

Workshop Kit — Operating Model Selection

Print-ready facilitator pack for a half-day leadership workshop that selects the enterprise operating model before pilot spend begins.

For executive sponsors, BU leaders, portfolio office, enterprise architecture, compliance, and the Agile CoE
Companion to Executive Brief · Implementation Plan · SteerCo Pack
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Confidential working document · Use in-room with physical printouts, wall space, and a named decision maker

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Half-day operating model selection workshop

4 hours · print-ready facilitator pack · British English

1. Purpose, outcomes, and facilitation stance

This workshop exists to make **one leadership decision**: which enterprise operating model sketch becomes the target design for wave 1, and what fallback will be used if the first choice proves politically or operationally unworkable.

BY THE END OF FOUR HOURS, YOU NEED

- A named target operating model and a named fallback
- Agreement on the top needs driving that choice
- Clarity on what is mandated centrally versus optional locally
- A draft pilot slice and sponsor-owned next actions
- A written decision record that survives follow-up politics

FACILITATOR STANCE

Neutral on personalities, strict on trade-offs

You are not selling a framework. You are making trade-offs visible, protecting the timebox, and forcing vague preferences into explicit design choices.

DECISION PRINCIPLE

Pick the model for the next 12–18 months

Do not optimise for the perfect future-state enterprise. Select the operating model that best fits the named needs, sponsor appetite, and realistic rollout capacity now.

2. Pre-workshop checklist

Two weeks before

- ☐ Confirm the decision maker. If the sponsor will not attend, reschedule rather than run a theatre workshop.
- ☐ Complete diagnosis summary: federation map, current pain points, dependency hotspots, compliance load, and success criteria.
- ☐ Draft the four operating model sketches A-D on one page each using the same format.
- ☐ Interview likely dissenting stakeholders in advance so the workshop is for decision making, not first-time objection handling.
- ☐ Collect the six needs to be scored and pre-socialise definitions so attendees do not argue over semantics in the room.

One week before

- ☐ Send a pre-read: diagnosis summary, sketch definitions, scoring scale, and workshop objective.
- ☐ Ask each attendee to rank their top three enterprise needs before the session.
- ☐ Prepare printouts: agenda, selection canvas, scoring matrix, decision record, pilot slice worksheet, and name cards.
- ☐ Confirm room logistics, hybrid links if needed, wall space, markers, sticky dots, and timer.

- Brief the sponsor privately on the expected decision, likely fault lines, and the importance of closing with an explicit call.

Day before

- Recheck attendee list and verify no essential function is missing: BU lead, architecture, portfolio, compliance/risk, CoE, sponsor.
- Load the room with all four sketches visible from the start; do not reveal them one by one as if they are sales options.
- Write the six needs and 1-5 scoring scale on a flip chart.
- Prepare a parking lot for issues that matter but do not change the operating model choice.
- Print one extra copy of the decision record for the sponsor to annotate by hand.

DO NOT PROCEED IF

The sponsor is absent, the workshop objective has drifted into framework selection, or participants have not seen the current-state diagnosis. Those conditions reliably create opinion battles disguised as strategy.

3. Room setup and materials

Room setup

- U-shape or boardroom layout with clear sightlines to a single decision wall
- One wall for the four sketches; one wall for scoring matrix and parking lot
- Visible timer; facilitator position near wall, not behind a laptop
- Separate seating for observers only if they are silent and named as such
- Hybrid participants projected large enough to intervene without delay

Materials list

- A3 printouts of sketches A-D
- A3 scoring matrices for table groups
- Sticky dots in four colours
- Sharpie pens, wall tape, sticky notes, blu-tack
- Printed decision record and pilot worksheet
- Timer, speaker notes, extension leads, water, and break signage

Facilitator tip

Keep participants standing at the wall during scoring if the room allows it. Standing shortens speeches, speeds convergence, and makes political disagreement more visible than a seated boardroom discussion.

If the session is hybrid, assign a co-facilitator to watch the remote chat and voice objections in real time. Otherwise remote participants become a silent veto after the meeting.

4. Participant roles and decision rules

Sponsor

Owens the final call, breaks deadlock, and confirms what will be mandated centrally.

