WORKSHOP 10 / FACILITATOR GUIDE

Prepare Expert Interviews

Capture experience and plan its practical transfer

Three prioritised topics receive executable interview guides. A trial interview tests questions and handling of statements. Knowledge involving practical action also receives a plan for demonstration, observation, practice and feedback.

Duration

4 hours including two 10-minute breaks

Participants

4-8 people: knowledge management or HR, subject-matter leads, two or three experts and the future steward

Outputs

- Prioritised topic list with evidenced risks and three initial topics
- Three guides with introduction, six questions, probes, limits and close
- Expert briefing with agreed benefit, time, influence and correction route
- Trial interview with observations and revised guides
- Interview and practical-transfer plan with steward, deputy and review slot

Format and learning evidence

Interviews capture statements and reasoning. By themselves they do not demonstrate practical competence. TalkTo denotes the deployment; content review takes place in overmind.talk, called Talk in older kits. Confirm current settings, access and retention for the specific project.

Prerequisites

• A concrete need and a list of critical knowledge areas exist; age is not used as a proxy for knowledge or competence.

• Experts participate voluntarily and receive work time and influence over topics and corrections.

• A steward and deputy are named; statements remain drafts until content review.

• Access, processing, information and required approvals are settled for a real trial interview.

Observable completion criteria

• The first three topics are concrete questions with expert, steward and next date.

• Each guide has open, single-focus questions covering situation, statement, why and limits.

• The trial produced at least one evidenced guide change or a justified decision to retain it.

• For practical skill, an observed exercise is planned; an interview alone is not a competence check.

• Unresolved data or participation questions have owners and dates; template text does not mark them complete.

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, clarify need, topics, experts, steward and available time. Include younger and newly joined specialists too.

• Two weeks before, prefill the topic list: concrete recurring question, knowledge holders, current documentation and known handover dates. Do not record departure rumours.

• One week before, test one guide and approved sample documents in the configured environment. Have responsible functions review the expert briefing.

• The day before, check trial audio, personal access and results route. If unavailable, the facilitator reads the guide; system testing is then completed later.

Materials and access

• Critical topics, approved material and two or three experts

• TalkTo deployment with prepared interview access or documented manual fallback

• Worksheets 10.1-10.7, three fictional guide examples and observation sheets

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:10	Goal and statement route (10 min)	10.1	1-3
00:10-00:55	Prioritise topics by knowledge risk (45 min)	10.1	4-5
00:55-01:45	Write three interview guides (50 min)	10.2, 10.8, 10.9	6-7
01:45-01:55	Break and transfer (10 min)	10.2	
01:55-02:30	Engage experts as co-designers (35 min)	10.3	8-9
02:30-03:15	Trial interview and result review (45 min)	10.4, 10.7	10-11
03:15-03:25	Break (10 min)		
03:25-04:00	Refine guides and plan transfer (35 min)	10.5, 10.6	12-14

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 statement route / 10 min

Goal

Distinguish capture, review and competence.

Method

State outcomes for 3 min, agree rules for 3 min, show the route from statement to reviewed knowledge and practice for 4 min.

Facilitator prompt

What must someone actually be able to do afterwards?

Debrief

What can the interview provide, and what needs observation?

Output

Shared expectation

Materials: sheet 10.1; slides 1-3

02 Prioritise topics by knowledge risk / 45 min

Goal

Choose three specific initial topics.

Method

Collect questions for 10 min, assess known handover dates, sole-held knowledge, documentation and impact against evidence for 20 min, compare priorities for 10 min, assign expert and steward for 5 min. Unknowns remain visibly unknown.

Facilitator prompt

Which question would be hard to answer tomorrow without this specialist?

Debrief

Does priority follow evidenced risk or an assumption?

Output

Three topics with justified priority

Materials: sheet 10.1; slides 4-5

03 Write three interview guides / 50 min

Goal

Write open questions and explicit probes.

