WORKSHOP 12 / FACILITATOR GUIDE

Value and Knowledge Review

Four views of impact, effort and future scope

Each quarter, review whether the deployment helps with the same defined task, is actually used and justifies total effort. The group decides scope and specific actions.

Duration

2 hours 30 minutes including a 10-minute break; mid-length variant of the catalogue’s 2-3-hour range

Participants

Sponsor, CFO or controlling, process owners, steward and operations or contract owners as needed

Outputs

- Four views with outcome, evidence and explicit data gaps
- Action list with owner, date and acceptance criterion
- Recorded decision: retain, specifically change, limit scope or investigate expansion
- Evidenced basis for renewal or contract discussion without automatic commitment

Format and learning evidence

Four views: finance, operations, contract and knowledge. The public Voice Intelligence calculator is an initial time and labour-value comparison, not a BOI CFO contract calculator. Assess contractual values only under agreed BOI rules, the actual Value Ledger and approved scenarios.

Prerequisites

• A bounded use case, review period, baseline and responsible data roles are known.

• Volumes, actual use, quality, rework and review and maintenance effort are available as measurements or visibly marked gaps.

• The governing contract version and agreed BOI measurement and attribution rules are available for contractual decisions.

• User and steward feedback is summarised without unnecessary personal details.

Observable completion criteria

• All four views are recorded with evidence or as open data gaps.

• No net impact is claimed when additional review, maintenance or rework effort is missing.

• Released capacity and avoided spending are separate; a time gain is not counted twice.

• The decision states scope, conditions, owners and next review date.

• Source and conversation changes receive responsible roles and a reviewable change version.

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, set scope and counting units matching the baseline; mark changes to process, case mix and source versions.

• One week before, send a data pack: eligible cases, used cases, time to usable result, quality, correction, handover, review and maintenance.

• CFO or controlling checks costs, attribution and potential double counting. Show released capacity separately from expenses actually avoided.

• Steward brings unanswered questions, backlog, source conflicts, approvals and pending KSE adoptions. Champions add recurring helpful or obstructive work situations.

• Before the meeting, clarify the sponsor’s decision authority and open contract issues. Do not replace missing data with unlabelled estimates.

Materials and access

• Comparable baseline and current process report with evidence sources

• Voice/KSE/TalkTo reports and content-review state in overmind.talk where agreed for the deployment

• Governing contract, BOI Value Ledger and approved CFO scenario where available

• Worksheets 12.1-12.7 and user feedback

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:10	Period and decision question (10 min)	12.1	1-3
00:10-00:40	Finance and total effort (30 min)	12.2	4-5
00:40-01:05	Operations and actual use (25 min)	12.3	6-7
01:05-01:15	Break (10 min)		
01:15-01:40	Knowledge and handled feedback (25 min)	12.5	8-9
01:40-02:00	Contract and agreed limits (20 min)	12.4	10
02:00-02:20	Decide scope and actions (20 min)	12.6, 12.7	11
02:20-02:30	Close and next review (10 min)	12.6	12

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 Period and decision question / 10 min

Goal

Set a shared comparison frame.

Method

State goal and decision for 3 min, confirm scope and period for 4 min, visibly mark data gaps for 3 min.

Facilitator prompt

Which specific scope are we deciding today?

Debrief

Which assumption could alter the comparison?

Output

Confirmed review frame

Materials: sheet 12.1; slides 1-3

02 Finance and total effort / 30 min

Goal

Evidence impact and avoid double counting.

Method

Compare volumes, use and time with baseline for 10 min, add review, maintenance and rework for 10 min, separate capacity and actual spending impact for 5 min, mark BOI evidence and open attribution for 5 min.

Facilitator prompt

Which additional effort appears elsewhere?

Debrief

Is this time gain already included in another item?

Output

Finance view with evidence and limits

Materials: sheet 12.2; slides 4-5

03 Operations and actual use / 25 min

Goal

Assess everyday task success and limits.

Method

Inspect actual use and usable results for 10 min, discuss corrections, errors, handovers and user barriers for 10 min, assign the main operational action for 5 min.