BU / country leads

Represent delivery reality, local constraints, and political viability of rollout waves.

Architecture / platform

Stress-test dependency, shared service, and enabling-team implications.

Compliance / portfolio / CoE

Validate governance in flow, capacity honesty, and enterprise reporting needs.

Decision rules: score against named needs only; compare sketches on enterprise fit, not personal comfort; document the fallback before closing; and push non-structural issues into the parking lot. A workshop without documented decision rules usually collapses into the loudest senior opinion.

Need fit over familiarity

Target + fallback both required

Mandated vs optional must be explicit

Pilot slice chosen against evidence

Parking lot protects time

Sponsor closes the room

5. Four-hour agenda with facilitator notes

Use the table below in the room. The activity is the smallest part of the job; your real task is to shape the conversation, watch for drift, and keep trade-offs tied to enterprise needs rather than framework preference.

Time	Activity	What to say	What to watch for	Common derailers
00:00-00:20	Open, frame the decision, confirm success criteria	"Today is not a SAFe versus Scrum debate. We are selecting the operating model that best fits the next 12-18 months of enterprise delivery."	Whether the sponsor visibly supports the objective; whether anyone tries to reopen the diagnosis.	Late arrivals, sponsor ambiguity, stakeholders pushing for additional analysis before any decision.
00:20-00:50	Recap diagnosis and agree the six needs to score	"If a need is not material in the next 12 months, do not score it as if it were. We are choosing for real constraints, not for a textbook enterprise."	People sneaking in pet priorities; fuzzy language such as "agility" without operational meaning.	Turning needs into solution statements, especially "we need SAFe" or "we need autonomy" without definition.
00:50-01:40	Walk through sketches A-D and trade-offs	"Listen for where each sketch helps us most, where it hurts, and what sponsor behaviour it assumes. No sketch is free."	Which sketches attract emotional support; where architecture and compliance show concern; whether D is treated correctly as an overlay.	Participants evaluating the people they associate with a model instead of the model itself.
01:40-01:55	Break	"Please use the break to mark your provisional front-runner and the one you think is politically unrealistic."	Side conversations that are likely to reopen as positional battles.	Participants negotiating outcomes in the corridor without the sponsor present.

Agenda detail (continued)

Time	Activity	What to say	What to watch for	Common derailers
01:55-03:00	Score the front-running sketches against the six needs	"A three means acceptable but unremarkable. Reserve fours and fives for clear fit. Explain any one or five with evidence, not instinct."	Score inflation, anchoring to one senior voice, inconsistent scoring logic between needs.	Using scores as votes for favourite models instead of fit against the need definition.
03:00-03:35	Select target model, fallback, and mandated elements	"We are now moving from preference to decision. If this model is chosen, what becomes mandatory everywhere in wave 1, and what remains locally configurable?"	Whether the sponsor can articulate the choice; whether local autonomy is protected with boundaries rather than vague promises.	Deferring the hard part by saying "we can work that out later" on mandates, governance, or pilot scope.
03:35-04:00	Define pilot slice and confirm next actions	"The decision is only credible if we can name the first slice, the owners, the dates, and the metrics before we leave."	People choosing the easiest pilot rather than the slice that proves federated coordination.	Pilot scope becoming so small it proves nothing, or so large it cannot start within the quarter.

Facilitator notes by time block

Opening note: State the decision in the first three minutes. Senior participants tolerate workshops when they know exactly what will be decided. If you sound exploratory, they will keep their options open and wait you out.

Watch for: language like "let's socialise options" or "this is just a first pass". That language signals no one is expected to commit.

Diagnosis recap note: Use evidence, not adjectives. Say "regulatory work is consuming 30% of capacity outside the backlog" rather than "compliance feels heavy". Specific evidence reduces ideology.

Watch for: participants disputing minor diagnosis details to avoid engaging with the operating model decision.

Sketch walkthrough note: Present each sketch with the same sequence: where it fits, what it optimises, what it costs, and what sponsor behaviour it requires. That consistency makes political bias more obvious.

Common derailer: "Could we take the good bits of all four?" Answer: "Only after we choose the backbone. Hybrids without a backbone become exceptions everywhere."

Scoring note: Ask one function at a time to speak: BU first, then architecture, then compliance, then CoE. It prevents the room from converging prematurely around the most senior person present.

