WORKSHEET 12.1

Review frame and data state

Set a comparable review frame.

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

Task, scope and period

Use case, included teams, counting unit and review period.

Baseline and changes

Baseline period, case mix, process, source or version changes.

Evidence and data gaps

Source, owner, date, measured/estimated/pending.

Decision question

Which scope and action should be decided today?

REVIEW CRITERION

Counting unit, comparison limits and data owners are confirmed.

WORKSHEET 12.2

Finance and full process effort

Compare evidenced benefit and 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.

Volume, use and usable result

Eligible cases, actually used cases and usable results with evidence.

Time and additional effort

Time difference per handled case and gross hours with units. Keep the initial finding. Add the later upkeep record and revised finding separately.

Capacity and spending

What is released? How can it be used? Which spending was actually avoided, and who confirmed it?

Attribution and double counting

Value Ledger evidence, comparison limit, impact already included, missing data.

REVIEW CRITERION

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

WORKSHEET 12.3

Operations and useful use

Assess results in the actual workflow.

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.

Actual tasks and use

Which task, occasion and user group? Eligible and used cases.

Quality and state

Completeness, corrections, interruptions, confirmed handovers and errors.

Experienced benefit and barriers

Feedback from different roles; time, noise, terminology, duplicate work or missing feedback.

Operational action

Issue, owner, date and observable outcome.

REVIEW CRITERION

One improvement concerns task success and is checkable.

WORKSHEET 12.4

Contract and BOI clarification

Check the rules actually agreed.

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.

Governing scope and version

Contract, version, term, responsible approval and deployment scope.

Measurement and limits

Agreed counting unit, attribution, Control Envelope, countermetrics and open deviations.

BOI components and scenario

Check Operating Base, Execution, Verified Outcome, Hurdle and Cap only under the existing agreement.

Open contract question

Question, owner, required evidence, date. Do not create a new price or outcome commitment in the notes.

REVIEW CRITERION

Agreement, scenario and open question are unambiguous.

WORKSHEET 12.5

Knowledge, sources and feedback

Review maintenance needs and confirmed return flow.

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.

Knowledge gaps and source conflicts

Unanswered question, source, scope and impact.

Hints and states

Question, discarded, approved, adoption confirmed; pending duration and required clarification.

Maintenance effort and ownership

Steward, document owner, deputy, effort and review slot.

Feedback and reuse

Who learns what happened to the hint? Where did reviewed knowledge support another task?

REVIEW CRITERION

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

WORKSHEET 12.6

Actions and scope decision

Derive a clear decision from the review.

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.

Decision and scope

Retain, specifically change, limit or investigate expansion. What exactly is included?

Reason and conditions

Supporting evidence, remaining uncertainty and prerequisite for further approval.

Actions

Per action: owner, date, acceptance criterion and required approval.

Next review

Date, evidence to supply and deciding role.

REVIEW CRITERION

Decision, conditions and actions are confirmed.

WORKSHEET 12.7

Evidence check before expansion

Frame an expansion idea as a bounded investigation.

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

Next task and need

Work situation, user group, frequency and expected usable result.

Prerequisites across the four Cs

Knowledge and maintenance, technical connection, user fit, data and permissions.

Evidence and open hypothesis

What is measured? What must a bounded pilot still demonstrate?

Investigation and decision

Owner, discussion with Overmind, effort, date and next decision.

REVIEW CRITERION

The next step is a checkable assignment with bounded scope.