WORKSHEET 13.1

Facilitation scope and approvals

Clarify roles and boundaries before client sessions.

Record the four catalogue formats. Keep different approvals explicitly separate. Named facilitation scope needs format-specific evidence in 13.7; attendance is insufficient.

My four formats

1 Executive Briefing, 2 4C Opportunity, 6 Culture and Social Coding, 11 Team Launch. Which excerpt will I practise?

Content and technical responsibility

Steward reviews knowledge; operations confirms connections. Distinguish TalkTo deployment and review in overmind.talk.

Three separate deployment approvals

Internal launch, fixed design version and guest access: responsible role and evidence for each.

Commercial boundary

Overmind approves prices and outcome commitments. Record an open client question with recipient and date.

REVIEW CRITERION

No role or approval is inferred from attendance alone.

WORKSHEET 13.2

Demonstration with fallback

Prepare a reliable and honest demonstration.

Test before every client session. The demo shows an agreed excerpt, not all product capabilities.

Goal and checked questions

Two evidenced questions, one limit and one correction with expected answer.

Access and data

Approved demo deployment, sample data, test time, audio and current capacity. Do not write secret codes here.

State and limits

What is understood, prepared, approved or adopted? Which result is explicitly not promised?

Fallback script

End the failed connection, state the outage openly, show the prepared dialogue manually, complete system testing later.

REVIEW CRITERION

Demo and fallback have clear limits, state and completion route.

WORKSHEET 13.3

Facilitation plan per format

Translate a kit into concrete facilitation steps.

Copy four times for formats 1, 2, 6 and 11. Use full duration and outcome from each kit; separately mark the practice excerpt. A completed plan records preparation, not observed delivery.

Format, goal and output

Client context, participants, full duration and checkable output.

My facilitation excerpt

Minutes, task, opening wording, material and worksheet.

Participation and clarification

How do quiet or sceptical people contribute? Which claim needs evidence or parking?

Close and handover

Capture output, open action with owner and date, next kit step.

REVIEW CRITERION

The excerpt ends with an output and fits the complete format.

WORKSHEET 13.4

Observe teachback

Ground feedback in observed behaviour.

Observe six minutes of facilitation and give three minutes of feedback. Use the rubric; avoid broad personality judgements.

Assignment and observed moment

Format 1, 2, 6 or 11; excerpt, goal, observer role and specific action with time reference.

What worked independently

Clear assignment, participation, limits, uncertainty handling, time and output.

Where help was needed

Observation, effect and useful alternative.

Next learning action

One specific repeat exercise, support, date and repeated observation.

REVIEW CRITERION

Observed criteria, evidence and next practice are linked to the correct format. Unobserved criteria remain pending.

WORKSHEET 13.5

Claims check and source status

Explain new development and outlook accurately.

Check each capability or impact claim against its source and the specific project scope. Do not treat a demo as a general commitment.

Planned client claim

Exact wording and what the client might infer.

Source and status

Source, date; evidenced, project-dependent, illustrative idea or outlook.

Supported wording

What does the source support? Which prerequisite or uncertainty must be stated?

Approval and open question

Responsible Overmind role, evidence needed, date.

REVIEW CRITERION

The claim is no stronger than its source, project scope and approval.

WORKSHEET 13.6

First joint client session

Plan the separate practical step concretely.

Agree with Overmind after training. Have responsible roles approve client scope and commercial commitments.

Client, need and format

One of formats 1, 2, 6 or 11; date or next scheduling action, goal and participants.

Roles and excerpts

What does the partner facilitate? What does Overmind handle? Who records and observes?

Preparation and approvals

Client examples, data, demo, fallback, approved claims/proposal version and pending approvals.

Debrief and format evidence

Which core blocks were personally facilitated? Add evidence and observer to that format’s row in 13.7; leave the rest pending.

REVIEW CRITERION

One specific format has roles, observation and debrief planned; this establishes no evidence for other formats.

WORKSHEET 13.7

Personal format matrix and next delivery

Separate preparation, partial evidence and demonstrated delivery scope per format.

Record formats separately. Compare a prepared plan, a six-minute peer teachback and a delivery observed by a competent reviewer. S needs evidence of the core blocks, a difficult situation, output handover and the scope agreed with Overmind. The fillable matrix in Material/13_Formatmatrix_EN.html flags missing entries.

Person and observation frame

Learner and kit version. For each observed segment record the date, observer’s role and evidence.

Format 1 Executive Briefing

Plan; observed excerpt and output evidence; status O/B/S; next evidence and date.

Format 2 4C Opportunity

Plan; observed excerpt and output evidence; status O/B/S; next evidence and date.

Format 6 Culture and Social Coding

Plan; observed excerpt and output evidence; status O/B/S; next evidence and date.

Format 11 Team Launch

Plan including equivalent modes; observed excerpt and evidence; status O/B/S; date.

Agreed next delivery

For S record the format, bounded scope, who confirmed the agreement with Overmind, date and reference. For O/B schedule the next observed step.

REVIEW CRITERION

All four rows have truthful status, evidence and next action. S applies only to the explicitly approved, competently observed scope.