Common derailer: debates about whether a score should be 3 or 4 before the need is understood. Re-anchor to the written need definition.

Decision note: When scores are close, move from totals to trade-offs: "Which weakness can we tolerate in wave 1, and which weakness would break credibility?" This often unlocks a tie faster than arithmetic.

Watch for: attempts to postpone mandated versus optional decisions. That postponement usually recreates the same argument in pilot launch.

Close note: Read the draft decision record aloud. Hearing the decision in complete sentences exposes ambiguity. Ask the sponsor to correct the wording live, then capture it.

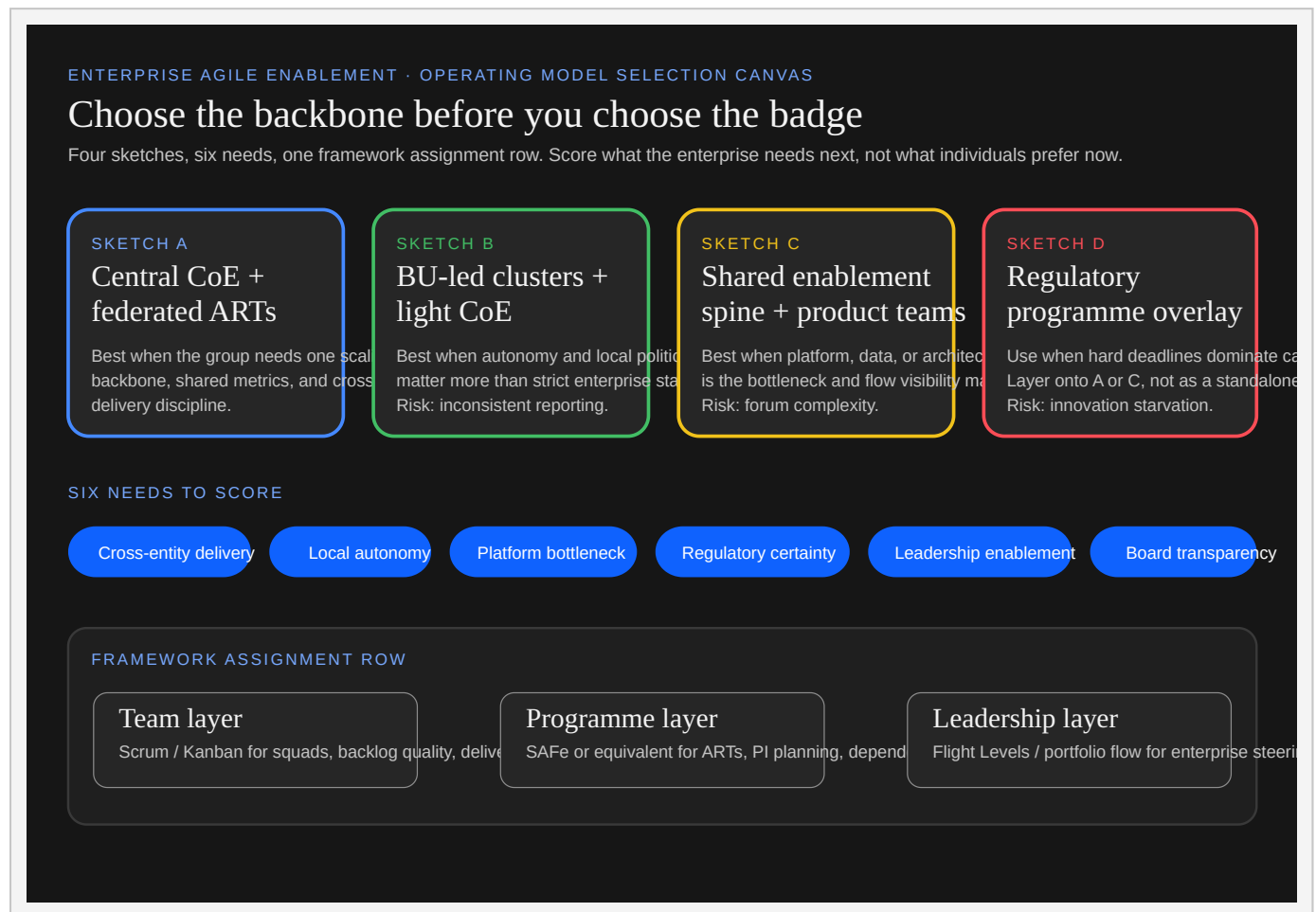
Common derail: ending with "we'll circulate notes". Notes are not a decision record and rarely settle contested governance questions.