Method

Show examples and four knowledge fields for 10 min, have three groups or pairs draft one guide each for 25 min, set duration and stops for 10 min, peer-review for 5 min.

Facilitator prompt

Tell us about the last concrete case. How did you recognise the situation?

Debrief

Which question already suggests the desired answer?

Output

Three draft guides

Materials: sheet 10.2, 10.8, 10.9; slides 6-7

04 Break and transfer / 10 min

Goal

Prepare the first guide for testing.

Method

Participants take a break. The co-facilitator transfers only the prepared guide into the agreed test environment.

Facilitator prompt

We will test this guide, not a person.

Debrief

Confirm the transferred version before starting.

Output

Test-ready guide

Materials: sheet 10.2; slides

05 Engage experts as co-designers / 35 min

Goal

Discuss benefit, time and influence concretely.

Method

Listen to experts for 10 min, agree work time and recognition for 10 min, clarify handling and correction of statements for 10 min, write briefing and date open questions for 5 min.

Facilitator prompt

What would you like to influence before your knowledge is passed on?

Debrief

Which commitment is checked, and which remains open?

Output

Agreed briefing with open items

Materials: sheet 10.3; slides 8-9

06 Trial interview and result review / 45 min

Goal

Test the guide and process with real feedback.

Method

Confirm readiness and version for 5 min, interview for 15 min, inspect confirmed statements and drafts for 15 min, hear the expert first and observers next for 10 min. If unavailable, read manually and keep the system test pending.

Facilitator prompt

Which question helped you explain your knowledge precisely?

Debrief

Which statements still need a source, limit or correction?

Output

Observations and revision needs

Materials: sheet 10.4, 10.7; slides 10-11

07 Break / 10 min

Goal

Prepare the debrief.

Method

Collect and store observation sheets appropriately.

Facilitator prompt

Next we plan practical transfer.

Debrief

No assessment of people.

Output

Break

Materials: sheet ; slides

08 Refine guides and plan transfer / 35 min

Goal

Schedule initial interviews and practical transfer.

Method

Compare observations for 10 min, adopt at most three justified changes per guide for 10 min, plan interview and practice with steward for 10 min, close open actions for 5 min.

Facilitator prompt

Where will the learner demonstrate understanding of the procedure?

Debrief

Who observes, gives feedback and reviews open statements?

Output

Three refined guides and a dated transfer plan

Materials: sheet 10.5, 10.6; slides 12-14

Close and follow-up

Next steps

• On the same day, distinguish confirmed statements, uncertainties and open questions. Do not publish test drafts as valid rules.

• Within five working days, provide the three revised guides, topic list, briefing and plan.

• Before the first real interview, confirm current settings and information/approval texts; have the steward review statements.

• Carry out practical transfer with the learner and record results in format 12 as gaps, reuse or open learning needs.

Pitfalls

• Departments are too broad as interview topics. Narrow to a recurring work situation.

• An announced retirement establishes a date; age alone does not establish knowledge value.

• Do not make interview promises before the actual data and correction route is clear.

• A plausible account is not yet an approved rule, and an approved rule is not yet a demonstrated skill.

Terms

Erfahrungswissen / experiential knowledge

Experience gained in practice whose situation, reasons and limits must be clarified.

Expertenbestätigung / expert confirmation

The expert confirms their statement. This does not replace steward approval.

Praxisübergabe / practical transfer

Planned demonstration, observation, practice and feedback for a specific task.

Worksheet debrief

10.1 Topic list and knowledge risk

Use one sheet per topic. Record departures only when confirmed and communicated. Do not score age. Known criteria can be ranked 1-3; mark unknowns as open rather than low.

Illustrative example

Fictional: spare-parts questions reach one person. A checklist is outdated and a team move is confirmed. Prioritise the topic without assessing age.

Review criterion

Three topics are selected as questions with evidenced need and owners.

10.2 Interview guide per topic

Use this sheet for topic 1 and sheets 10.8 and 10.9 for topics 2 and 3. For each topic write an opening, four to six open single-focus questions with probes, and a close. The facilitator guide contains three examples.

