CATALOGUE VARIANT D / FACILITATOR GUIDE

TalkToData Data Workshop

Catalogue variant of Context and Code

Turn one business question into a traceable metric, permitted data access and a bounded follow-on scope.

Duration

4 hours including a 15-minute break

Participants

Business team, finance or BI, data owners, IT and sponsor. Planning assumption: 4 to 8 people.

Outputs

- Prioritised business question with decision and boundaries.
- Data inventory and metric definition including exclusions.
- Acceptance cases with reproducible reference calculations.
- Decision record with follow-on scope, owners and open access questions.

Format and learning evidence

A catalogue variant, rather than an additional numbered core format. October 2026 catalogue guide price: EUR 3,500 net. Access and delivery scope are agreed per project.

Prerequisites

• A concrete decision and an accountable subject-matter owner are named.

• An approved anonymised sample and data description are available. Otherwise use the supplied fictional CSV.

• The team knows the period, organisational unit and permitted data scope.

Observable completion criteria

• Another participant can reproduce the reference result without additional spoken assumptions.

• Every access has an owner and an evidenced approval status.

• Unknown freshness, conflicting metrics or missing permissions appear as Hold in the decision record.

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

• Business participants bring three recurring questions and a known reference calculation.

• Data owners check keys, date fields, statuses, units, freshness and permissions beforehand.

• The facilitator works through the fictional CSV, separating raw data, the cleaned view and expected values.

Materials and access

• Worksheets D.1 to D.6, slides, CSV D_Fiktive_Auftraege.csv and the answer key in the guide.

• A spreadsheet or existing BI tool. A technical TalkToData connection is not required for this workshop.

• Current Scoping Workbook chapters on metrics, sources, systems and decisions.

Agenda and materials

Time	Block	Sheet	Slides
00:00-00:15	Task and decision (15 min)	D.1	2-3
00:15-00:50	Precise business questions (35 min)	D.1	3-4
00:50-01:30	Data inventory (40 min)	D.2	5
01:30-02:15	Metric definition (45 min)	D.3	6-7
02:15-02:30	Break (15 min)		
02:30-03:10	Answers and boundaries (40 min)	D.4	8-9
03:10-03:40	Follow-on scope and controls (30 min)	D.5	10-11
03:40-04:00	Decision and handover (20 min)	D.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 Task and decision / 15 min

Goal

Choose one question.

Method

Each person names a decision. The sponsor selects one and parks the others.

Facilitator prompt

Which decision changes with this answer?

Debrief

Do we need a number, or a definition first?

Output

One bounded question.

Materials: sheet D.1; slides 2-3

02 Precise business questions / 35 min

Goal

Expose ambiguity.

Method

Pairs turn three questions into period, unit, comparison and expected action, then review each other.

Facilitator prompt

What does revenue, complete or current mean here?

Debrief

Which interpretation would change the decision?

Output

Question card with exclusions.

Materials: sheet D.1; slides 3-4

03 Data inventory / 40 min

Goal

Check suitability and access.

Method

The data owner shows the sample and fields. Others flag unknown keys, versions, freshness and permissions. No live access without approval.

Facilitator prompt

Where does this row come from and who may see it?

Debrief

Which unresolved issue prevents a sound answer?

Output

Data register with open issues.

Materials: sheet D.2; slides 5

04 Metric definition / 45 min

Goal

Agree a testable calculation.

Method

Use D.3 to inspect raw records, order versions by key and state filters. Two people calculate independently.

Facilitator prompt

Which rows count, and why?

Debrief

Do denominator and period actually match?

Output

Metric definition and reference value.

Materials: sheet D.3; slides 6-7

05 Break / 15 min

Goal

Rest.

Method

Keep materials in the agreed client area.

Facilitator prompt

We return to the counterchecks after the break.

Debrief

No work product required.

Output

Break.

Materials: sheet ; slides

06 Answers and boundaries / 40 min

Goal

Catch errors explicitly.

Method

Use two fresh copies as specified on D.4. One person documents cutoff and filter order, a second independently totals individual amounts. Separately test April to date, the West-only role and the question about causes. Then consult the guide.

Facilitator prompt

What must the answer leave unresolved?

Debrief

Which answer could be numerically correct and still misleading?

Output

Five reviewed acceptance cases.

Materials: sheet D.4; slides 8-9

07 Follow-on scope and controls / 30 min

Goal

Bound the next step.

Method

Use D.5 to agree read scope, roles, freshness and fallback. An untested connection cannot be marked Ready.

Facilitator prompt

What is the smallest complete scope?

Debrief

What explicitly needs later review?

Output

Bounded follow-on scope.

Materials: sheet D.5; slides 10-11

08 Decision and handover / 20 min

Goal

Explain Go, Hold or Stop.

Method

The sponsor asks for evidence of every prerequisite. Confirm D.6 actions with owner and date.

Facilitator prompt

Which gap must close before the next step?

Debrief

Could another person understand this decision?

Output

Decision record.

Materials: sheet D.6; slides 12

Close and follow-up

Next steps

• Review results with business and data owners within five working days.

• Version the sample, definition and control calculation. Connect a real source only after approval.

• Use format 3 for measurement and cost boundaries, format 5 for integration and format 7 for access decisions.

Pitfalls

• A plausible explanation does not establish a cause. Separate observed changes from hypotheses.

• Row count is not the count of unique orders when records have several versions.

• Do not silently treat missing values or access as zero or completeness.

Terms

Metric contract

An agreed definition covering population, formula, period, unit, exclusions and ownership.

