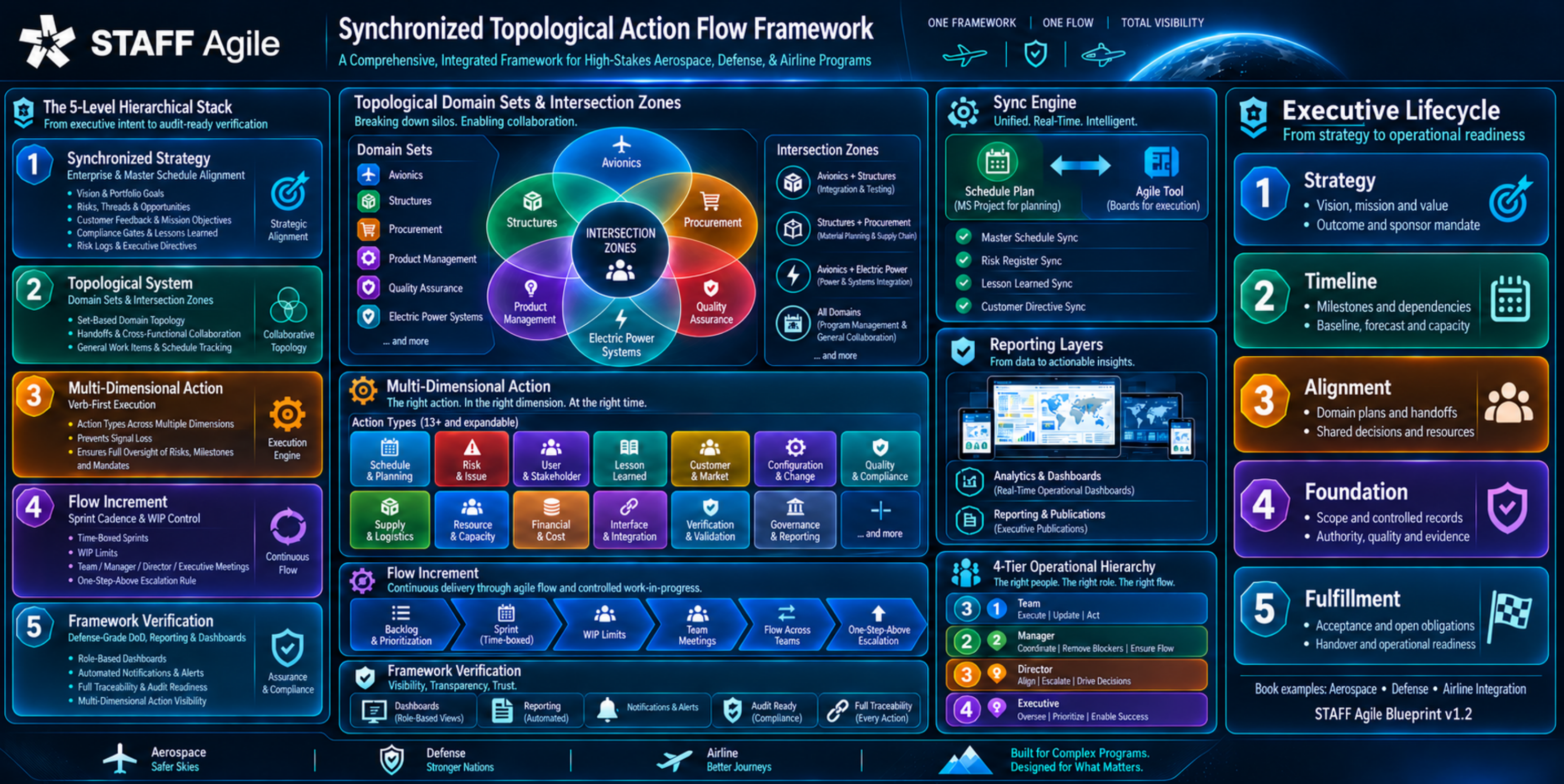


STAFF Agile / ORIGINAL ENGLISH BLUEPRINT





STAFF Agile

STAFF AGILE

Project Management Handbook

Synchronized Topological Action Flow Framework

One shared agenda / clear ownership / useful evidence



ENGLISH EDITION 3.0

29 October 2026



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PART 00

Fundamentals

Purpose, shared vocabulary and the connected work system

ONE CONNECTED SYSTEM

One shared agenda

Intersection areas and clear ownership

Flows to the goal



01 STAFF Agile for any organization

One shared agenda connects people, plans, learning and decisions in organizations of any size.

Start with the work, wherever it happens

STAFF Agile works in organizations of any size, from a small company to a large multi-domain enterprise. Its greatest benefit is in large companies, where work and decisions must remain connected from top management to individual employees. It uses the existing organization, roles and authority routes, so adoption can begin quickly without a structural reorganization. Its basic unit is an Action with one accountable owner, a useful next move and a result or completion condition suited to the work.

The shared agenda connects work, decisions and handoffs across teams. Each specialist area keeps its expertise and authority. Every Action names its owner, access scope, source record and next move. The same record can support a software release, supplier handoff or customer-facing service change.

ONE AGENDA / CONNECTED WORK

Like circulation, one agenda carries work from each starting point to the next useful move.



The analogy shows connection; owners, permissions and source authority remain explicit.



Combine learning with credible commitments

When needed, STAFF Agile uses short feedback cycles to expose new information and adapt the next Action. It also keeps agreed outcomes, dependencies, controlled baselines and need-by dates visible so people can make credible commitments. Teams can advance small results continuously while an authorized schedule coordinates longer obligations. The cadence and controls follow the work; iteration and baselines both require accountable decisions.

What STAFF means

Staff means the people who work for an organization. A staff meeting is a recurring gathering in which a team and its leadership align goals, coordinate work, discuss obstacles and make decisions within their authority. Organizations connect several such meetings because decisions and dependencies cross team boundaries.

STAFF Agile connects familiar Staff meetings through one shared agenda. Because it follows the current management structure and authority routes, a company can adopt it quickly. Specialist work, domain handoffs and decisions remain linked across levels, with an accountable owner and visible next move on each Action.

STAFF Principles

The formal name is Synchronized Topological Action Flow Framework. STAFF names five operation principles used together on the same work: Synchronized Strategy, Topological System, Action-Multi Dimensional, Flow Increment and Framework Verification. Staff, with a capital S, also denotes an authorized organizational meeting group such as Manager Staff. These are the operation principles; the executive principles below describe the five responsibilities leaders apply to the same project.

STAFF / FIVE PRINCIPLES

Five connected questions for the same work.

S

SYNCHRONIZED STRATEGY

Connect work to an agreed outcome and credible commitments.

T

TOPOLOGICAL SYSTEM

Show domains, intersections and real handoffs.

A

MULTI-DIMENSIONAL ACTION

Record job type, useful result and one accountable owner.

F

FLOW INCREMENT

Highlight feasible work; advance a bounded useful result.

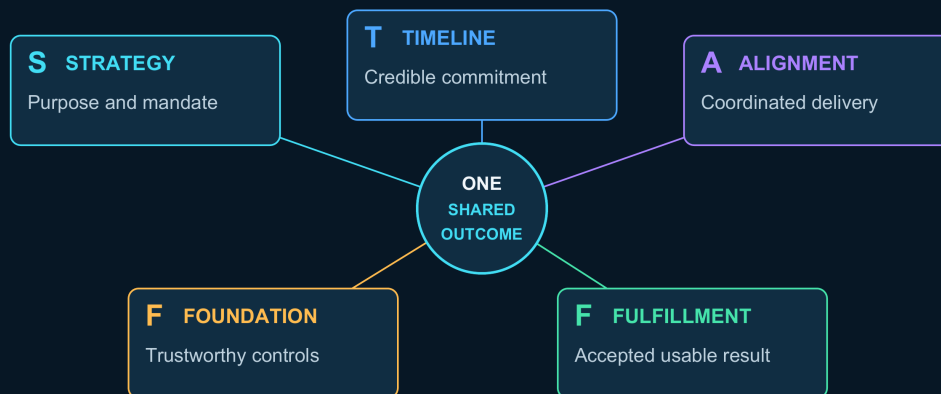
F

FRAMEWORK VERIFICATION

Record the result and evidence; apply required review or acceptance.



THE EXECUTIVE VIEW / FIVE RESPONSIBILITIES ONE OUTCOME



The five executive principles are Strategy, Timeline, Alignment, Foundation and Fulfillment. They guide the same project from purpose and credible commitment through coordination, controls and delivery. The operation principles describe how the connected work moves; the executive principles describe what leadership steers. Both remain active throughout delivery.

A framework for one shared agenda

Single Source of Action is the One Source of Truth for work: one organization-wide shared agenda with readable jobs, accountable owners, current work states, dependencies, attention requests and next reviews. It links to approved schedules, engineering records and evidence while those systems keep authority for their records.

At each regular Staff meeting, participants review the authorized part of the same agenda. Routine work continues under delegated authority. Highlight marks the level where an Action needs attention. Authorized people can bring the same Action into a relevant Staff area, with or without Highlight. Record discussion and decisions on that Action.

Why the shared agenda matters

Any organization with dependent work needs contributions to arrive in a usable order. Separate lists hide commitments, handoffs wait for a named receiver, and unresolved choices wait for authority. One agenda makes the owner, dependency, dates and next move visible together. Scope and permissions still govern who may read the action.

Use this handbook

Part 00 introduces the purpose, big picture and Aster example. Part 01 explains the five executive principles. Part 02 develops the operation principles, shared agenda, access, Actions, flow, capacity, dashboards and notifications. Part 03 provides practical templates. Core marks a defining STAFF choice, Recommended a useful starting practice and Example a fictional illustration.

Framework originator: STAFFAgile.org. STAFF Agile was developed by an Agile Architect with more than ten years of practice, including five recent years in aviation, defense and airline integration. The framework coordinates work with the organization's established engineering, safety, contractual and acceptance authorities.



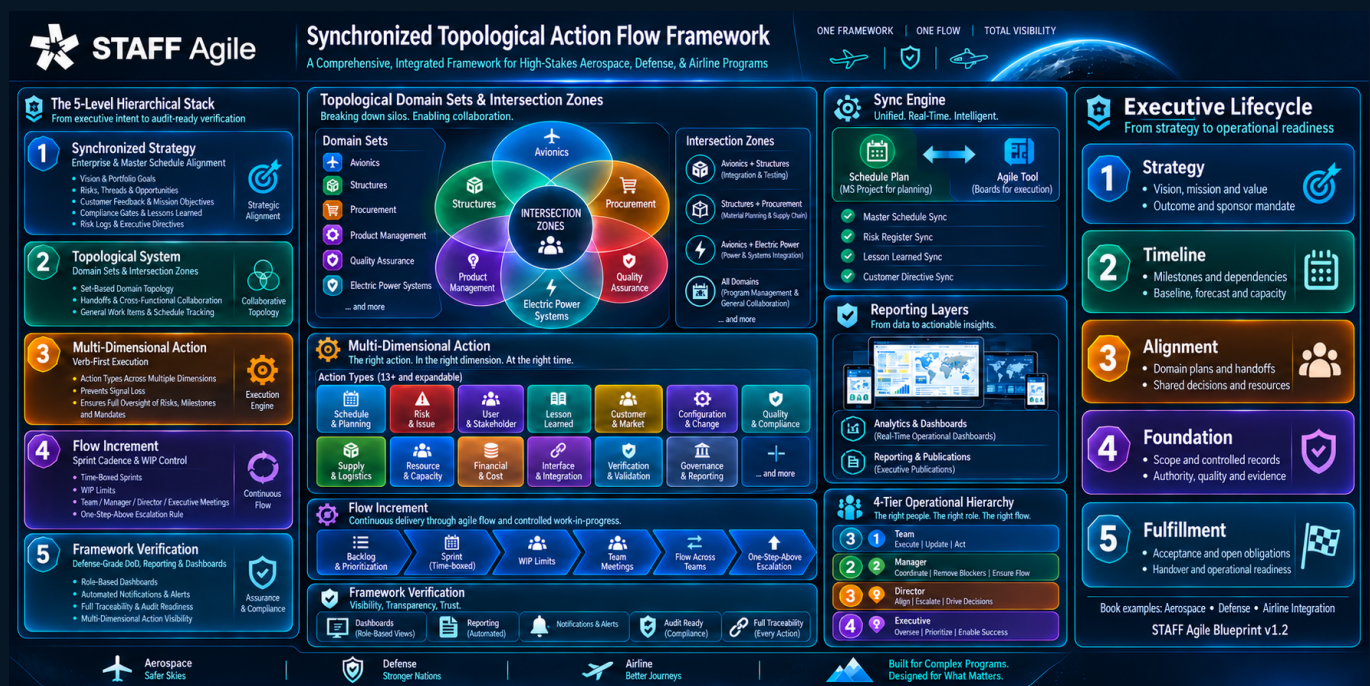
Aster example

At Aster, an interface engineer owns the connector-handoff Action. Procurement confirms the supplier input, Electric Power checks the requirement, and the Team Leader receives a Highlight about the date gap. The manager can resolve reviewer capacity through the existing Staff route. The engineer remains the owner and sees the returned decision on the same agenda item, while the controlled drawing stays in its engineering source.