Facilitator prompt

For which task do people choose this route again, and why?

Debrief

Which friction creates additional effort?

Output

Operations view and prioritised improvement

Materials: sheet 12.3; slides 6-7

04 Break / 10 min

Goal

Prepare the next decisions.

Method

Close sensitive reports; collect outstanding data questions.

Facilitator prompt

We continue with knowledge and contract.

Debrief

No content debrief.

Output

Break

Materials: sheet ; slides

05 Knowledge and handled feedback / 25 min

Goal

Review gaps, maintenance and return flow.

Method

Sort unanswered questions and source conflicts for 10 min, distinguish questions, discarded and approved hints and confirmed adoptions for 10 min, set owners and maintenance effort for 5 min.

Facilitator prompt

Which hint was reviewed and demonstrably entered the confirmed knowledge state?

Debrief

Where are users still waiting without feedback?

Output

Knowledge view with source and feedback actions

Materials: sheet 12.5; slides 8-9

06 Contract and agreed limits / 20 min

Goal

Separate contractual position from measurement and expansion ideas.

Method

Confirm governing version and scope for 5 min, check agreed measurement, Control Envelope, Hurdle and Cap against actual contract material for 10 min, send open questions to responsible roles for 5 min. Do not add unagreed values.

Facilitator prompt

Which rule is actually agreed and which is only a scenario?

Debrief

Does this change need new content or contractual approval?

Output

Contract view and open clarifications

Materials: sheet 12.4; slides 10

07 Decide scope and actions / 20 min

Goal

Translate four views into a reasoned decision.

Method

Combine evidence and gaps for 5 min, decide to retain, change, limit or investigate expansion for 10 min, assign owner, date and acceptance to actions for 5 min.

Facilitator prompt

Which condition must hold before we expand scope?

Debrief

Which decision remains open because data is missing?

Output

Scope decision and action list

Materials: sheet 12.6, 12.7; slides 11

08 Close and next review / 10 min

Goal

Secure concrete next steps.

Method

Have each responsible role confirm its next action for 5 min; agree documentation and next review for 5 min.

Facilitator prompt

What evidence will we see at the next review?

Debrief

Are open items and decision conditions clear to everyone?

Output

Confirmed actions and date

Materials: sheet 12.6; slides 12

Close and follow-up

Next steps

• Confirm decisions, outstanding data evidence and actions on the same day.

• Within five working days, provide the results document with four views, actions and scope decision.

• Have changes to knowledge, conversation profile or access reviewed and approved by the responsible roles.

• Before the next quarterly review, check action completion and outstanding evidence. Agree an earlier review for critical quality issues.

Pitfalls

• High conversation counts prove neither task success nor economic impact. Separate eligible and actually used cases.

• A changed case mix or process can distort baseline comparison. Disclose comparison limits.

• A labour value from the public calculator is not an invoice, contractual cap or confirmed Verified Outcome.

• A new TalkTo approach is an investigation with scope and prerequisites; a product label does not promise availability.

Terms

BOI

Catalogue model with Operating Base, Execution and Verified Outcome; apply only under the specific agreement.

Freie Kapazität / released capacity

Available work time whose actual use is assessed separately.

Doppelzählung / double counting

The same effect is included more than once as benefit or effort.

Worksheet debrief

12.1 Review frame and data state

Prefill before the meeting and confirm at the opening. Clearly distinguish measurement, estimate and data gap.

Illustrative example

Fictional: internal service-information review, October to December. A new site only joined in December; show its case mix separately.

Review criterion

Counting unit, comparison limits and data owners are confirmed.

12.2 Finance and full process effort

Fictional monthly review R12-N (March, internal North service desk). Of 100 eligible cases, 60 were handled using the service. At comparable case mix, total active time fell from 12 to 9 minutes per handled case, including case review and rework. Separate monthly knowledge upkeep is initially unknown. Record an initial finding.

