TRYGG FACILITATOR KIT

Document Marking

Everything needed to run a small-group roundtable from your document marking policy. The group decides when a file needs a visible mark, when the folder is the label, and what to do before a labelling product arrives. Includes a facilitator plan, agenda, discussion prompts, a four-stage tabletop, and a one-page handout.

Agenda

Time	Block	What happens
0:00 to 0:10	Welcome and hook	The person who owns the document marking policy opens. The facilitator tells one story about a leadership pack emailed with customer names and no mark. Ground rules.
0:10 to 0:25	Story round	Each person shares a file they sent, printed, or dropped in the wrong folder. Capture themes on a flip chart.
0:25 to 0:50	Guided discussion	Work through 3 or 4 topics chosen from what the story round brought up.
0:50 to 1:10	Tabletop scenario	Groups of 3 or 4 work through The unmarked pack, one stage at a time, then report back.
1:10 to 1:20	Gap check	Sticky notes: one document we could not label today. Group them and rank them.
1:20 to 1:30	Commitments and close	Hand out the desk card. Each person names one document they will mark this week and takes the card with them. If the policy is not written down, the close is the three labels.

The unmarked pack

Give each group one stage at a time, about 5 minutes apart. Groups answer each stage's question before seeing the next.

TUESDAY, 8 A.M.
A leader emails a management pack to a board member. The pack includes customer names. Nothing on the file or the email says how to handle it.

What does your document marking policy require before that email goes?

TUESDAY, 9 A.M.
Someone prints the pack for the meeting. The pages have no header and no footer.

What mark belongs on the printed copy, and who approves the print?

TUESDAY, 4 P.M.
The file is saved in a folder that anyone in the organization can open.

Is the folder the label, or does the file still need a move?

WEDNESDAY, 10 A.M.
A supplier is copied on the thread so they can help with the numbers. They can open the pack.

What has to be true before a supplier receives it?

Debrief, after the groups report

- Customer names are Restricted. The email needs a visible mark, and encryption, before it goes to the board member.
- A printed Restricted pack is marked on every page. The person who owns the information approves the print.
- A folder anyone can open is the wrong label. Move the file to a folder that matches Restricted.
- A supplier is a handoff. The mark travels with the file, and only the people who need it receive it.

2 weeks before

- Confirm the date, the room, and who is coming with the person who owns the document marking policy
- Ask each person to bring one real document they sent, printed, or stored this month
- Send the invite with the ask to bring one story

Day of

- Print the desk card, one for each person, plus the scenario cards (one stage per card) and sticky notes
- Set up a flip chart with four columns: Policy, Leaves, Folder, No tool
- Assign a note-taker

Within 1 week after

- Send a thank-you with the desk card and the top 3 gaps raised
- Give the policy owner the documents the group could not label, and the label each one needs
- Log who came
- If the three labels are not written down, schedule the hour to write them