02 The STAFF big picture

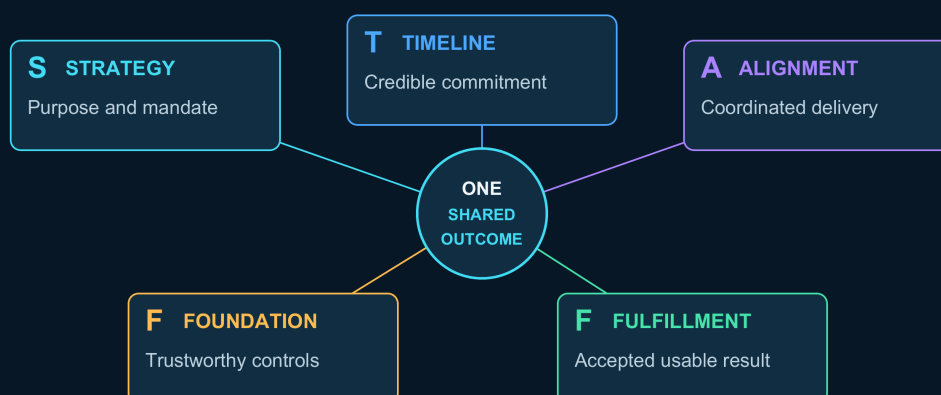
The original blueprint shows the complete conceptual map; the executive principles connect it to leadership decisions.



The original blueprint remains the big-picture map of STAFF Agile. Its broad connections are the operating principles, domain intersections, action types, flow, verification and the complementary executive lifecycle. Read its earlier implementation labels with the current rules in this handbook: one shared agenda, one accountable owner per action, optional Highlight requests, a suitable local cadence and four operational tiers.

The executive principles

THE EXECUTIVE VIEW / FIVE RESPONSIBILITIES ONE OUTCOME





Strategy authorizes purpose and mandate. Timeline tests a credible commitment. Alignment coordinates domain contributions and shared resources. Foundation maintains trustworthy scope, records and decision rights from initiation. Fulfillment prepares an accepted result and a ready recipient. Foundation supports every responsibility rather than arriving late in the project.

Read the connections

Start with the intended outcome, identify the contributing domains, choose the Action type and name one owner. Keep the status, dates and next move current. Cross-team work is visible in the relevant Intersection. Authorized people can bring the same Action into a Staff or Zone area for discussion. Add the result to the record, then continue the work in its domain. Link to the source records needed for the work and decision.

Aster example

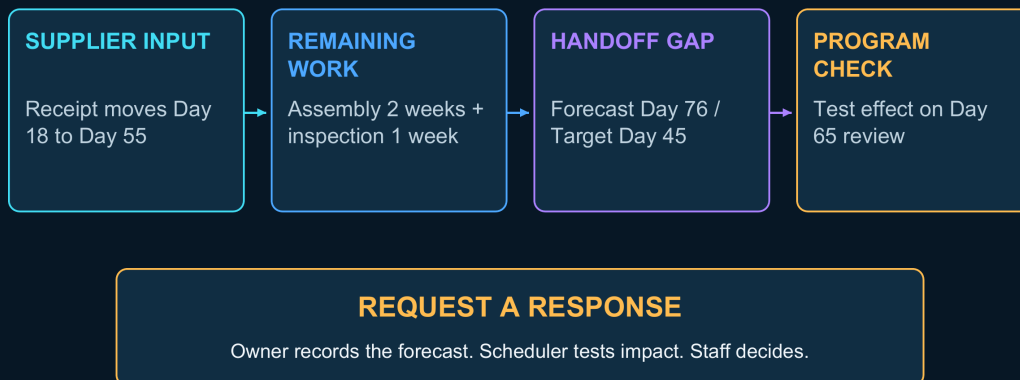
Aster is a large aviation organization with engineering, procurement, production and executive Staff groups already in place. Its Day 65 demonstrator is the shared outcome. A connector input expected on Day 55 drives a Day 76 handoff forecast against a Day 45 target. One agenda carries the supplier Action, engineering dependency, authorized Highlight request and returned management decision across those groups. The existing reporting structure can use the framework without being replaced.



03 The Aster Aviation example

One fictional connector change supplies the common problem used throughout the handbook.

ASTER / ONE CONNECTOR CHANGE CREATES A DECISION



Program brief

Aster is integrating an avionics unit into an aviation demonstrator. Avionics, Structures, Electric Power, Procurement, Product Management and Quality contribute. The program has a Day 45 internal handoff and plans a Day 65 integration review. A supplier changes the connector receipt forecast from Day 18 to Day 55.

Assume assembly starts on receipt and takes two calendar weeks, followed by one calendar week of inspection. The handoff is therefore ready on Day 76. Its owner records a Day 76 Finish Date against a Day 45 Target Date. The scheduler checks downstream logic and capacity before claiming an effect on the Day 65 review.

The same problem in different views

Procurement records the supplier change and links the source acknowledgment. The connector-handoff action names its integration owner, current drawing revision D, receiver and next review. A temporary Power Intersection Zone connects Avionics, Electric Power and Procurement while they resolve the shared input. Each domain retains its technical or commercial authority.

The owner can Highlight an Action for the Team Leader to review. The leader may resolve the issue or bring the same Action into an authorized Manager Staff area. If wider authority is needed, an authorized person changes its Highlight level and places it in the relevant Staff area. Record the impact, options, latest useful response date and decision on the same Action. The original owner continues the next move.

Possible responses

Remove a blocker, obtain qualified support, resequence work, split a genuinely independent result, or propose an authorized target change. Keep the current forecast visible while assessing those choices. The approved baseline remains traceable. A later drawing release, supplier follow-up or controlled change becomes a linked action when it has a distinct result or owner.

Aster names, dates, counts and records are fictional. The example illustrates coordination and does not establish product, regulatory or contractual approval.



PART 01

Executive Principles

Leadership responsibilities, sponsorship and decisions

ONE CONNECTED SYSTEM

One agenda for decisions

Leadership across levels

Credible delivery



04 STAFF executive principles

Five leadership responsibilities connect executive vision to a usable result.

A clear executive promise

STAFF Agile helps leaders connect Strategy to a credible Timeline, cross-domain Alignment, a trustworthy Foundation and responsible Fulfillment. Each responsibility asks a different decision question. Their answers meet in the shared agenda as owned work, dates, dependencies and decisions.

The lifecycle is an executive reading of the same project, not a second reporting system. Strategy remains relevant when needs change; acceptance criteria guide early work; and Foundation supports the project from initiation. New information can change a plan or trigger a new leadership decision at any time.

Sponsor the practice from the top

EXECUTIVE SPONSORSHIP / MAKE THE PRACTICE REAL

Visible leadership connects authority to action.



The CEO or equivalent top authority and senior Staff sponsor the move to one shared agenda. They name the intended outcomes, decision rights and responsible leaders; make time for the regular Staff reviews; and remove organizational obstacles that local teams cannot clear. Sponsorship means using the same visible work and decision route, not asking every action to wait for executive approval.

Each Staff meeting uses its authorized dashboard or live agenda view to review selected work, especially unresolved handoffs, Highlights, date gaps and decisions due. The meeting records the decision, owner and next review on the underlying action. Senior leaders demonstrate the practice by returning decisions to owners, protecting source-record authority and checking whether lower levels can resolve their own work.

Roll out the practice level by level. Start with a small connected set of meetings, teach owners how to maintain one action record, check that leaders act on requests, and expand only when the handoffs and permissions work. A dashboard that is viewed but never used to decide is not a successful transformation.

Five questions for a review

Strategy: Is the outcome still worth pursuing? Timeline: Is the delivery commitment credible? Alignment: Can the domains and resources deliver together? Foundation: Can the scope, records and decision rights be trusted? Fulfillment: Can the intended recipient accept and use the result?



Link leadership to the next move

Record the decision, accountable authority, affected actions and next review. Use the operating chapters to carry out the response. A management color or an action count is useful only when the underlying work and its uncertainty remain visible.

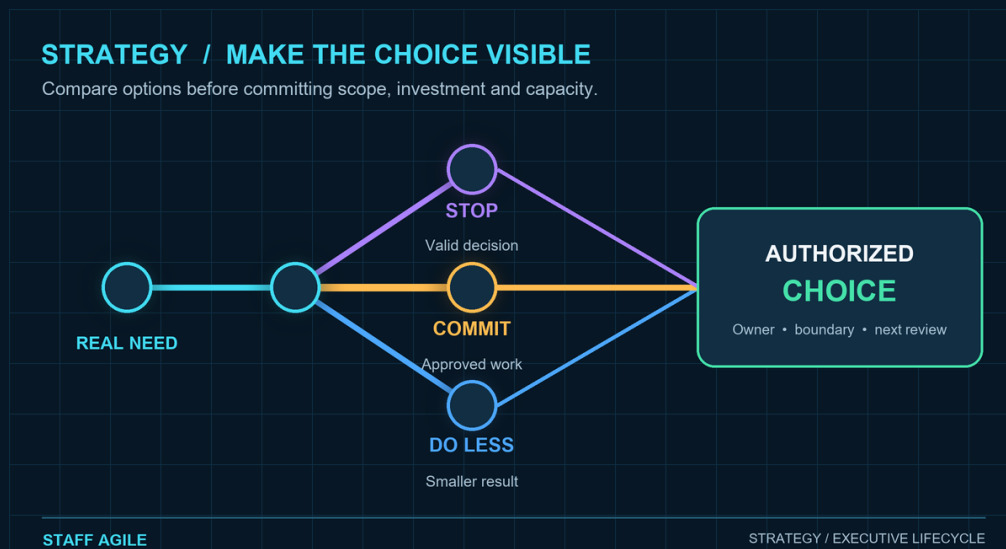
Aster example

The supplier change is investigated once. Timeline evaluates the handoff gap, Alignment resolves the shared reviewer or supplier issue, Foundation preserves the approved drawing and baseline, and Fulfillment checks what the recipient still needs. Strategy confirms that the demonstrator remains the intended outcome.



05 Strategy choose the outcome

The Vision: establish why the project exists, what value it should create and who is accountable for that value.



Executive purpose

Strategy translates enterprise intent into a bounded project mandate. State the customer or mission problem, desired capability, expected benefits, investment assumptions and strategic fit. Compare realistic options, including doing less or not proceeding. An attractive technical solution without a clear need is not a sufficient business case.

Decisions and working records

The sponsor authorizes the outcome and investment within delegation. The project manager establishes scope boundaries and planning assumptions with domain leaders. Maintain a business case or mission justification, project charter, stakeholder map, outcome measures and initial acceptance concept. Name a benefits owner who remains responsible for evaluating value after delivery where appropriate.

Define what is included, what is excluded and what would trigger reconsideration. Record assumptions about demand, operating context, resources and external dependencies. Link actions and outcome records to these decisions so teams can explain why their work matters.

Review evidence

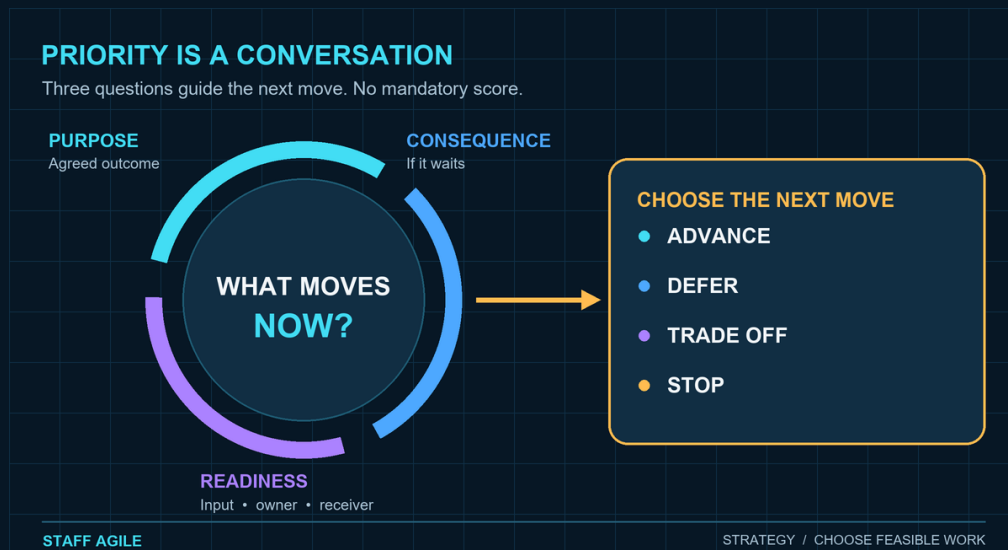
Review the continuing validity of assumptions, stakeholder agreement, unresolved scope decisions and the relationship between committed work and intended outcomes. Counting strategic initiatives is less informative than examining whether their funded work can deliver the stated result. A material change in need should trigger a business-case decision, not an automatic expansion of scope.

Aster example

The sponsor wants an integrated demonstrator with accepted interface evidence. Strategy defines the intended demonstration, recipient, funding boundary and success criteria. It does not prescribe every engineering task. The customer request is assessed against that intent before becoming approved work.



Choose feasible work



This is a practical conversation checklist, not a new scoring method or a required substitute for tools such as SWOT. Start with the approved purpose, discuss the consequence of delay, then check input readiness, owner capacity and receiver availability. Decide whether to advance, defer, trade off or stop the action. Add a numeric score only if the organization has defined what it means and how it supports a decision.