Illustrative example

R12-N: 60 × (12 − 9) = 180 gross minutes. Net is initially pending. After M12 adds 60 minutes of central upkeep, 120 minutes or 2 team hours remain for March. Conversation and rework are already included. No spending evidence was supplied.

Review criterion

Measurement, additional effort, attribution and benefit type are visibly separate.

12.3 Operations and useful use

Link conversation counts to task success and feedback. A justified human handover can be a correct outcome. R12-N: 52 of 60 handled cases were usable on first pass, including 4 confirmed handovers. Eight needed rework; its active time is included in the monthly figure.

Illustrative example

Fictional: many questions but repeated manual re-entry. Check handover quality before recommending expansion.

Review criterion

One improvement concerns task success and is checkable.

12.4 Contract and BOI clarification

Use only the governing contract and approved calculation versions. The public time calculator and contract calculation are different tools. R12-N: the fictional agreement covers internal North enquiries only. No evidence for expansion, BOI recalculation or a spending reduction is supplied.

Illustrative example

Fictional: the public calculator shows labour value. The approved CFO scenario is missing for a contractual assessment; leave the question pending.

Review criterion

Agreement, scenario and open question are unambiguous.

12.5 Knowledge, sources and feedback

Group gaps without assessing individuals. Record approval and KSE adoption separately. R12-N: three knowledge changes have content approval. KSE adoption is confirmed for two; the third confirmation is outstanding.

Illustrative example

Fictional: three hints are approved but one adoption is pending. Report only confirmed knowledge states as available.

Review criterion

Each prioritised gap has an owner, next action and date.

12.6 Actions and scope decision

Read all four views first. Missing evidence limits the decision and becomes an action. For R12-N cite each finding from 12.2-12.5. Which scope is justified today? Name the next evidence item and a review date.

Illustrative example

Fictional: retain scope. Resolve handover errors first; reconsider expansion after evidenced quality and complete maintenance effort.

Review criterion

Decision, conditions and actions are confirmed.

12.7 Evidence check before expansion

Describe one next task. Product labels help classification but do not replace confirmation of scope or availability.

Illustrative example

Fictional: prepare a structured report after internal information. First test target system, confirmation and duplicate calls; do not promise automatic submission.

Review criterion

The next step is a checkable assignment with bounded scope.

Slide facilitation notes

01 Value and Knowledge Review

This is the mid-length 2.5-hour version of the catalogue range.

02 Review outcome

Do not assume expansion. Retaining, changing or limiting are valid outcomes.

03 Comparison frame

Case mix, process changes and source versions may limit comparison.

04 Finance and the whole process

Release M12 only after the initial finding: “For March, 60 minutes of central knowledge upkeep were recorded. There was no other additional effort within the defined scope.” Case rework is already in the nine minutes. Gross 180 minutes; with M12 the capacity effect is 120 minutes. Spending remains unverified.

Activity

Record the first finding on 12.2. Which conclusion needs another record?

05 Capacity and spending impact

Labour value is not automatically cash savings or confirmed contractual value.

06 Operations and task success

A justified human handover can be a correct result.

07 Recurring benefit

Conversation count alone does not prove a workable routine.

08 Knowledge and maintenance

Feed actual effort back into the finance view.

09 Approval and KSE adoption

Report only confirmed knowledge states as available.

10 Contract and calculation basis

Do not invent formulas or contractual values in the workshop.

11 Scope and actions

Limit decisions when data is missing and plan evidence.

Activity

Connect the four R12-N findings on 12.6. Record a reasoned action, the outstanding confirmation and a review date.

12 Next review date

Responsible roles state their next specific 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.

The 4Cs of Voice Intelligence

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

Actual use, the full workflow including additional effort, released capacity and prevention of double counting.

How Voice Intelligence Becomes a Habit

https://overmind.one/en/culture-how-voice-intelligence-becomes-a-habit

Recurring benefit, team routines and visible feedback on contributions.

Voice Operating Layer

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

Check approval separately from confirmed KSE adoption.

Voice Intelligence calculator

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

Distinguish the public time/labour-value comparison from BOI contractual calculation.

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.