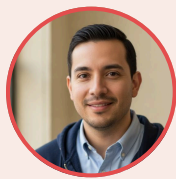




STAGE	1WIN THE WORK STRATEGIZE	2DESIGN THE AGENDA PLAN	3PREP + REHEARSE PLAN	4DELIVER FACILITATE	5SYNTHESIZE + SEND SYNTHESIZE★	6FOLLOW UP + RE-WIN POST
GOAL	Turn a maybe into a signed engagement	A credible, well-paced agenda without losing a weekend	Walk in knowing the plan holds	Run the room, not the tools	Client-ready recap out the same evening	Convert delivery into the next engagement
DOING	· Discovery call, scopes the ask · Writes the proposal	· Assembles from the library · Tunes timing, runs Agenda Check	· Exports run-of-show, packs materials · Rehearses openers	· Timers, scripts, notes in Facilitator · Photographs every flip chart	· Board export + photos into Synthesize · Edits themes into her voice, exports	· Sends recap, waits, nudges · Drafts the next SOW
TOUCHPOINTS	Zoom · email · her site	Planner · library · Agenda Check	Run-of-show export · print	Facilitator app · Sidekick	Synthesize · Markdown · her template	Email · LinkedIn · the recap itself
THINKING	"Is this scope even facilitatable in half a day?"	"This used to take my whole Sunday."	"If the client re-orders tonight, I re-flow in minutes."	"Stay with the room; the laptop holds the plan."	"Every theme traces to a sticky. I can defend this."	"Did the workshop change anything for them?"
FEELING	Hopeful +1	In craft +2	Focused +1	In flow +2	Proud +1★	Uneasy -1
PAIN POINTS	· Unbillable pre-work · Scope creep starts here	· Little; brand polish is still manual	· Late-night client changes · Printing logistics	· Energy dips she can feel but not measure	· Pasting into her branded template is manual	· No evidence of impact · Repeat business rides on anecdotes
OPPORTUNITIES	· Proposal-ready agenda summary from a draft plan	· Brandable agenda exports	· Client-facing agenda share view	· Post-hoc energy read from session events	· Branded one-click recap	· Impact report + commitment tracking (roadmap \$9.1)

TOP OPPORTUNITIES	MOMENTS OF TRUTH
1Impact report + commitment tracking · closes the silent after-send gap at stage 6 (High · Mid)	★ The same-evening recap · lands while the energy is warm and she looks exceptional; the whole product pays off here.
2Branded exports · stage 5 ends inside the product, no template paste (High · High)	★ "Where did this theme come from?" · provenance answers the client challenge in seconds; without it the recap wobbles.
3Client-facing agenda share · prep-stage polish, small lift (Mid · High)	



STAGE	1 RETRO LOOMS TRIGGER	2 GRAB A FORMAT PLAN	3 RUN IT FACILITATE	4 CAPTURE DECISIONS FACILITATE★	5 DISTRIBUTE SYNTHESIZE★	6 NEXT RETRO OPENS LOOP
GOAL	Not wing it this time	A working session plan in under 30 minutes	End on time with everyone heard	Decisions and owners recorded as they happen	Summary in Slack, actions in Linear, before the next call	Close the loop on last time's actions
DOING	· Calendar ping surfaces the retro · Finds 20 free minutes	· Picks a ready-made retro · Swaps one exercise, trims to 45	· Runs against the timer · Fires a poll to break a tie	· Logs each decision with an owner · In the moment, not after	· Synthesizes the board · Pastes into Linear and Slack	· Opens by reviewing last retro's action list
TOUCHPOINTS	Calendar · Slack	Library · ready-made workshops · Pro gate	Run mode timer · live poll	Facilitator notes · decisions list	Synthesize · Slack · Linear	Last session's record
THINKING	"I have twenty minutes and zero ideas."	"Out of the box or not at all."	"For once we'll actually finish the agenda."	"Written down now or lost forever."	"Over two minutes and I'll skip it, same as always."	"First time in months we're not re-raising the same three issues."
FEELING	Dread -1 Relieved +1 Steady +1 On top of it +2 Rushed 0 Trusted +1					
PAIN POINTS	· Blank-page problem · Competing priorities	· Builder is Pro-gated · Any setup cost kills adoption	· Capturing while facilitating splits attention	· Easy to forget mid-discussion	· Manual paste into Slack and Linear · The two-minute ceiling	· If stage 5 was skipped, the loop breaks
OPPORTUNITIES	· Retro reminder with last actions attached	· Free taste of the builder for light tweaks	· One-tap decision capture mid-discussion	· Auto-suggest owners from participants	· Direct Slack/Linear/Jira export	· Auto-open next retro with the prior action list

TOP OPPORTUNITIES

1

Send-to-where-work-lives export

· Slack, Linear, Jira, under the two-minute ceiling

(High · Mid)

2

Open-with-last-actions

· the loop closure that builds team trust

(High · Mid)

3

Lighter free path to a tweaked template

· protects adoption before the Pro gate

(Mid · High)

MOMENTS OF TRUTH

★

The two-minute ceiling

· under it he distributes every Friday; over it he skips, and skipping kills the loop.

★

The next retro's opening

· last time's actions surfacing automatically is when the team starts trusting retros.