Illustrative example

Fictional: instead of You first ask for the type, don’t you? ask openly: Which information do you need before you can route the enquiry?

Review criterion

Each question covers one matter; situation, statement, why and limits are covered.

10.3 Expert briefing and pending approvals

This sheet does not replace legally reviewed information. Promise only confirmed procedures; send processing and participation questions to responsible functions.

Illustrative example

Fictional: twenty minutes of work time per week is confirmed. Actual retention remains open and is settled by the responsible function before the first real interview.

Review criterion

Every commitment is confirmed or clearly marked pending with a date.

10.4 Trial interview observation

Choose one observation focus per observer: process, content or experience. Link observations to a question or timestamp. Manual case: draft notes describe handover H-26 as completed. Ask an open question about the last evidenced state and invite the expert to correct the draft.

Illustrative example

Fictional: question 3 asks for two decisions at once. The answer covers only the first. Split the question.

Review criterion

A revision or justified retention is linked to observation.

10.5 Interview and review plan

Use one sheet per topic. Plan short conversations and fixed review rather than letting drafts accumulate.

Illustrative example

Fictional: service-enquiry topic, first interview Tuesday, review Thursday, feedback to expert Friday.

Review criterion

All three topics have dated interview, review and feedback.

10.6 Practical knowledge transfer

Complete for action-related knowledge alongside the interview. Have the expert demonstrate, observe together, let the learner practise and give feedback. The responsible specialist sets safe practice conditions.

Illustrative example

Fictional: route a service enquiry in a test system. The expert explains their criteria, the learner handles a second anonymised case and receives feedback.

Review criterion

Practical skill is observed; an interview does not replace that observation.

10.7 Statement, correction and approval status

Complete for one important item from the trial. Expert confirmation and content approval are separate steps. For H-26 retain both the draft wording and the correction. Check source evidence, content approval and KSE adoption separately.

Illustrative example

Fictional: the expert confirms their description. The steward still needs the current routing policy before approval. State remains question.

Review criterion

Draft, expert confirmation, approval and adoption are recorded separately.

10.8 Interview guide for topic 2

Use topic 2 from sheet 10.1. Give this copy its own title and version. Write four to six open, single-focus questions with probes, and agree on a close.

Illustrative example

Fictional: instead of You first ask for the type, don’t you? ask openly: Which information do you need before you can route the enquiry?

Review criterion

Each question covers one matter; situation, statement, why and limits are covered.

10.9 Interview guide for topic 3

Use topic 3 from sheet 10.1. Give this copy its own title and version. Write four to six open, single-focus questions with probes, and agree on a close.

Illustrative example

Fictional: instead of You first ask for the type, don’t you? ask openly: Which information do you need before you can route the enquiry?

Review criterion

Each question covers one matter; situation, statement, why and limits are covered.

Practice cases and debrief

H-26 · Private expert response

Situation

Read only to the person playing the expert. The learner uses 10.4 and 10.7.

Exercise content

When asked about the last state, say “I sent H-26 to service.” When asked about confirmation, say “I haven’t seen an acceptance.” Do not invent any system evidence.

When the draft says “completed”, the expert corrects it to “Sent; acceptance pending.” Record which question brought this out. The learner then revises the question in the selected guide.

Evidence

The expert confirms the corrected wording. Content approval and KSE adoption are each still open for H-26. The manual exercise does not test a system.

Three interview patterns

Fictional example 1: Route a spare-parts enquiry

Introduction

We are collecting your experience of the information needed to route a spare-parts enquiry. Please omit client and personal names. Your statements remain drafts for content review.

Questions

1. Think of the last enquiry that was difficult to route. What was the situation? Probe: which information was missing?

2. How do you recognise the responsible department? Probe: which source helps you route it?

3. Which information do you clarify first? Probe: why is it decisive?

4. Which exception occurs often? Probe: how is it recognised and to whom do you hand it over?

5. Which routing mistake should new colleagues avoid? Probe: how can it be spotted early?

6. When is the information insufficient to route the enquiry? Probe: which question or specialist is then needed?

Closing

Thank you. Please confirm or correct the summary. The steward reviews statements and sources. For practice, route an anonymised test case with a learner.