Mandatory obligations follow their governing process. For discretionary work, compare dependency relief, uncertainty reduced and the effect on the agreed outcome. A priority label cannot create capacity or a usable input. Record the choice and what will wait on the existing agenda.

Aster priority choice

The drawing review protects the Day 45 handoff. Its input is available, but its reviewer is already committed. The Team Leader compares the consequence of delay and obtains a capacity decision before treating the review as ready to start.

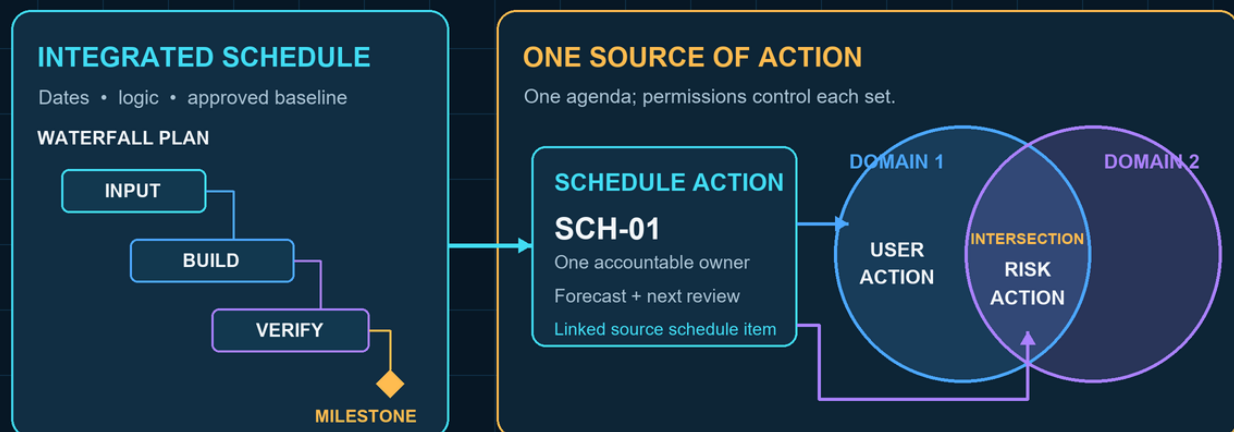


06 Timeline make a credible commitment

The Commitment: connect milestone obligations to dependency logic, capacity and explicit uncertainty.

TIMELINE / PLAN THE WORK, CONNECT THE ACTIONS

Waterfall schedule logic stays in the plan. Coordination happens on one shared agenda.



The schedule governs dates; linked agenda actions make the response visible without copying the plan.

STAFF AGILE

TIMELINE / EXECUTIVE LIFECYCLE

Executive purpose

Timeline turns the mandate into a delivery plan. Distinguish contractual dates, internal targets, external windows and forecast dates. Some constraints are fixed by agreement; changing them may require negotiation and authorization. A date being important does not make its underlying plan feasible. Leaders need early visibility of the gap between obligation and forecast.

Decisions and working records

Use the integrated schedule to maintain work packages, dependencies, calendars, milestones and the approved baseline. Identify critical and near-critical paths using the actual plan. Ask the people accountable for each job to estimate realistic durations; use Action Points only to check each owner's personal fullness before work is pulled. Include scarce reviewer, supplier and facility capacity. Preserve assumptions about durations and external inputs; do not hide contingency inside arbitrary task estimates.

The scheduler maintains plan integrity, domain owners provide evidence-based progress, and the authorized governance role approves commitment changes. Preliminary Design Review (PDR) and Critical Design Review (CDR) dates are coordinated with their defined evidence criteria. A review date alone does not prove readiness for that review.



Connect the schedule to one agenda

The integrated schedule remains authoritative for work packages, dependency logic, calendars, dates and the approved baseline. When a forecast, schedule change or handoff needs a visible next move, record a Schedule Action on the shared agenda and link it to the source schedule item. Link it to related actions with distinct results and owners: for example, a User Action in a domain set and a Risk Action in an authorized Intersection Zone shared by two domains. The links reveal the dependency without copying the schedule into another task list.

Review evidence

Compare baseline and forecast, inspect late handoffs and analyze whether available float or resequencing can absorb change. Identify the latest useful decision date. Monitor forecast accuracy over time and explain why predictions changed. Do not turn a forecast range into a guarantee by removing its uncertainty from the executive report.

Aster example

Connector receipt on Day 55 plus assembly and inspection produces Day 76 availability against Day 45 handoff. Timeline makes the 31-day handoff variance explicit. The scheduler analyzes the downstream effect on Day 65 review while its baseline remains Day 65 pending authorized change.



07 Alignment coordinate the whole project

The Synchronization: connect scope, people, engineering domains and shared handoffs to the agreed outcome and plan.

ALIGNMENT / COORDINATE THE WHOLE PROJECT

Domain work meets in an Intersection Zone, then proceeds or asks Staff for a decision.

DOMAIN COMMITMENTS

AVIONICS

Integration input • owner

ELECTRIC POWER

Interface version • authority

PROCUREMENT

Supplier receipt • owner

SHARED COORDINATION

INTERSECTION ZONE

Interface handoff

Sender • receiver • version • condition

Shared reviewer capacity

Need-by date • competing commitment

Resolve here, or request Staff authority.

AUTHORIZED STAFF DECISION

Resolve the trade-off
Record and return the decision

ONE INTEGRATED PROJECT OUTCOME

Usable inputs arrive together
with evidence and a ready receiver

ONE SHARED AGENDA

Linked domain and intersection actions • accountable owners • dependencies • decisions • next reviews
Source engineering and schedule records keep their authority; the agenda makes the next move visible.

STAFF AGILE

ALIGNMENT / EXECUTIVE LIFECYCLE

Executive purpose

Alignment ensures that each domain's local plan supports the same project outcome. A program can contain several individually reasonable plans that compete for one specialist, assume different interface versions or depend on incompatible delivery dates. STAFF makes those conflicts visible through domain sets, Intersection Zones and linked actions.

Decisions and working records

Maintain the topology map, interface and dependency records, capacity commitments, stakeholder decisions and cross-domain action queue. Each handoff has a sender, receiver, required configuration, need-by date and acceptance condition. Each shared decision has an authorized owner. An Intersection Zone coordinates these responsibilities without replacing specialist authority.

Use the Staff meeting cascade to resolve exceptions at the lowest competent level. When priority changes, record which work waits, which domains replan and which stakeholders need an update.



Review evidence

Review the evidence needed for the next integrated decision: unacknowledged handoffs, competing resource commitments, unresolved dependencies, mismatched configurations and decisions nearing their useful deadline. A routine User Action may need only its recorded completion; do not impose an evidence package on every Action. Ask whether the next integrated outcome is achievable and whether anyone has capacity to review and join the work.

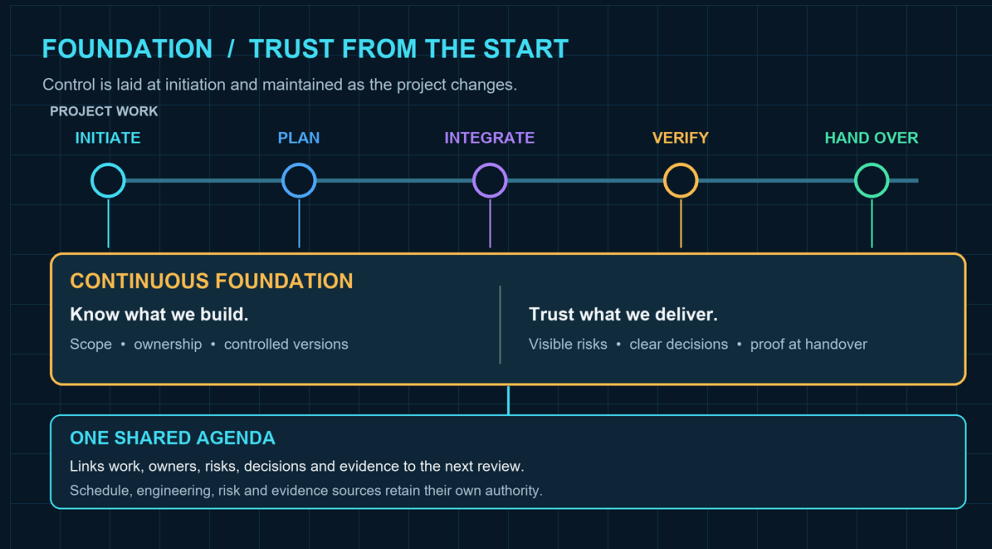
Aster example

The Power Intersection Zone brings Avionics, Power and Procurement together to reconcile the interface and supplier constraint. The coordinator ensures follow-through; Power retains electrical authority and Procurement owns the supplier commitment. A shared reviewer conflict goes to the appropriate resource authority.



08 Foundation maintain trustworthy controls

The Integrity: establish trustworthy scope, records, controls and decision rights from the beginning.



Executive purpose

Foundation is the control environment that makes delivery claims reviewable. It includes the work breakdown structure (WBS), approved scope, risk and issue records, governance baselines, configuration control and applicable evidence requirements. It begins during initiation and evolves under change control. It is not a late-stage paperwork exercise before handover.

Decisions and working records

Define record authority, approval rights, access, retention and change rules. Keep the shared agenda linked to the organization's existing schedule, risk, engineering and evidence sources. Maintain a requirements-to-evidence relationship and a controlled record of decisions. Where a compliance obligation applies, its authorized interpretation determines the required evidence and approval route.

The project manager coordinates controls with planning, quality, configuration and technical authorities. The shared agenda links to source records; it does not replace their authority or require duplicate entry.

Review evidence

Sample whether baselines have authorized changes, evidence references identify the relevant configuration, risks have active owners and integration failures are visible. Examine stale data, broken links, conflicting copies and missing approvals. Report assurance gaps directly instead of treating a complete-looking record as proof of compliance.

Aster example

Foundation checks the authority and freshness of Aster's controlled records. The interface requirement is approved, drawing revision D has a named configuration owner, and the Day 65 review baseline has an authorized change route. When a supplier feed is stale, the dashboard marks its age and the responsible system owner reconciles it. Foundation does not certify the connector itself; it makes clear which approved record and decision may be trusted.



09 Fulfillment deliver and close responsibly

The Payoff: obtain authorized acceptance of the agreed scope and prepare the recipient to use the result.



Executive purpose

Fulfillment is more than finishing tasks. It brings together verified scope, customer or sponsor acceptance, operational readiness and closure of applicable obligations. Agree the acceptance and handover approach early so teams can build the required evidence throughout delivery. Project completion and realization of long-term benefits may occur at different times.

Decisions and working records

Maintain the acceptance matrix, evidence package, open-item register, handover plan and closure record. Confirm the recipient's readiness: documentation, training, support ownership, configuration information, spares or transition activities where applicable. Track contractual deliverables and obtain disposition from the authorized parties. A team board cannot close a contractual requirement merely by closing its action.

Record residual risks, warranties, follow-on work and any permitted conditional acceptance with owners and dates. The governing process determines whether conditions are allowed. Close financial and administrative obligations through the applicable organizational processes, and identify who will monitor benefits after the project team disperses.

Review evidence

Assess accepted scope against agreed criteria, unresolved mandatory items, recipient readiness and handover acknowledgment. Measure overdue closure actions and later operational feedback. Do not let a high action-completion rate obscure an unresolved acceptance blocker or missing support owner.

Aster example

Accepted interface and integration evidence supports the demonstrator handover decision. Aster's Day 65 review is not itself regulatory authorization or automatic contract closure. The designated recipient acknowledges the agreed deliverables, and remaining obligations are retained with explicit owners.



10 Executive review and the control room

A shared view helps leadership choose the next useful decision and return it to the work.

EXECUTIVE / ONLINE CONTROL ROOM

L4 or L5 selection / authorized portfolio or enterprise scope | Illustrative data cut: Day 60



Three of nine Highlights shown. L4/L5 filters select work needing this authority. Open only permitted source records.

The control room

The control room is an online executive view of the same authorized records. It shows program outcomes and commitments beside Highlight requests, late Actions, upcoming finishes and domain-level dependencies. Deputy General Managers, C-level leaders and General Managers see information within their responsibilities and permissions.

Put the requested decision, accountable authority, owner, latest useful response date, options and uncertainty beside each exception. Link from the summary to the action and its authoritative source. Restricted Staff actions stay restricted; use an approved summary when a broader audience needs awareness.

Prepare before the review

Owners update their Actions, current forecasts and source links. The meeting organizer brings all Highlight topics and any other Actions they consider necessary to the relevant Staff meeting. Show overdue work and approaching commitments as well. Confirm data freshness and identify unknown information instead of treating it as a positive status.

A thirty minute starting agenda

Begin with the intended outcome and the few exceptions that need executive action. Review each option, the responsible authority and the latest useful decision time. Close by recording the decision, owner and next review on the same Action. Thirty minutes is a starting timebox, not a required meeting length.

Aster example

Aster's control room opens on the Day 76 connector handoff forecast, the missed Day 45 target and the possible effect on the Day 65 demonstration. The manager sees two recovery options, their owners, the supplier acknowledgment and the technical dependency without opening a second issue list. The authorized executive chooses a response; the engineer receives it on the original Action and updates the next move.