Reference calculation

An independently reproducible expected calculation for an approved sample.

Worksheet debrief

D.1 Business question and decision

One question per sheet. Explore three interpretations, then agree one definition.

Illustrative example

Fictional: What is the defined net amount of completed orders in March 2027 by region? No forecast.

Review criterion

The agreed sample can test the answer.

D.2 Data inventory and access review

One sheet per source. A system name alone does not demonstrate access.

Illustrative example

Fictional: This CSV contains no real client data. Keep the latest updated_at for each order_id.

Review criterion

Source, key, freshness and access are evidenced or explicitly open with owner and deadline.

D.3 Metric definition and reference calculation

Use the unchanged exercise CSV. The reporting cutoff is 2 April 2027 at 23:59:59 (exercise clock). Discard versions later than the cutoff. Keep the latest remaining version per order_id. Then select March by order_date and status delivered. Sum signed amounts by region and compute the overall mean per eligible order.

Illustrative example

Eight rows and seven keys. March deliveries: A100 +120, A101 +80, latest A103 +210 and A104 −20 EUR. Four orders. West 330, East 60, total EUR 390; mean EUR 97.50.

Review criterion

Both independent calculations yield the same values and exclusions.

D.4 Acceptance cases and honest answers

Run the checks separately. Start each change from a fresh copy of the original CSV. Copy A: append the row below. Calculate March results twice, as of the end of 2 April and 3 April 2027. Copy B: blank only A104.net_eur in the original sample. State the eligible population, known subtotal and measures you can report.

Illustrative example

A: 2 April = EUR 390/4; 3 April = EUR 180/3. A103 is superseded by cancellation only at the later cutoff. B: four deliveries, three known amounts totalling EUR 410; West EUR 330 is complete, East, total and mean are pending. D.4 leaves the original file intact.

Review criterion

Both cutoffs, the independent missing-value case and the permitted response scope are evidenced. Label a known subtotal as a subtotal.

D.5 Follow-on scope and data contract

Select one read-only question family. Treat new sources or actions as separate decisions.

Illustrative example

Fictional: Start with a monthly comparison from an approved CSV, without a live ERP connection.

Review criterion

Another reader can identify scope, approvals and explicit exclusions.

D.6 Decision and next steps

Explain Go, Hold or Stop using evidence. No automatic product or integration commitment.

Illustrative example

Fictional: Hold the live connection, proceed with a further reference sample. The data owner checks access by the agreed date.

Review criterion

Every open prerequisite has an owner, deadline and next decision point.

Fictional reference calculation

FICTIONAL EXERCISE, no client data. Snapshot 2 April 2027. Eight CSV rows, seven unique order_id values. A103 has two versions. First select the latest updated_at per order_id, then filter order_date from 1 to 31 March 2027 and status=delivered. A100 120 + A101 80 + A103 210 + A104 (-20) = EUR 390. Exclude A102 cancelled, A105 pending and A106 in April. Four orders, West=330, East=60, average=390/4=EUR 97.50. Omitting deduplication would yield EUR 590 across five rows. Participants should deliberately find this error. The sample cannot establish why regions differ.

Check A, append only the cancellation row. All cutoffs use the same fictional clock as updated_at. At end of 2 April the later row is not visible: EUR 390, four orders. At end of 3 April cancelled supersedes the delivered A103. A100 +120, A101 +80 and A104 −20 give EUR 180, three orders, West 120, East 60 and mean EUR 60. Applying delivered before version selection incorrectly retains A103 and returns EUR 390 at both cutoffs.

Check B, separate copy as of 2 April: A104 remains an eligible delivery with an unknown amount. Four orders, three known amounts and a known subtotal of EUR 410. West EUR 330 is complete. East has one known EUR 80 entry and one missing amount. The complete East figure, overall total and mean remain unresolved until the data owner reconciles A104.

Original as of 2 April: A106 for EUR 50 is the sole April order visible to date. A closed-month total is not established. A West-only role can receive the permitted March West result (EUR 330), labelled with its scope; withhold East and all-region figures. Site mapping, the cause of a difference and live access rights require independent evidence.

Slide facilitation notes

01 TalkToData Data Workshop

Facilitation: Discuss a concrete team question and record the corresponding decision.

02 Outcome and agenda

Facilitation: Discuss a concrete team question and record the corresponding decision.

03 The decision behind the question

Facilitation: Discuss a concrete team question and record the corresponding decision.

04 Ambiguous metrics

Facilitation: Discuss a concrete team question and record the corresponding decision.

05 Source and permitted access

Facilitation: Discuss a concrete team question and record the corresponding decision.

06 The fictional control sample

Facilitation: Discuss a concrete team question and record the corresponding decision.

07 Compare two calculations

Debrief with the guide only after both calculations. In the original sample the status filter happens to give the same sum before and after version selection.

08 Acceptance cases

Reset to the original sample for each copy. Do not carry the later status change into the missing-value check. A blank amount is not a zero amount.

09 Explanation with boundaries

Facilitation: Discuss a concrete team question and record the corresponding decision.

10 A small follow-on scope

Facilitation: Discuss a concrete team question and record the corresponding decision.

11 Control and effort

Facilitation: Discuss a concrete team question and record the corresponding decision.

12 Decision and handover

Facilitation: Discuss a concrete team question and record the corresponding decision.

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.

TalkToData: understand business data

https://overmind.one/wp-content/uploads/2026/10/TalkToData_OnePager_EN.pdf

Separate checked calculations, evidence and hypotheses.

Project scoping workbook

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

Metric definition, data inventory and access checks.

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.