Boundaries

No technical part approval and no promise about compatibility, availability or price. The exercise concerns routing enquiries.

Fictional example 2: Clarify a price objection in a consultation

Introduction

Today we explore how you understand the reason behind a price objection. We are collecting conversation experience, not new price or outcome promises. Please use examples without client names.

Questions

1. Recall a specific price objection. What did the person say? Probe: at what point in the conversation?

2. How do you clarify the basis of comparison? Probe: which open question helped?

3. Which information mattered for your explanation? Probe: where was it documented and approved?

4. How do you recognise when more explanation is unhelpful? Probe: how do you agree the next step?

5. Which wording would you advise new colleagues to avoid? Probe: what might the person misunderstand?

6. Which price or service question do you escalate? Probe: who may approve a commitment?

Closing

Thank you. The summary is reviewed as a draft. In a follow-up role-play, a learner clarifies a second fictional objection and receives feedback.

Boundaries

Do not derive discount rules, success promises or contract interpretations from one experience. Prices and outcome commitments require responsible approval.

Fictional example 3: Hand an open case to the next shift

Introduction

We are collecting the information that makes an open office or service task clear to the next shift. This concerns information handover, not approval of technical work.

Questions

1. Think of your last open handover. What did the next shift need to know? Probe: what was confirmed and what remained open?

2. How do you recognise an unfinished case? Probe: which status provides evidence?

3. Which source passage do you include? Probe: how does the next person recognise the correct version?

4. How do you phrase the next task? Probe: who owns it and when is feedback needed?

5. Which information was once lost? Probe: which check prevents recurrence?

6. When is a direct conversation needed? Probe: who is the next contact when ownership is unclear?

Closing

Thank you. We review the summary and status terms. A learner then prepares a handover for an anonymised test case and seeks feedback.

Boundaries

No safety or operational approval. Process personal and client data only under the rules agreed for the deployment.

Slide facilitation notes

01 Prepare Expert Interviews

Plan capture and practical transfer together from the start.

02 Half-day outcomes

Interview participation does not automatically approve content.

03 The route of a statement

TalkTo denotes the deployment, overmind.talk the content-review interface. Actual screens and connections are confirmed in the project.

04 Knowledge with a concrete need

No departure rumours. Age does not substitute for assessment of knowledge or competence.

05 Three initial topics

Unknown information stays marked and receives a clarification action.

Activity

Use sheet 10.1 per topic

06 Four knowledge fields

Ask about a recent concrete case before collecting general rules.

07 The interview guide

Twelve minutes is a planning value for short interviews, not a newly promised product limit.

Activity

Complete one guide per topic on 10.2, 10.8 and 10.9. Choose one guide for the trial.

08 Experts co-design the transfer

Ask experts about expectations first. Make only commitments the organisation can honour.

09 Handling statements

Have data processing, access and deletion checked for the specific project.

10 The trial interview

Use H-26 on 10.4 for the manual trial. Give the expert the private response in the facilitator guide. Respond after an open question and allow the expert to correct the draft.

Activity

Record observations on sheet 10.4

11 One evidenced improvement

A manual fallback can test the guide, while the system test remains pending.

12 Demonstrate and practise knowledge

An interview alone does not transfer practical competence. The responsible specialist chooses a safe exercise.

13 Interview and transfer plan

Plan three topics fully instead of collecting many without commitments.

14 Next action

Every open action receives a person, date and acceptance check.

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

Current roles of KSE, TalkTo, Voice and Frontend; approval versus KSE adoption.

Knowledge transfer between experienced staff and learners

https://overmind.one/en/silver-agers-why-companies-should-arrange-knowledge-transfer-early

Experts as co-designers, time and recognition, correction route and practical transfer alongside interviews.

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.