PART 02

Operation Principles

The common agenda, actions, flow, access and timely signals

ONE CONNECTED SYSTEM

Domain intersections

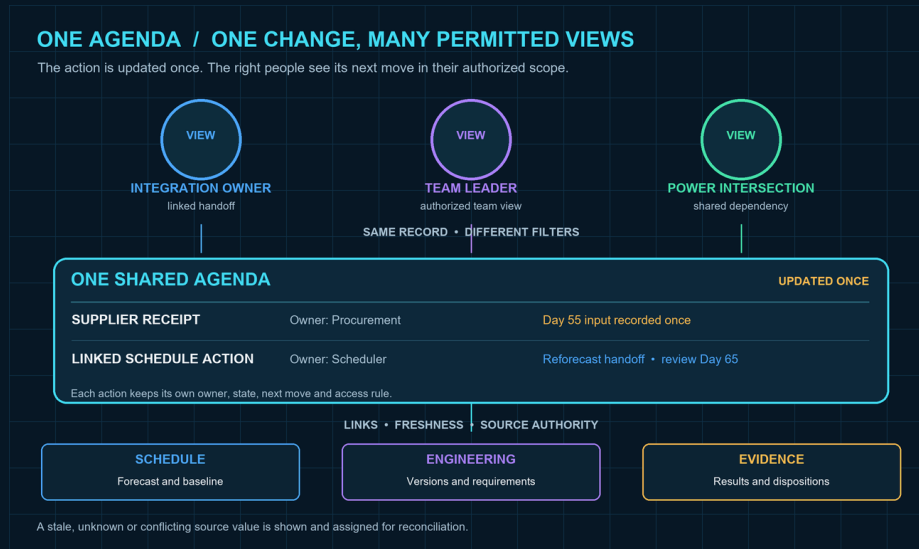
One owner per Action

Flow toward the goal



11 One Agenda and trusted records

One common record supports authorized owner, domain, Staff and intersection views.



One underlying agenda

There is one underlying agenda for the organization. Each person uses filtered views of work they own, contribute to, receive or coordinate. A filter changes the view, not where the action lives. Update the record once. A private Staff action and a shared domain action can live in the same system while having different access scopes.

A useful action has a readable job, primary dimension and action type, one accountable owner, intended result, current work state and next review. Add contributors, receiver, dates, dependencies and source links as needed. Highlight is a separate attention field with a destination level. The action always shows who has the next move.

Linked records keep their authority

The agenda points to records where authority already resides. The integrated schedule owns logic, baselines and forecasts; engineering systems own requirements and configuration; controlled repositories hold approved results and dispositions. The agenda shows who needs a record, why it matters and whether the link is current. It does not create a competing copy of any source.

Define which system owns each exchanged field, when it was refreshed and who resolves a disagreement or outage. Show stale and unknown values explicitly. Link sensitive records through their controlled source and honor their access permissions.

Aster example

Procurement updates the supplier receipt input once. The integration owner, Team Leader and permitted Power Intersection Zone members see the linked change in their views. The scheduler updates the authoritative forecast; the agenda links the resulting date gap and next decision.



12 Nested Staff meetings and decision rights

Generic organizational levels route selected requests upward and decisions back to their owners.

STAFF AREAS / WORK ON THE SAME ACTION

Authorized people bring work into the area where support or discussion is needed.

TEAM LEADER

Reviews Highlight items
May resolve the issue locally

MANAGER STAFF

Manager and reporting Team Leaders
Discuss shared priorities and capacity

DIRECTOR STAFF

Director and reporting Managers
Discuss work needing this authority

ONE ACTION / DISCUSSION, DECISION AND NEXT MOVE

Highlight is optional. Ordinary Actions may also enter an authorized Staff area.

The Action keeps its owner and permissions; the response is recorded on the same record.

Use the organization's real roles

A Team Leader works through the main domain agenda and joins Manager Staff with other Team Leaders and the Manager. Manager Staff handles decisions in that management scope, including access-controlled private Actions. Director Staff brings Directors and Managers together; C-level or General Manager Staff handles enterprise decisions beyond lower delegation. Organizations may use different titles and depths while keeping the same authority logic.

Each meeting reviews its authorized scope of the common agenda. Staff membership identifies the people who may work on private or special leadership actions in that Staff set; it does not create a second action database. The domain and Staff access matrix appears in the next chapter.

Discuss Highlight items and other work that needs attention

Before the meeting, owners update dates, blockers, new results and the decision needed. Discuss all Highlight items at this level and any other Actions the meeting organizer considers necessary. Show late work and approaching commitments that need coordination. Record decisions within this level's authority. If wider authority is needed, an authorized person can change the Action's Highlight level and bring the same Action into the relevant Staff area.

Separate decision rights

Priority, expenditure, baseline changes, risk acceptance and technical acceptance may have different authorities. For each decision name the accountable role, delegated limit, consultation, required information and substitute. A meeting coordinator arranges the discussion; the designated authority grants a reserved approval.

Record the decision on the same action and return it to the owner. Routine delegated work continues between meetings. Cadence can vary with the organization and the urgency of the work.

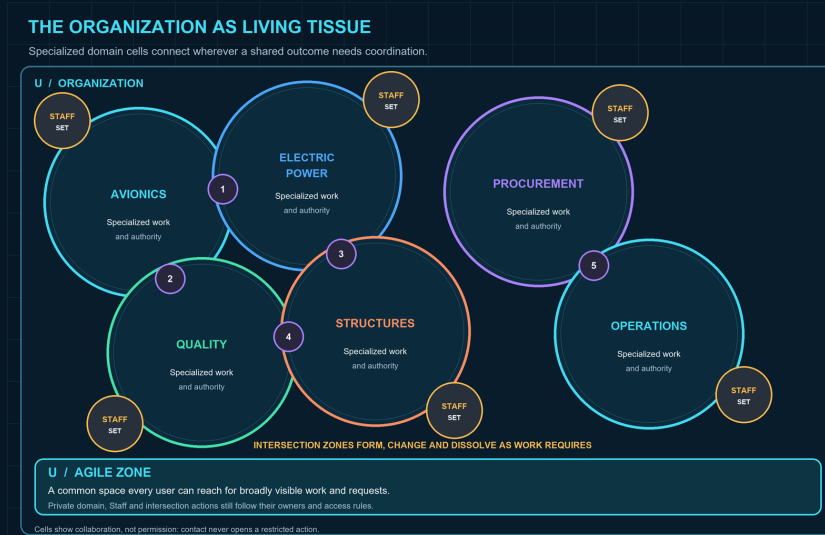
Aster example

The engineer Highlights User Action-2635. The Team Leader reviews it and can bring the same Action into Manager Staff when two teams need the same reviewer. The Manager and reporting Team Leaders discuss the conflict. If a higher decision is needed, an authorized person changes the Action's Highlight level and places it in the relevant Staff area. Discussion and decisions stay on the same record; the engineer remains accountable.



13 Domains Staff sets and intersections

Stable ownership and explicit permissions support temporary shared work without losing accountability.



Domain sets and Staff sets

A domain set is a stable expert group with its own work and authority, such as Avionics or Procurement. A Staff set is an authorized management area. Manager Staff, for example, includes a Manager and the Team Leaders reporting to that Manager. It handles decisions in that scope and private leadership or personnel Actions shared with authorized members. The sets connect through permitted views without exposing private Staff Actions to the entire domain.

Domain sets carry their own specialist work, and Staff sets coordinate decisions in their management scope. When two or more teams work together on a shared result, create an Intersection Zone for that work. It gives authorized participants a common view of the result and linked Actions. Close the zone when the shared work ends, or update its scope when the need changes. These connections can occur across the organization, not only along a reporting line. Directorate-wide shared work can take place in Director Zone, and broader executive work can use C-level Zone. Agile Zone is accessible to all users for broadly visible work. Set membership and each Action's access rule still determine what a person may open.

An Avionics engineer sees permitted Avionics work. The Team Leader sees authorized domain Actions and, as a Manager Staff member, the private Actions explicitly shared with that group. A Manager sees the managed domain scope and authorized Manager Staff records. Membership and each Action's access rule determine visibility; a job title alone does not.

Create only the intersections the work needs

An Intersection Zone is a temporary view of real shared work, not a separate agreement or approval body. The linked actions already name their accountable owners, participating domains, necessary authority, input versions, receiving conditions and next reviews. Add an authorized participant when that person must contribute. A coordinator can help follow several connected actions but does not replace their owners. Let the zone close or change shape when the shared work changes instead of making every overlap a permanent meeting.



One domain can participate in more than one zone. A later integration-readiness overlap may involve Quality and Structures even though the current connector zone involves Avionics, Electric Power and Procurement. Create the second overlap when the shared review is needed.

Preserve the handoff

Make a handoff between teams visible in the relevant Intersection Zone. The sender identifies the input and version. The receiver acknowledges a usable handoff or records the discrepancy and missing condition. Until the agreed condition is met, the sender retains responsibility for making the input usable. An acknowledged ownership transfer is a new accountable assignment, not proof that a different deliverable is complete.

Keep the same agenda item when the result and accountable owner remain the same. For a distinct result or owner, create a linked action or record the acknowledged transfer. For each boundary show sender, receiver, input version, need-by date and next move. Missing inputs, incompatible versions, unavailable reviewers and unowned handoffs are risks in the connections.

Access matrix

Role	Agile Zone	Domain Area	Manager Staff	Director Staff	C-level Staff	Intersection
User	✓	✓	✗	✗	✗	✓
Team Leader	✓	✓	✓	✗	✗	✓
Manager	✓	✓	✓	✓	✗	✓
Director	✓	✓	✗	✓	✗	✗
C-level	✓	✓	✗	✗	✓	✗
GM or CEO	✓	✓	✗	✗	✓	✗

Agile Zone is accessible to every user. In the other columns, a check mark shows a role's normal working area; it does not open every Action automatically. An X means no routine participation in that area. Day-to-day intersection work normally involves the relevant User, Team Leader and Manager. A Director or executive joins a specific intersection only when explicitly authorized for that work or decision. The Action's scope and the linked source's permissions always apply. Highlighting requests attention, not access; provide explicit permission or a permitted summary when the decision authority needs it.

Aster example

Aster's Manager Staff records a private User Action to prepare an individual performance conversation. Only the manager and explicitly authorized participants can see its details. The Power Intersection Zone separately shares connector configuration Actions among Avionics, Electric Power and Procurement. Membership in that zone does not expose the private personnel Action.



14 Action dimensions and action types

Thirteen dimensions organize the work; twenty five single action types clarify what each job produces.

13 DIMENSIONS / CHOOSE THE TYPES YOUR WORK NEEDS												
User Action is the base type in every project; specialist types describe more specific jobs.												
EXAMPLE / SCHEDULE AND PLANNING Schedule Action OR Planning Action NEED BOTH RESULTS? Create two separate actions. Use either type alone when it fits the job. Link them when one depends on the other.												
DIMENSION	AVAILABLE INDEPENDENT ACTION TYPES											
01 Schedule and Planning	Schedule Action								and/or	Planning Action		
02 Risk and Issue	Risk Action								and/or	Issue Action		
03 User Action (basic)	User Action											
04 Lessons Learned	Lesson Action											
05 Customer, Market and Stakeholder	Customer Action								and/or	Market Action / Stakeholder Action		
06 Configuration and Change	Configuration Action								and/or	Change Action		
07 Quality and Compliance	Quality Action								and/or	Compliance Action		
08 Supply and Logistics	Supply Action								and/or	Logistics Action		
09 Resource and Capacity	Resource Action								and/or	Capacity Action		
10 Finance and Cost	Finance Action								and/or	Cost Action		
11 Interface and Integration	Interface Action								and/or	Integration Action		
12 Verification and Validation	Verification Action								and/or	Validation Action		
13 Governance and Reporting	Governance Action								and/or	Reporting Action		
Use one type for one job, or both types as separate actions when there are two distinct results.												

What taxonomy means

Taxonomy is the shared classification vocabulary used to find, filter and discuss work. A dimension groups related kinds of work; each action type beneath it is a separate kind of job. Every project includes User Action as its base type for ordinary work; specialist types classify jobs that need a clearer distinction. An organization may use only one type from a pair, the other type, or both types as its work requires. When both distinct jobs occur, record them as separate actions and link them if they depend on each other. Each individual action selects one primary dimension and one action type. Add a secondary tag only when it helps a real decision. Classification does not create departments or change authority.

For example, Schedule and Planning offers two independent choices. Use a Schedule Action alone to recalculate a forecast, a Planning Action alone to prepare a material plan, or both as separate linked actions when the project needs both results. Do not create two records for one result merely because two type names exist. Neither is a combined “Schedule and Planning Action.” Every action keeps one accountable owner and a clear result.

01 Schedule and Planning

Schedule Action

Maintain a dependency, milestone or forecast derived from the integrated project schedule. The action links the source schedule item and its planning owner; closing the action does not itself change an approved baseline.

Aster example: Recalculate the connector handoff forecast after the supplier receipt moves to Day 55.

Planning Action

Prepare a plan for future work, materials, facilities or a review. It defines how a result will be achieved and the assumptions to test. A material plan and an updated schedule line can be distinct linked results.

