

Deep Dive Session – Process Overview

Purpose:

A *focused, time-boxed decision meeting* designed to **pressure-test feasibility, unblock stakeholders, and commit to a clear next step** for a strategic or operational decision.

1. Scope & Nature of Engagement

- **Format:** Live, facilitated decision workshop
 - **Duration:** 75–90 minutes
 - **Prep Required:** 30–45 minutes of lightweight pre-work
 - **Cost:** Paid engagement (typical range \$7,500–\$10,000)
 - **Outcome:** A *clear, executable decision path* with owners, timeline, and constraints identified.
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2. Goals & What Gets Decided

At the end of the session, the group will have:

- ✓ A **decision date** and **success criteria**
 - ✓ Explicit **constraints** (compliance, systems, budget, timeline)
 - ✓ Surfaced **blockers** (data, governance, ownership gaps)
 - ✓ A selected **next-step lane** (e.g., deeper diagnostic, follow-on work, or install path)
 - ✓ Clear **owner-level asks** tied to evidence gates
 - ✓ Optional: scoped brief delivered within 24 hours
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3. Pre-Session Preparation

Participants should spend 30–45 minutes gathering and framing information across these six key areas before the session:

1. **Objective:** The decision you want to reach and *why now*
2. **Current Reality:** Key facts about systems, process, team, and performance
3. **Scope Guess:** What's in and out (even if imperfect)

4. **Constraints:** Known limits — compliance, tools, budget, timing
5. **Data Reality:** Where relevant data lives and how accessible it is
6. **Stakeholders:** Who must approve and who must execute

If participants can answer these in bullets, they are ready.

4. Attendance & Authority Requirements

To work effectively, the session must include:

- **Decision Owner:** Person who can say “yes/no” and fix a decision date
- **2–4 Key Owners:** Typical roles include data/system, compliance/security, finance, operations
- **Optional:** Legal or other domain specialists, as needed

Note: If critical decision authority isn’t present, the session is rescheduled.

5. During the Session

The facilitator leads a structured discussion focused on:

- Clarifying **what must be true** for a viable decision
 - Surface *unknowns* that block progress
 - Assessing readiness of inputs and people
 - Jointly selecting the most appropriate *next step*
 - Assigning **owners, due dates, and evidence checks** for each action
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6. Deliverables (Within 24 Hours)

Delivered as a **forwardable, decision-ready brief**, typically including:

A. Decision Memo (1–2 pages)

- Decision owner & date
- Success criteria & constraints

- Top blockers identified
- Selected next-step lane with rationale

B. Action Table + Evidence Gates

- Owner / Ask / Due date
- Pass/fail **evidence gates** needed to start work
- Minimum viable data requests and source locations
- Stakeholder readout plan

Optional: A scoped brief add-on within 24 hours.

7. Why This Works

- **Decisionable:** Explicit success criteria and decision date
 - **Operable:** Owners and asks assigned immediately
 - **Gateable:** Pass/fail checks before committing execution
 - **Forwardable:** Summary can be shared internally without extra meetings
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