STAGE	1IT'S YOURS NOW TRIGGER	2LEARN FAST LEARN	3BUILD ON SCAFFOLDING PLAN	4PRE-FLIGHT PLAN★	5DELIVER FACILITATE★	6SYNTHESIZE + GROW SYNTHESIZE
GOAL	Get from panic to a plan	Enough craft to be dangerous by Thursday	An agenda she trusts because its bones are proven	Catch her mistakes before the room does	Survive the room, sound seasoned	Turn one survived workshop into a skill
DOING	· Rereads the brief, googles · Spirals, briefly	· Reads an Academy ebook chapter · Saves Tips, takes the DNA quiz	· Starts from a ready-made discovery workshop · Swaps one exercise	· Runs Agenda Check, fixes two warnings · Rehearses out loud	· Follows scripts and timing cues · Intervention cards within reach	· Journals what worked, saves keepers · Retakes DNA
TOUCHPOINTS	Slack from her CD · the brief	Academy · Tips · DNA	Library · ready-made workshops	Agenda Check · run-of-show	Scripts · timing cues · Intervention cards	Notebook · favorites · DNA profile
THINKING	"Everyone assumes designers can do this."	"Finally, a path instead of forty blog posts."	"What's safe to change and what breaks the design?"	"Two warnings. Fixed. It says I'm okay."	"The room went quiet. The card says silence is fine."	"I want a coach to tell me what to fix first."
FEELING	Panic -2 Calmer +1 Building +1 Confident +2 Wobbly 0 Growing +2					
PAIN POINTS	· No idea where to start · Imposter syndrome spikes	· Content everywhere, sequence still noisy	· No signal for which swaps are safe	· Little; the product at its best for her	· Live nerves · Nothing practices the room itself	· No guided debrief; Coach is built, not shipped
OPPORTUNITIES	· "First workshop?" onboarding path	· Sequenced first-timer track	· "Safe to swap" hints on template exercises	· Confidence framing for first-timers	· Rehearsal mode; first-timer pacing	· Guided post-session debrief (the Coach decision)

- TOP OPPORTUNITIES

1

Guided debrief

· the strongest real-user case for the Coach ship-or-fold decision (High · Mid)

2

Safe-to-swap hints

· turns template fear into confident tailoring (Mid · High)

3

First-timer sequence through Learn

· one path from panic to Thursday (Mid · High)
- MOMENTS OF TRUTH

★

Agenda Check goes from warnings to pass

· the external "you're okay" that gets her through Wednesday night.

★

Minute 12, the silent room

· surviving it converts her; freezing there could end the ambition.



MARCUS WEBB

FROM BUDGET PRESSURE TO A DEFENDED PROGRAM

STAGE	1 EXPOSED IN THE ROOM TRIGGER	2 DISCOVER + EVALUATE EVALUATE	3 PILOT WITH THE TEAM PILOT	4 SEE THE RECORD PROOF★	5 TRY TO STANDARDIZE SCALE★	6 DEFEND + RENEW RENEW
GOAL	Never be evidence-less in that room again	A tool his team would actually use	Prove it on two real workshops	Evidence he can forward upward	Same quality bar across six facilitators	A renewal case that survives finance
DOING	· Fields the CFO's "what changed?" · Has attendance and smile scores	· Finds Workshopr via a team member · Reads pricing, hunts for team plans	· Two facilitators run full lifecycles on Pro	· Reviews Workshop Records per workshop · Designed, delivered, synthesized	· Circulates shared agendas by workaround	· Assembles the renewal deck · Records plus anecdotes
TOUCHPOINTS	Budget review · HRIS reports	LinkedIn · pricing page · word of mouth	Pro accounts · Planner · Facilitator · Synthesize	Workshop Record · lifecycle strip	Shared docs outside the product	Slides · the records · finance
THINKING	"It went well" is not an answer.	"Practitioner-grade, finally. But where's the team plan?"	"The team actually likes it. That never happens."	"This is the artifact I've been asking for."	"Six people, six systems, still."	"Better than anecdotes. Still short of CFO-grade."
FEELING	Exposed -2 Curious 0 Watching +1 Convinced +2★ Blocked -1★ Guarded 0					
PAIN POINTS	· Happy-sheet evidence only	· No team seats to buy · Free-through-September muddies the eval	· Individual accounts; he has no visibility	· Records are per-user; no program roll-up	· Team features parked · No shared library, no admin oversight	· No impact report · Commitments untracked, outcomes unproven
OPPORTUNITIES	· ROI narrative content for L&D leaders	· Team plan with seats and billing (roadmap \$9.2)	· Pilot-mode visibility for a buyer	· Program-level record roll-up	· Shared team library and standards	· CFO-grade impact report (roadmap \$9.1)

TOP OPPORTUNITIES

- 1 Team seats + shared library · turns a convinced watcher into a paying buyer (High · Low-Mid)
- 2 CFO-grade impact report · the renewal-deck artifact he actually needs (High · Mid)
- 3 Program-level record roll-up · six facilitators, one view (Mid · Mid)

MOMENTS OF TRUTH

- ★ Forwarding a record upward · the first time evidence leaves L&D and lands with an executive is the conversion moment.
- ★ The seat-purchase dead end · convinced and unable to buy; today the journey ends in a workaround, not a contract.