Aster example: Prepare a material and bench-slot plan for the remaining assembly and inspection.



02 Risk and Issue

Risk Action

Respond to an uncertain future event. Name the risk record, response owner, trigger or due point and how the response will be checked. Reassess remaining exposure after the response.

Aster example: Arrange an alternate connector route before the supplier delay becomes unavoidable.

Issue Action

Resolve a condition that already exists. State its present impact, owner and required resolution; link any risk or recovery action.

Aster example: Resolve the confirmed connector delivery gap now shown by the supplier acknowledgment.

03 User Action

User Action

User Action is the basic Action type available to every person and project. Use it for a clear job when a specialist type adds no useful distinction, including a simple training or follow-up task. Give it one owner, a next move and an agreed completion condition. If later work needs a different decision or result, link a specialist Action rather than copying the task.

Aster example: Prepare the bench checklist for the next connector assembly.

04 Lessons Learned

Lesson Action

Turn reviewed experience into an implemented improvement. Name the affected process or domain, implementation owner and a check of adoption. Sharing a lesson alone does not complete an implementation action.

Aster example: Update the receiving checklist after a connector-label mismatch and test it at the next receipt.

05 Customer, Market and Stakeholder

Customer Action

Respond to a named customer's request, feedback or delivery need within the agreed relationship and scope. Route scope changes through the appropriate authority.

Aster example: Clarify which demonstration output the Aster recipient needs on Day 65.

Market Action

Investigate broader market demand, alternatives or a commercial opportunity. Record the hypothesis, information needed and decision it will support.

Aster example: Assess whether the demonstrator capability addresses a wider operator need before proposing new scope.

Stakeholder Action

Obtain a decision, agreement or commitment from a person or group affected by the work. Record who must respond and the consequence of delay.

Aster example: Confirm the demonstration team's revised receiving arrangement.



06 Configuration and Change

Configuration Action

Identify or maintain the controlled identity and version of a product, drawing, requirement or record.

Aster example: Confirm that the connector calculation and assembly use drawing revision D.

Change Action

Assess, obtain authorization for or implement a proposed change. Link its impact, authorized decision and affected records.

Aster example: Assess a proposed revision E, obtain its designated approval and update affected handoffs.

07 Quality and Compliance

Quality Action

Address conformance, process quality or a nonconforming result. Name the applicable criteria and responsible quality role.

Aster example: Resolve a connector-label mismatch found at receipt.

Compliance Action

Establish or demonstrate how a defined external or internal obligation is met. Its authorized interpretation determines the evidence and approval route.

Aster example: Confirm the applicable demonstration documentation obligation with the designated authority.

08 Supply and Logistics

Supply Action

Obtain or manage an externally supplied part or service and its supplier commitment.

Aster example: Obtain a confirmed connector shipment commitment and source acknowledgment.

Logistics Action

Move, receive, store or distribute an input so the next owner can use it.

Aster example: Arrange connector receipt, handling and delivery to the integration bench.

09 Resource and Capacity

Resource Action

Secure a named person, facility, equipment item or capability required by the work.

Aster example: Reserve the inspection bench and a qualified reviewer.

Capacity Action

Resolve competing commitments or insufficient available room over a defined window. Keep the owner's Action Points private and use actual availability for the decision.

Aster example: Agree which review waits when two teams need the same specialist.

10 Finance and Cost



Finance Action

Arrange or control funding, authorization, payment or a financial obligation.

Aster example: Obtain the delegated funding authorization for an expedited delivery option.

Cost Action

Estimate, analyze or track the cost consequence of work or an option.

Aster example: Compare the incremental cost of expediting with the cost of the delayed handoff.

11 Interface and Integration

Interface Action

Define or reconcile a boundary between products, domains or organizations, including its input, version and receiving condition.

Aster example: Resolve the connector specification at the Avionics and Electric Power boundary.

Integration Action

Combine contributions into a usable larger result and check their joint operation or readiness.

Aster example: Prepare the assembled and inspected connector handoff for the integration lab.

12 Verification and Validation

Verification Action

Check a result against a stated requirement or specification using the applicable method and configuration.

Aster example: Check the power-interface calculation against drawing revision D and the agreed limit.

Validation Action

Evaluate whether the result meets the intended use or user need in its relevant context.

Aster example: Confirm that the demonstrator supports the agreed operating scenario.

13 Governance and Reporting

Governance Action

Establish or obtain an authorized decision, delegation or governance control. A request states the exact decision needed.

Aster example: Obtain the correct authority's disposition on a proposed commitment change.

Reporting Action

Produce a defined communication or status record for an identified recipient and decision. Avoid maintaining a duplicate action list.

Aster example: Prepare the executive Highlight summary with the gap, options, owner and next review.

Review the vocabulary

Keep type names stable enough for searching and reporting. When useful jobs repeatedly cannot be classified, review the vocabulary with the people using it. Avoid adding a new type for every local synonym. The action title still describes the actual verb and result.



15 Design and write actions

Use the common fields the work needs, alongside type-specific information, clear identities and an accountable next move.

Field management

Keep the common fields that the work needs and every part of the company can understand: action ID, verb-first job, primary dimension and single action type, accountable owner, intended result, work state, access scope and next review. Record Finish Date, Target Date, dependency, receiver, Highlight request and source link where the job needs them. A field earns its place when someone uses it to act, decide, find work or verify a result; do not make every optional field mandatory for every action.

Add a short type-specific group only where the work requires it. A Schedule Action can link the authoritative activity and forecast assumption. A Risk Action can link its trigger and response record. A Configuration Action can carry an optional Change Notice (CN) number, affected item, current approved revision and linked decision. The CN number identifies the controlled source record; the action does not become a second change register.

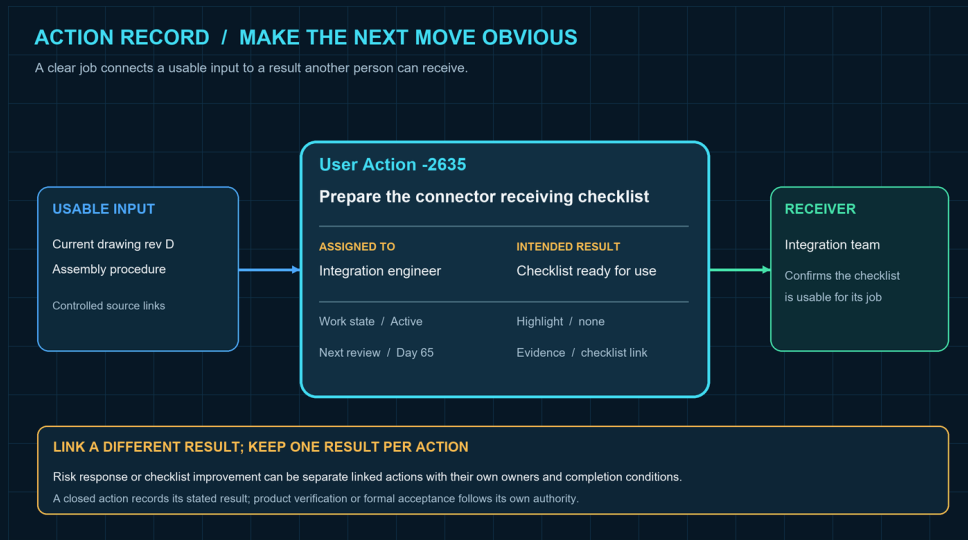
Use plain labels, examples and a named source for each specialized field. Define who may edit it, which system owns the value and who resolves a stale or conflicting value. Review unused fields with their users and remove them from the default view. Filters may show different fields to different roles while all authorized people work from the same action.

Identities on an action

Every action has one accountable owner, shown as Assigned to. That person keeps the next move visible and records the result. Other identities are optional relationships to the work: a Maintainer will sustain the result, a Partner contributes or supplies an input, and an End User will receive or use it. A person or named group may fill more than one optional role when that is meaningful; do not create a second accountable owner by adding a role.

Keep Contributor, Receiver and Reviewer where those responsibilities are relevant. State what each person must do and which handoff or decision they own. A role label alone does not grant access to private Staff work, an Intersection Zone or a controlled source. Apply the action scope and linked-source permissions, and give an authorized summary when a participant needs a decision without permission to read the full record.

For Aster, the avionics integration engineer is Assigned to User Action-2635. Procurement is a Partner supplying the receipt acknowledgment, the integration lab is the Receiver and End User of the usable handoff, and the designated engineer or quality specialist may be its Reviewer. The action retains one owner while the other identities explain how the result moves.



Make the job operable

Use a verb-first title, one accountable owner, usable input, relevant dependency and clear result. Specify a receiver or reviewer when needed. Agree whether supporting evidence is required and by whom. Create an action when someone must produce a result, resolve a dependency, reduce uncertainty or carry out a decision. A meeting note or idea becomes an action when it has an accountable next move.

Name its primary dimension and single action type, access scope, work state and dates. Add the separate Highlight flag and level only when attention above the owner's level is requested. Keep source links and next review visible. One action can appear in several authorized views without being copied.

Connect risk and lesson work

A Risk Action links its response, owner, trigger and due point to the risk record. Completion prompts reassessment; remaining risk receives the appropriate disposition. A Lesson Action uses reviewed experience to change a checklist, requirement, handoff or decision rule. Link either Action to affected Schedule, Customer or other Actions when the change matters to their next move. Name the implementation owner and check adoption.

Publish lessons and make risks visible

Publish reviewed and approved Lesson Action results across the organization with the change to implement and its owner. Make lessons easy for teams to find and use, then check that the change was adopted. Show Risk Action status, impact, response and owner in the relevant domain and management views. Keep sensitive details within their permitted scope and provide an authorized summary for risks with organization-wide consequences. Preserve links to the source record and decision history.

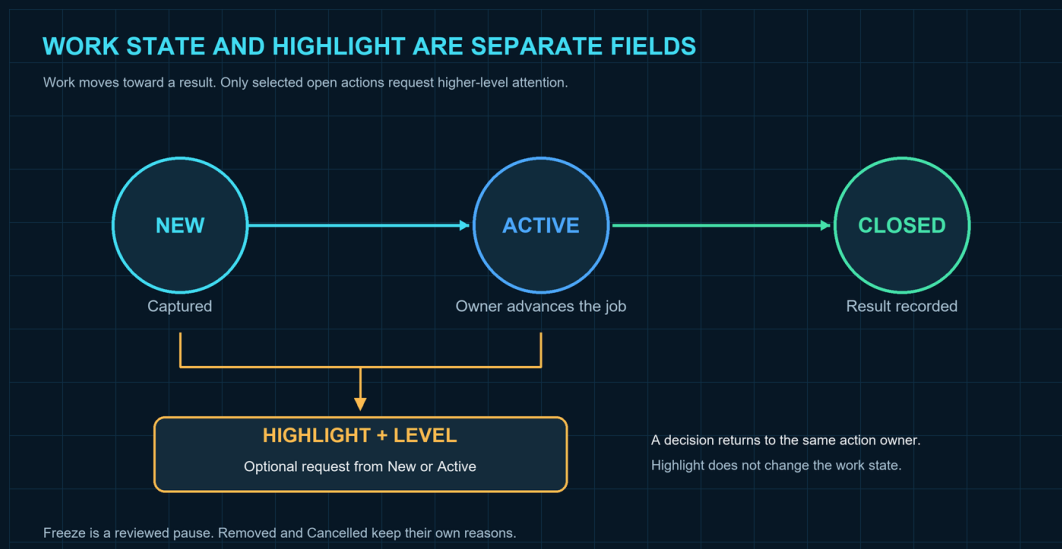
Aster example

Recalculate the connector handoff forecast using the supplier acknowledgment is a Schedule Action owned by the scheduler. The acknowledgment is its input and an updated forecast with assumptions is its result. A later receiving-checklist improvement is a linked Lesson Action with a different owner and completion condition.



16 Action status and Highlight

Action status shows progress. Highlight marks needed attention; authorized people may move the same Action among the working areas it needs, with or without Highlight.



Three work states

New means captured work that has not started. Active means the owner is advancing the job. Closed means the owner records the completed result. An ordinary action can move from New to Active to Closed without being highlighted. Store state separately from Highlight so the system does not force every job through a management-attention step.

Route Highlight through authorized areas

When an engineer Highlights an Action, the Team Leader sees the marked work. The leader reviews it, resolves it within their authority or moves the same Action into an authorized Manager Staff area for discussion. The Manager and Team Leaders discuss it there. Add discussion, decisions and next steps to the Action; it can then return to its domain area. The leader may also bring an ordinary Action into Manager Staff without Highlight.

If the issue needs wider authority or collaboration, an authorized person changes the Action's Highlight level when needed and moves the Action into Director Staff or a suitable Zone. Authorized people may place shared work in an Intersection Zone, directorate-wide work in a Director Zone, executive-wide work in a C-level Zone, or work meant for everyone in Agile Zone. A Director may move an Action to another domain; if that domain needs a distinct result or owner, create a linked Action.

The work remains one Action across these areas. Moving it does not automatically change its owner or status. Only people authorized for the area and linked source may see its details. Highlight grants no new access and does not mean the Action is late. Record discussion, impact, options, decisions and the next move in the same Action; clear Highlight when higher-level attention is no longer needed.

