scoping workbook

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

Topic, responsible subject-matter role, sources and open questions as deployment prerequisites.

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.