FALLBACK SCRIPT FOR CONFLICT

"We do not need unanimous enthusiasm. We need a sponsor-backed model that fits the most important enterprise needs and can be piloted inside the next quarter. If you disagree, please state which named need is being underserved and what evidence supports that view."

6. Operating model selection canvas

Print this page in colour. Use it as the wall anchor for the option discussion before scores are assigned.



Use the canvas to anchor option discussion. After the target model is chosen, annotate the framework row only with the minimum mechanisms required for the chosen backbone.

7. Needs scoring matrix

Scoring scale: 1 = poor fit, 3 = workable with trade-offs, 5 = strong fit. Score only against the agreed need definitions.

Need	Sketch A	Sketch B	Sketch C	Sketch D overlay	Evidence / note
Cross-entity delivery on shared outcomes					
Local autonomy across BUs or countries					
Platform or architecture bottleneck relief					
Regulatory deadline certainty					
Leadership-level enablement					
Board-ready transparency					
Total					

DECISION HEURISTIC

If two sketches score within one point of each other, compare cost of change, sponsor appetite, and reporting clarity. Close scores do not mean "no decision"; they usually mean the organisation needs a target and a fallback captured in writing.

8. Operating model decision record

Field	Fillable content
Date	
Executive sponsor	
Participants	
Target operating model selected	
Fallback operating model	
Top three needs driving the choice	
Why the rejected option was not chosen	
Mandated centrally in wave 1	
Optional locally in wave 1	
Framework assignment by layer	
Governance hooks required	
Key assumptions / dependencies	
Review date	

SPONSOR WORDING

Decision sentence to read aloud

"We are adopting _____ as the wave 1 operating model, with _____ as fallback if the stated assumptions fail. The following elements are mandatory group-wide: _____."

EVIDENCE LOCK

What must accompany the record

Attach the scored matrix, the final sketch mark-up, and the pilot slice worksheet. Without those artefacts, the decision record can be reframed after the meeting.

9. Pilot slice selection worksheet

Choose a slice that proves the operating model under real federation conditions. The pilot should be small enough to start this quarter and rich enough to expose dependency, governance, and enablement issues.

Candidate slice	Why now	Dependency richness	Sponsor strength	Compliance exposure	Time to first PI	Total / note

Chosen pilot slice

Known risks

In-scope entities / teams

Enablement required before launch

First success signals after one PI

Owner and start date

POOR PILOT CHOICES

- The easiest single team with no cross-entity dependencies
- A politically symbolic slice with no sponsor time to support it
- A massive domain that cannot reach first PI readiness inside the quarter
- A slice that hides compliance work outside the backlog

10. Post-workshop actions checklist

- ☐ Circulate the signed decision record within 24 hours.
- ☐ Confirm the target and fallback sketches in the sponsor's own words.
- ☐ Assign one owner for mandated standards and one owner for pilot mobilisation.
- ☐ Book the pilot readiness review within two weeks.
- ☐ Translate the chosen model into RTE, PO, leader, and architecture enablement paths.
- ☐ Baseline current adoption, dependency, and regulatory metrics before the pilot starts.
- ☐ Publish the first SteerCo reporting cadence and the metric dictionary.
- ☐ Capture unresolved parking-lot issues with owner, forum, and due date.
- ☐ Review whether any local autonomy promises conflict with the mandated backbone.
- ☐ Schedule a 90-day operating model health check.

Action	Owner	Due date	Status note
Decision record finalised and stored			
Pilot slice sponsor confirmed			
Enablement plan drafted			
SteerCo pack tailored for the chosen model			
Governance forums aligned to pilot cadence			
Metrics baseline captured			

A successful workshop ends with a written choice, a named pilot, and sponsor-owned next steps. If all you have is enthusiasm, you have not finished the operating-model work.