Pause and final dispositions

Freeze is a temporary pause with a reason, responsible person and review date. Show a blocker and its resolver rather than hiding started work. Removed means the action is no longer needed; Cancelled means an authorized person stopped it. Preserve these reasons separately from successful closure.



Useful progress and result fields

A Flow Increment is a bounded advance in capability, knowledge or decision readiness, such as an analysis, a disposition or a usable input. Teams can use continuous pull or a suitable local rhythm. Record completion and any required review in result fields. Closing the action and receiving a reserved technical or contractual acceptance are different decisions.

Aster example

Aster Aviation's User Action-2635 stays Active when its engineer Highlights the connector date gap. The Team Leader can resolve the issue or move the Action into Manager Staff for discussion. If wider authority is needed, an authorized person changes its Highlight level and moves the Action into Director Staff. Discussion and decisions remain on the same record, which can return to the engineering domain. The engineer closes it only when the receiver acknowledges a usable input and the agreed completion condition is recorded.

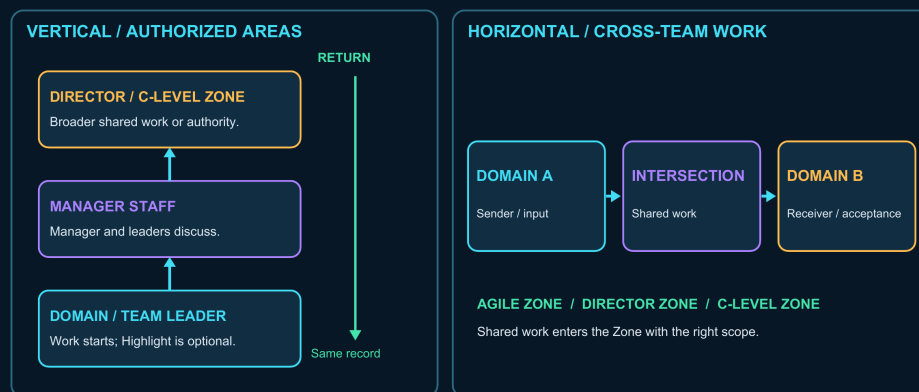


17 Highlight levels and work across authorized areas

An Action can move into the Staff or Zone where it is needed, then return to its domain work. Cross-team handoffs run through the relevant Intersection.

HIGHLIGHT / WORK ACROSS AUTHORIZED AREAS

The same Action is discussed in authorized areas and returns to the work.



The view changes; the Action, owner and access rules remain.

Highlight levels

Adapt Highlight levels to the organization's actual management structure. In the generic example, L1 is Team Leader, L2 is Manager, L3 is Director, L4 is Deputy General Manager or C-level, and L5 is General Manager or CEO. These levels are not work states or a separate decision process; they identify where the Action needs attention. When an engineer Highlights work, the Team Leader sees it. The leader can review it directly or bring the Action into an authorized Manager Staff area for discussion.

An ordinary Action can also enter the relevant Staff area without Highlight. Manager Staff consists of the Manager and reporting Team Leaders and discusses the work it needs to share. When a broader authority or joint effort is needed, an authorized person can change the Action's Highlight level and place it in Director Staff or the relevant Zone. An Action need not pass through every level; place it only where the work and permissions require.

Continue work across authorized areas

While an Action is discussed in a Staff or Zone area, add the discussion to its Discussion field and record results in the appropriate fields. The Action can then return to its domain view, where the owner continues the next move on the same record. Changing its area does not create a new Action, a second decision flow or an automatic ownership transfer. Highlight grants no access. Only people authorized for the area and linked source can read its details.

Use the Zone that fits shared work

When two domains work together, an Action may run Domain–Intersection–Domain. The sender identifies the input and version; the receiver acknowledges usability or records the missing condition. Work visible to everyone can enter Agile Zone. Shared work within a directorate can enter its Director Zone; broader executive work can enter a C-level Zone. An authorized person places the Action in the appropriate Zone. Create a linked Action when a distinct result or owner is needed.



Human Resources Director Zone example

Suppose Human Resources has four departments, each with two Team Leaders. A Team Leader starts a company event Action. If the event needs the whole directorate, an authorized person brings the Action into HR Director Zone. The four departments coordinate their contributions there, and discussion and results stay on the Action. A suitable announcement or broadly shared task can also appear in Agile Zone when the whole company needs to participate. Each area shows only details its members are authorized to see.

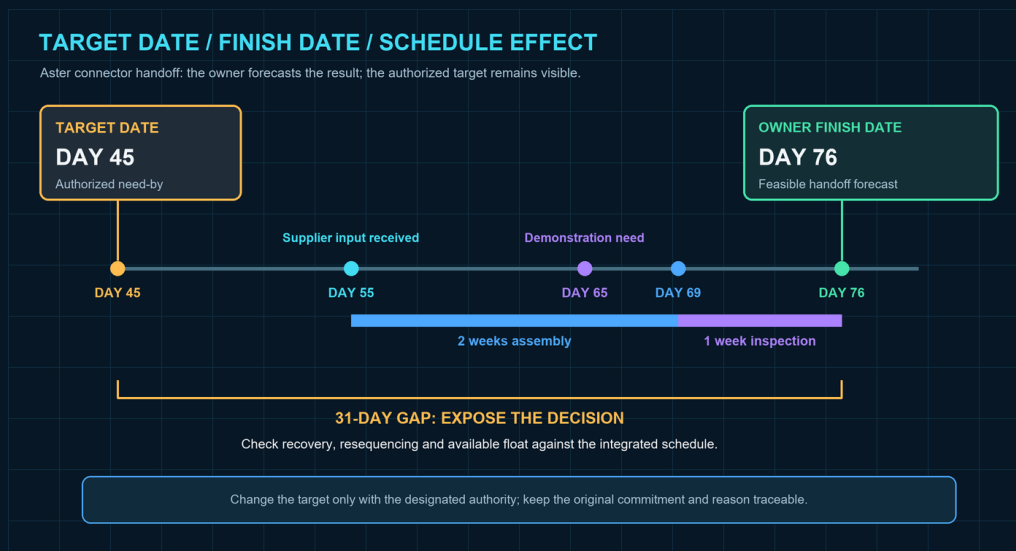
Aster example

The engineer Highlights the Day 76 forecast against the Day 45 target on User Action-2635. The Team Leader reviews it and can bring the Action into Manager Staff to discuss a reviewer conflict. If a wider program choice is needed, an authorized person places the Action in Director Staff. Meanwhile, Procurement confirms the supplier input and Power Intersection Zone coordinates the shared configuration. Discussion is added to the same record; the Action returns to its domain work with the engineer still accountable.



18 Finish Date Target Date and forecast

Compare the owner's finish forecast with the need-by date. When the target changes, preserve the old date and the reason so capacity and delivery decisions remain explainable.



Keep four date meanings clear

Finish Date: the accountable owner's current forecast with known scope, inputs, capacity and dependencies. Update it when the facts change. Target Date: the need-by date set by a Leader, Manager or program engineer to protect a handoff, review or commitment.

The program schedule shows when connected jobs are planned to happen. Keep its approved starting version as the reference for the original commitment. The current schedule shows when those jobs are now expected to finish. For example, a late supplier input moves the dates of the assembly and inspection that depend on it. Link an Action's Finish Date and Target Date to the relevant scheduled work; do not copy the whole schedule into the shared agenda.

Make the gap a decision

Aster's Day 76 Finish Date against a Day 45 Target Date exposes a 31-calendar-day gap. Check the inputs behind the forecast and the effect on later work. Options include removing a blocker, obtaining qualified support, resequencing, or splitting an independent result into a linked Action. Preserve the owner's realistic finish forecast while discussing the options.

Record why a Target Date changes

A Target Date may change, but only an authorized person approves the new date. Keep the old and new dates, the approver, the decision time and the reason on the same Action. Choose a clear reason category, such as waiting for customer input, insufficient capacity, planning error, supplier delay or scope change, and add a short explanation when needed. Reviewing these reasons across Actions reveals capacity problems and helps teams develop responses to repeated delays. The history provides a reliable Foundation decision record and explains how the delivery commitment changed for Fulfillment.



Forecast from evidence

Keep near work specific and distant work broad enough for uncertainty. When an input changes, update downstream logic and actual capacity. Analyze critical and near-critical paths using schedule logic. A closed action supplies evidence about its result; action counts and Action Points do not establish schedule percentage complete or replace the approved progress method.

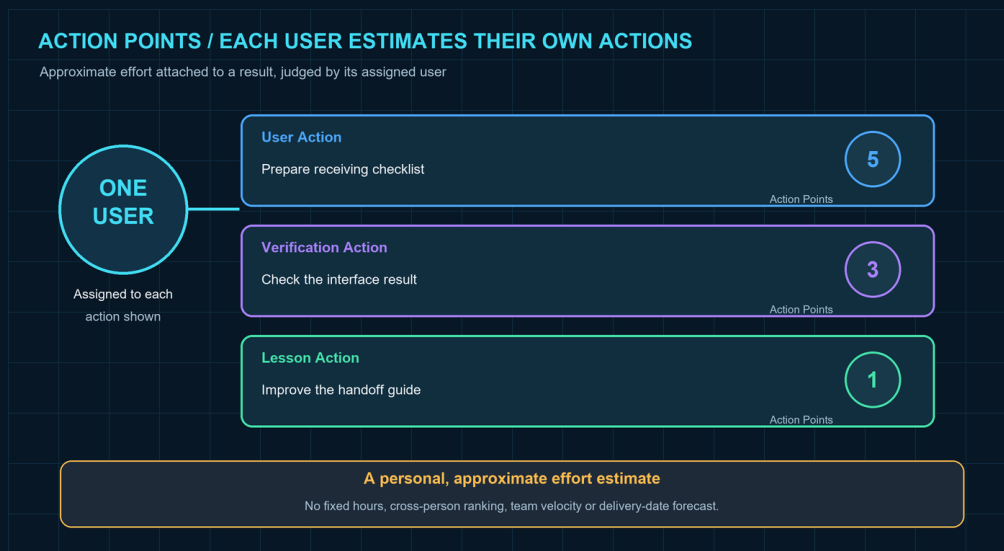
Aster example

The supplier's Day 55 receipt is an input date. User Action-2635 has two calendar weeks of assembly and one calendar week of inspection still to complete, so its Finish Date is Day 76. Its Target Date remains Day 45 until the authorized role changes it. The scheduler checks whether recovery, resequencing or available float can protect the Day 65 demonstration.



19 Action Points for personal effort

Each action owner estimates the approximate effort of their own actions; the schedule predicts delivery dates.



The assigned user estimates their own action

Action Points are a rough estimate of the effort an Action will take. The person assigned to the Action enters the points for their own work and updates them when the work changes. Each person uses their own experience to judge their Actions; a leader does not give everyone a common point value.

How Action Points differ from Story Points

A team commonly estimates Story Points together and uses them to understand its own delivery pace. This can help one team plan. In a large defense or aviation organization, however, many disciplines, teams and authority boundaries are involved. Adding team points does not reliably show organization-wide capacity or an individual's workload. Action Points instead let each person estimate the approximate effort of their own Actions. They support a discussion of that person's workload and capacity, not a shared team velocity.

A personal Fibonacci example

A user may use 1, 2, 3, 5, 8 and 13 as rough relative effort anchors. For that user, 1 may mean a small familiar action, 3 a moderate action, and 8 a substantial action that deserves a closer look. The numbers are approximate, not a conversion to hours. Different people may judge the same kind of work differently because their role, context and available input differ.

For example, an engineer estimates 5 Action Points for a User Action to prepare a receiving checklist. The same engineer assigns 3 to a separate Verification Action and 1 to a Lesson Action. Each number belongs to that action and that user's own planning scale; it is not a shared story-point score or a team velocity measure.

Keep effort separate from dates and authority

Approximate effort helps the owner discuss commitments and capacity. It does not by itself say when work can start or finish. If the owner sees a conflict, a Leader can arrange support or route a priority decision. The scheduler forecasts dates from durations, dependencies, calendars and progress evidence. An authorized role controls a Target Date change.



Do not turn the estimate into a score

Do not compare one person's points with another's or rank employees by them. Adding completed points also does not measure program progress. A person can use past estimates to improve their next estimate. To understand a capacity problem, a leader considers actual availability, open work and dependencies as well as permitted workload signals. Personal Action Points are not a performance rating.

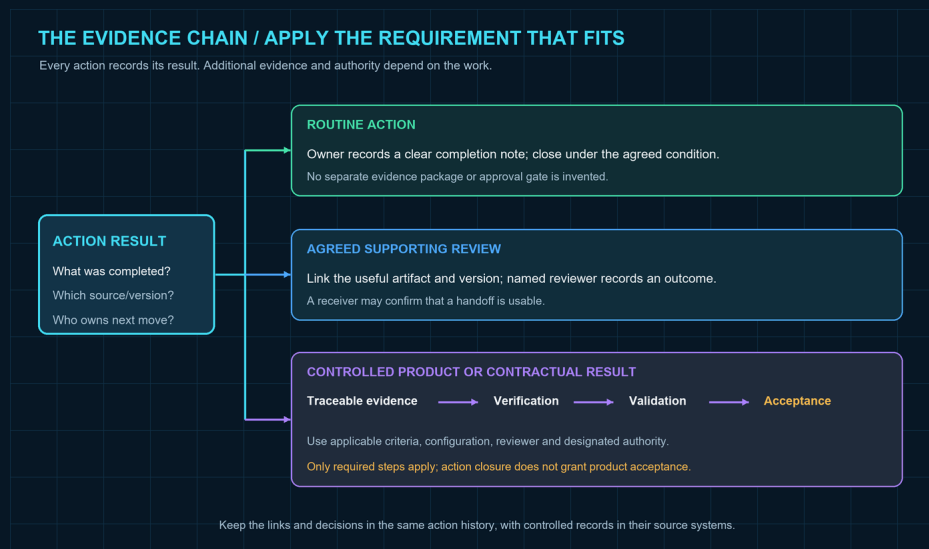
Use the schedule for delivery prediction

Delivery forecasting needs duration assumptions, predecessor logic, resource calendars, reviewer availability and progress evidence. Keep Finish Date, Target Date, approved baseline and integrated forecast meanings distinct. Action Points remain approximate personal effort estimates for the individual actions.



20 Close work and agree review

State the result and completion condition at the start. When the work is done, record the result and carry out the required checks.



Agree what done means

When creating an Action, state the expected result and how completion will be checked. A routine job may need only a short confirmation. For example, a training Action can close when the training system shows it as completed. If the work needs more checking, name the required document and reviewer at the start. Update these conditions when the scope changes.

Record the result and link the document

The owner records what was done and when it was completed. If the work concerns a document or product version, link it. For a drawing review, for example, record the drawing number, version and review outcome. Keep the original document in its source system and link to it from the shared agenda.

Close the Action when its stated result is complete. If something is missing, describe it. If correction requires a separate job, create a linked Action with a named owner. Keep the original result and review notes.

Distinguish completed work from product acceptance

Closing an Action means its stated job is done. Using or releasing a product may require further checks or approval. The technical, quality, safety or contractual process determines which steps apply.

Verification asks whether the specified requirements have been met, using a test, analysis or review. Validation asks whether the product meets the need in its intended use. Acceptance is the customer or designated authority agreeing to accept the deliverable. Obtain separate release permission when required. Record each applicable check and approval. Combine steps only when the governing process allows it.

Link the required checks

An authorized reader should be able to see what was needed, who did the work, which version was used and who checked the result. A simple job may need only a completion note. A safety-critical change also needs links to its required tests, reviews and approvals. A Leader or Manager cannot bypass a required approval by closing the Action.



The receiver checks the handoff

When one team gives an input or result to another, the receiver checks that it is usable. Record any missing version, quantity or information on the Action. A short acknowledgment is enough when the input is suitable. Use a formal review only when the work requires it.

Aster Aviation example

A procurement employee closes a training Action when the training system confirms completion. A supplier follow-up Action closes when the supplier acknowledgment is recorded. The integration team receiving the connector checks its version and interface condition. The drawing calculation separately receives its technical review. Apply the checks each job needs. The owner records the result, closure date and any next move.

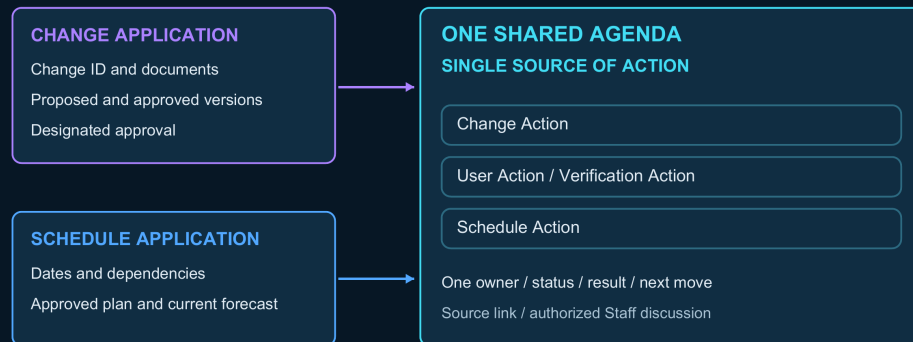


21 Track change Actions in one shared agenda

Manage changes in their own applications. Track the Actions arising from those changes in one shared agenda: the Single Source of Action.

DIFFERENT APPLICATIONS / ONE SHARED AGENDA

Source records stay in their applications; related Actions enter one Single Source of Action.



Manage the change in its source application; track all related Actions in the shared agenda.

Manage the change in its source application

Manage drawing, requirement and product changes in the organization's change application. Keep the change ID, documents, versions and formal approvals there. Manage schedules in the planning application. The shared agenda brings together the Actions associated with work in these applications.

Bring all related Actions into one agenda

A change can create analysis, review, drawing update, test or schedule update work. The Actions for this work must appear in the Single Source of Action. Everyone can then track their permitted work through the same agenda. Each Action has one owner, an expected result, a status and a next move. Include the change ID and a link to its source record. When applications are connected, keep the same job's owner, status and result consistent.

Discuss the needed support in Staff

When priority, capacity or cross-team support is needed, an authorized person can bring the same Action into the relevant Staff area. Use Highlight when appropriate. Add discussion and decisions to the Action. Manager Staff may arrange a reviewer, for example. The designated authority approves the drawing change in the change application. Link that decision to the Action.

Apply the approved change to the affected work

Do not use a proposed revision as the approved version before it is approved and released. After approval, tell the affected Action owners which version to use. They update their work and Finish Date forecasts as needed, perform the required checks and record the results. Obtain the relevant authorized decision if a Target Date or approved plan must also change.

Track the source approval and completion of the related Actions together. Each Action keeps its own owner and result. Apply the access permissions for records and documents. Close the Change Action when its own agreed completion condition is met.



Aster Aviation example

Power Intersection Zone finds an assembly problem in drawing revision D. The engineer opens a record for proposed revision E in the change application. The resulting review, drawing and test Actions appear in the shared agenda and link to the change record. Manager Staff arranges a suitable reviewer. The drawing authority approves E in the source application. The affected owners use the new revision and record their results on their Actions. Change work across different applications is therefore tracked through one Single Source of Action.



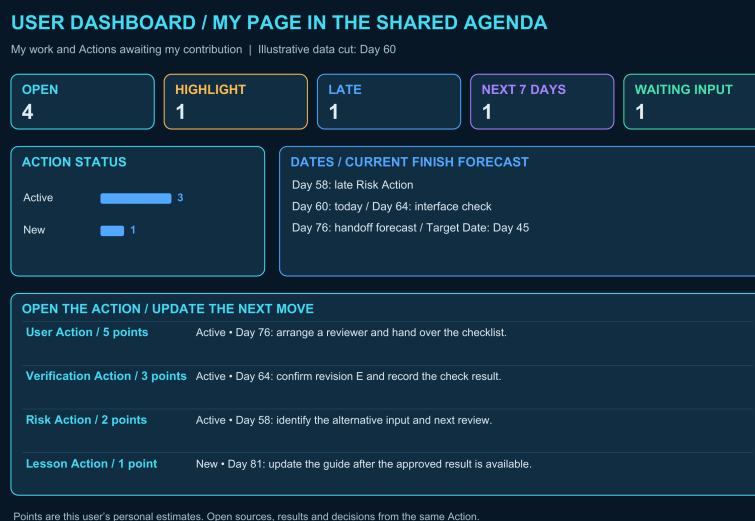
22 Dashboards in the shared agenda

Dashboards are your pages in the shared agenda. The User Dashboard shows your own work; management dashboards show team and management work within your authorized scope.

One agenda, different pages

All dashboards connect to the same shared agenda. The same Action appears on the relevant people's pages without being copied. Users follow their own work. Team Leaders, Managers and other leaders also see work in the areas they manage. Everyone opens only the records they are permitted to access. Opening an Action gives access to its details, discussion and permitted source links.

User Dashboard



The User Dashboard is your own page in the shared agenda. It shows work assigned to you, Actions waiting for your information or contribution, Highlight items and approaching handoffs. Open an Action to update its next move, result or finish forecast. Relevant schedule and document links are on the same record. Your self-entered Action Points remain in your personal planning view.



Team Leader dashboard

TEAM LEADER / TEAM WORK

Authorized domain and Manager Staff scope | Illustrative data cut: Day 60



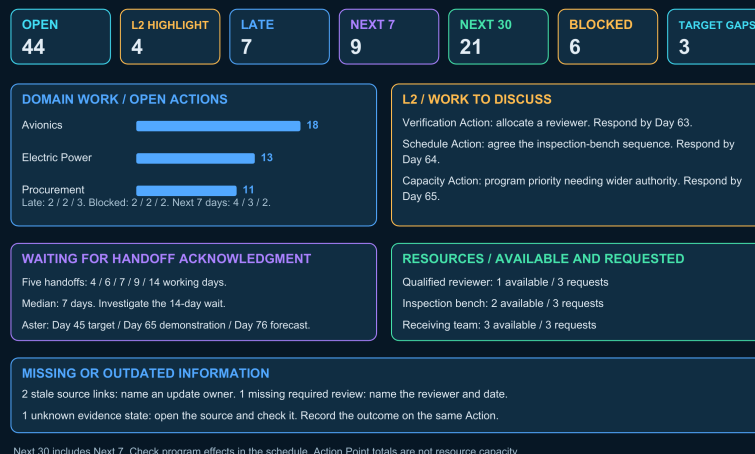
Team Leaders see their authorized domain work and Manager Staff records they are allowed to open. L1 Highlight items, late work, approaching finishes and missing inputs are shown separately. If an Action from the team has moved to a higher Highlight level, its current level remains visible. The leader can resolve a local issue or bring the same Action into an authorized Manager Staff area. Staff meetings cover all Highlight items and other Actions the leader considers necessary.

An Action Points chart may count work in estimate bands without ranking people. Consider actual availability and dependencies when discussing capacity. At Aster Aviation, the leader may find a reviewer within the team. If two teams need the same reviewer, discuss the conflict in Manager Staff and record the outcome on the same Action.

Manager dashboard

MANAGER / MANAGER STAFF DASHBOARD

42 domain Actions + 2 private Manager Staff Actions | Illustrative data cut: Day 60



Managers follow their teams' work on this page. It shows late work, approaching handoffs, blockers and L2 Highlight items. Managed-domain work and private Manager Staff work appear separately. Manager Staff is the area where the Manager and reporting Team Leaders work together.



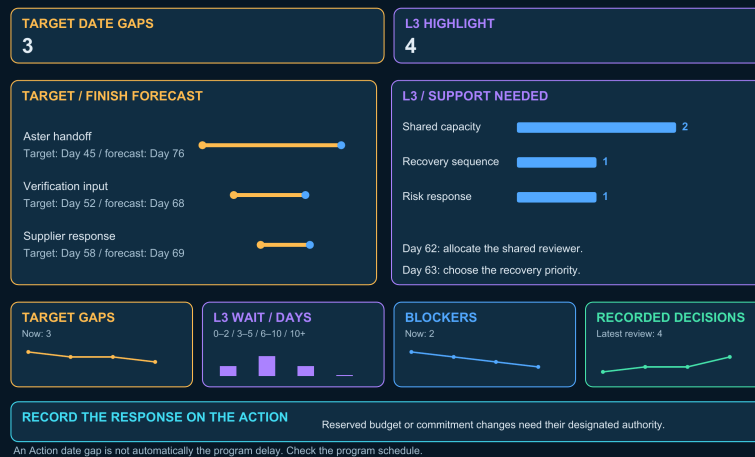
The dashboard helps the Manager see which job needs support. If two teams need the same reviewer, the Manager checks actual availability and decides which job goes first. Assign an owner to resolve a missing review or outdated information. Action Points do not replace the actual capacity of specialists or facilities.

The Manager makes decisions within their authority and records them on the same Action. Work needing higher authority can be discussed in the relevant Staff area. Technical or financial approval comes from the designated authority. At Aster Aviation, the target is Day 45 and the current handoff forecast is Day 76. The Manager sees the gap on the dashboard; the program schedule is used to check the effect on the Day 65 demonstration.

Director dashboard

DIRECTOR / DIRECTOR STAFF DASHBOARD

Authorized domains and L3 Highlight scope | Illustrative data cut: Day 60

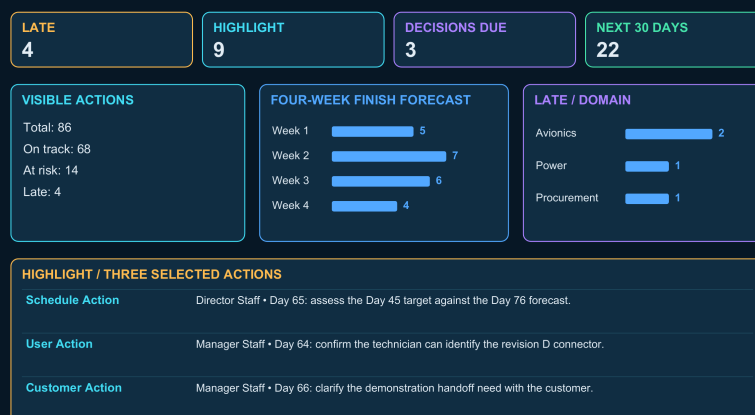


Directors see authorized domains, Director Staff work and L3 Highlight items. Priorities across departments, shared resources and date gaps are prominent. The Director resolves matters within their authority. If higher authority is needed, record the options and effects on the same Action; an authorized person can place it in the appropriate area. Changes to an approved plan or budget require the relevant authorized decision.

Executive dashboards

EXECUTIVE / ONLINE CONTROL ROOM

L4 or L5 selection / authorized portfolio or enterprise scope | Illustrative data cut: Day 60



Three of nine Highlights shown. L4/L5 filters select work needing this authority. Open only permitted source records.



Deputy General Managers or C-level executives can select L4 scope; General Managers or CEOs can select L5. The dashboard summarizes the programs and organizational outcomes within their authority, including commitments, trends and matters needing their decision. An authorized user opens the summary or linked Action. The response is recorded on that Action for its owner to see.

Use indicators to choose the next move

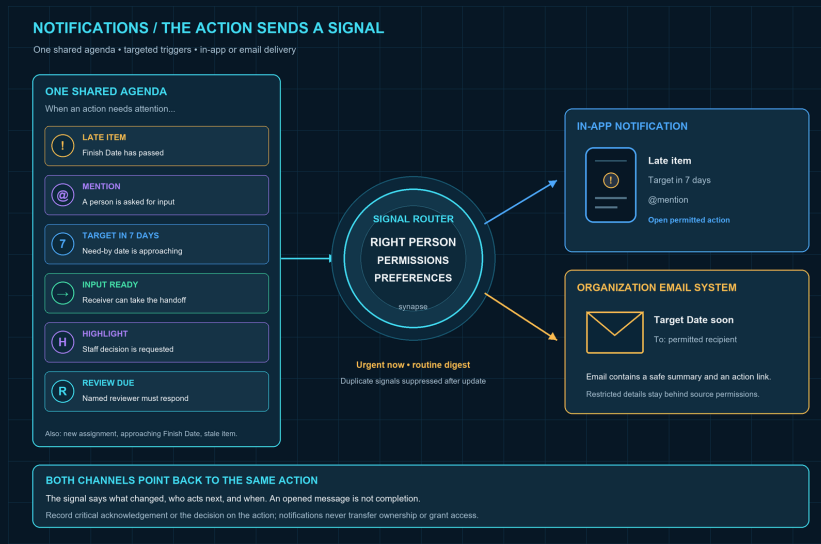
Show Highlight, lateness and forecast-to-target gaps separately. An Action may be late without Highlight, and a highlighted job may not be late. Show missing dates, blockers and outdated information clearly. State active filters, time conventions and the latest update. Count an Action once even when it appears on several pages, using its primary domain for domain totals.

Five handoffs waiting 4, 6, 7, 9 and 14 working days have a median wait of 7 days. This prompts a closer look at the 14-day wait; it does not explain the cause. Action counts do not show program percentage complete. The fictional dashboards show a Day 60 data cut. Selected rows are examples, not complete record lists.



23 Notifications and action pipelines

A notification tells the right person which Action needs attention. The person opens the link and continues work on the same record.



A signal for the right person

Notify the owner of a new assignment, the receiver of a ready input, and a named user when their contribution is needed. Highlight alerts the relevant authorized level. Deliver the notification in the application and, where configured, by email. Link to the same permitted Action or an approved summary.

Define the pipeline rules

A pipeline defines which event sends a notification or reminder to which person. Events may include an assignment, @mention, ready input, approaching Target Date, late work or pending review. Send urgent signals immediately and combine routine updates into a digest. Avoid unnecessary repeat notifications.

Record the response on the Action

Opening an email does not acknowledge a handoff or complete work. Record the acknowledgment, response or decision on the Action. Notifications do not change the owner, status or access permissions.

Remind when a response is overdue

For each Highlight level, define the expected response time, backup recipient and next authorized level. Send a reminder when the window expires. If the issue remains unresolved, an authorized person may change the same Action's Highlight level and bring it into the relevant Staff area. Automate this only under an explicitly authorized rule. Preserve the time and history on the original record. A recipient sees only permitted information; use a safe summary and source link for restricted work. Discussion and decisions are recorded on the Action for the owner to see.



Aster Aviation example

The engineer Highlights the Day 45 target versus Day 76 forecast on User Action-2635. The Team Leader receives an in-app notification and, where configured, an email link. A reminder follows if the response window expires. When needed, an authorized person brings the same Action into Manager Staff. The Manager and Team Leaders discuss the reviewer need and record their decision. The engineer sees it on the User Dashboard and updates the forecast with the new information.



PART 03

Practice Tools

Reusable records for meetings, intersections and actions

ONE CONNECTED SYSTEM

One shared agenda

Clear ownership and access

Useful evidence and returned decisions

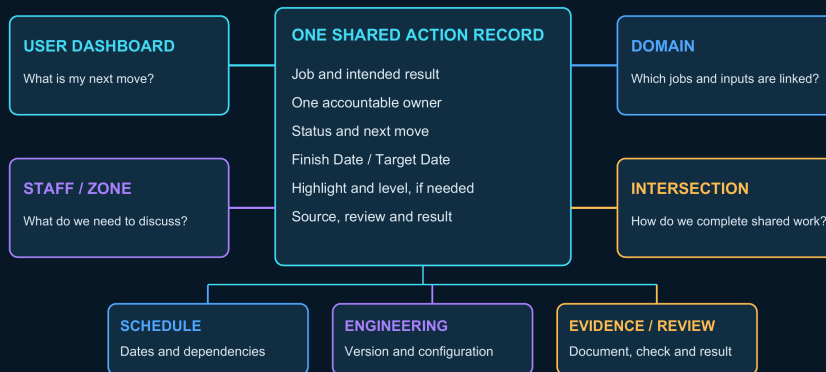


24 Shared Staff agenda

Track each Action once. Users open the same record from their authorized personal, domain, Staff or Zone pages.

ONE ACTION RECORD, MULTIPLE AUTHORIZED PAGES

Update the record once; authorized people see the same current information on their pages.



Documents stay in their source systems. The agenda links to the relevant records.

Agenda record

ID and primary dimension _____

Single action type and verb-first job _____

Intended result and outcome or work-package link _____

Assigned to (one accountable owner) and optional participant identities

Access scope and permitted Staff or intersection set _____

Work state and pause or blocker reason _____

Highlight flag destination level and decision requested _____

Finish Date Target Date gap and response _____

Dependency source link freshness and next review _____

Type-specific source reference (such as a Change Notice number)

Supporting evidence required reviewer and completion condition

Result closure date and applicable review disposition _____



Aster example

User Action-2635 / User Action: prepare the usable connector handoff. Owner: Avionics integration engineer. Contributor: Procurement lead. Receiver: integration lab lead. Scope: authorized Avionics and Power Intersection Zone participants. Work state: Active. Highlight: Yes, initially L1 Team Leader, advanced only when the next authority is needed. Finish Date: Day 76. Target Date: Day 45. Gap: 31 calendar days. Next move: assess recovery and reviewer availability. Review: next relevant Staff meeting.

The Day 55 receipt is a linked supplier input, not User Action-2635's Finish Date. The receiver's usable-input check is the agreed completion condition. Additional controlled evidence follows its designated process. Close the action when its own result is complete and preserve its Highlight and decision history.

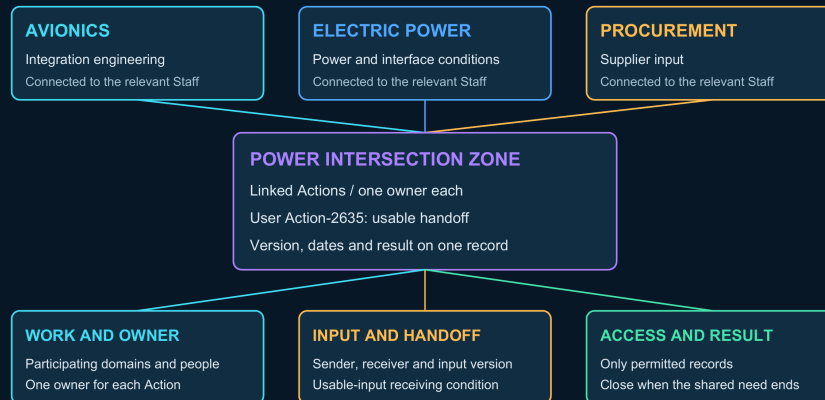


25 Domain map and intersection zones

A simple map shows where domains meet; the shared actions show what moves across them.

MAP THE DOMAINS, LINK THE SHARED WORK

Aster Aviation: three domains work together on the connector handoff.



Each domain keeps its authority. Track shared work through one shared agenda.

Map the existing sets

Draw the stable domain sets and the Staff sets that help each domain coordinate its own work. Label the domain expertise and the people or role accountable for it. This map describes existing connections; it does not create a new approval layer or require a separate agreement.

See work at the contact point

When two or more domains need a shared input, handoff or result, show an Intersection Zone for that work. Use the permitted shared-agenda view to open the linked Actions. Each Action keeps its owner, participants, input version, receiving condition, dates, next review and discussion. A coordinator may help follow several Actions while their owners remain accountable. Directorate-wide work can use Director Zone, broader executive work can use C-level Zone, and work open to all users can use Agile Zone.

Keep the overlap temporary

Only authorized participants see the shared actions and their permitted source records. The participating domains keep their technical or commercial authority; a private Staff action stays private. As the shared need changes, the visible overlap can move, expand or end. There is no separate zone document to maintain.

Aster example

The Power Intersection Zone connects Avionics, Electric Power and Procurement while they resolve the connector configuration and handoff. The integration engineer owns the handoff action, Procurement supplies its input, and the integration lab checks the usable result. Each domain retains its own authority. When the shared handoff is resolved, the active zone ends.



26 Action card

One accountable owner produces a clear result with the agreed review treatment.

ACTION CARD / ONE JOB, THE INFORMATION IT NEEDS

One owner, a clear result and a visible next move.



Update the card once. Authorized people see the same current record on their pages.

Fill the fields the job needs. Supporting evidence, special approval and Highlight are optional unless the work or governing process requires them.

Action card

ID primary dimension and single action type _____

Readable job intended result and usable input _____

Assigned to (one accountable owner) and optional participant identities _____

Access scope and permitted domain Staff or intersection set _____

Work state, blocker, next move and optional Highlight level _____

Relevant dates: Finish Date, Target Date, gap, target-change reason and next review _____

Dependency input version and controlled source reference (CN if applicable) _____

Review and evidence, if required: reviewer, result source and outcome _____

Linked risk lesson follow-up or controlled change _____

Aster example

Verification Action-2636 / Verification Action: check the power-interface input against drawing revision E and the agreed limit. Owner: interface engineer. State: Active. Result: calculation and any discrepancy record linked to source revision E. The designated technical reviewer records the required review. A resource decision, if needed, is highlighted to the next authorized Staff level.

Thank you

Thank you for reading and using STAFF Agile. Start with one shared agenda, make the next move visible, and improve the practice with your organization. For the framework and future editions, visit STAFFAgile.org.



Glossary

Action

A work record with one accountable owner, a stated result and a visible next move.

Single Source of Action

One shared agenda holds the Actions. Authorized personal, domain, Staff and Zone pages open the same records.

User Dashboard

Your own page in the shared agenda, showing your work, contribution needs and relevant notifications.

Assigned to

The field naming the Action's single accountable owner.

Domain

An established specialist area with its own work, team and authority.

Manager Staff

The Manager and reporting Team Leaders working together within their authorized scope.

Director Staff

The authorized management area for work needing the Director and reporting Managers.

Intersection Zone

An area for real shared work across domains. Each linked Action keeps its owner and permissions.

Agile Zone

An area accessible to every user for broadly visible shared work.

Director Zone / C-level Zone

Areas for shared work across a directorate or the relevant broader executive scope.

Highlight

The separate field showing the level where an Action needs attention or support. It is not a work status.

Action status

New: captured but not started. Active: work is progressing. Closed: the stated result is complete and recorded.

Freeze

A temporary pause with a reason, responsible person and next review date.

Finish Date

The owner's current completion forecast based on the known scope, inputs, capacity and dependencies.

Target Date

The authorized need-by date. Keep the old date, new date and reason when it changes.



Approved plan / current forecast

The approved plan is the reference commitment. The current forecast shows the expected result and dates using today's information.

Action Points

The assigned person's approximate effort estimate for their own Action, used for personal planning.

Story Points

Relative estimates commonly agreed within a team. Totals from different teams do not reliably show organization-wide capacity.

Pipeline

Rules defining which Action event triggers a notification or reminder, for whom, and when.

Change Action

Tracks work arising from a change and links it to the designated change record in its source application.

Change Notice (CN)

A reference to the original controlled change record.

Verification

A test, analysis or review checking whether the stated requirements were met.

Validation

A check that the result meets the need in its intended use and context.

Acceptance

The designated customer or authority accepting the deliverable against agreed criteria.

Source record

The authoritative drawing, schedule, test, approval or other record in its governing system. The agenda links to it.

Strategy / Timeline

Executive principles: define the goal and mandate; establish a credible delivery commitment.

Alignment / Foundation

Executive principles: coordinate teams and shared resources; keep scope, records and controls trustworthy.

Fulfillment

The executive responsibility for an accepted, usable result and the required delivery and closure conditions.