Story vs Reality Review

Facilitation guide · team, one facilitator

What this is: a facilitated activity you run on a finished piece of work to separate the story the team has agreed on (the part everyone says out loud) from the real drivers (true, but unsaid). Each person privately writes what drove the outcome and places each driver above or below a waterline; the below-the-line cards, revealed together, are the honest review the team could never reach by open discussion. It takes about 30–45 minutes and needs a board or wall for the waterline. Your job is to make the private sort safe — and to make the reveal land.

The one line to hold: the learning is below the waterline. A review that only discusses the agreed story teaches nothing — the team already knew that story. Protect the private placement and the reveal; that is where the honesty lives. **The story a team agrees on is comfortable. It's rarely complete.**

· WHEN DO I USE THIS?

Use this when

GOOD FIT

A finished piece of work where the team has agreed on an explanation of what happened — and you suspect the real drivers haven't been said. A review that keeps reaching the same agreed conclusions. The one test: is there a gap between the story the team tells and what people privately believe drove it? If yes, this surfaces it.

WRONG TOOL

A recurring crunch you want to trace to its cause › Crunch Cycle Review. Scope that crept over time › Requirement Drift Simulator. A live setback to recover from now › Delivery Recovery Path. A blameless review that just needs structure, not honesty. If the team has genuinely already said the hard things, you don't need this.

Before you begin — confirm all three are true

- ✓ The work is complete
- ✓ The team already has an agreed explanation of what happened
- ✓ The people in the room were involved in the work

If any answer is "no," postpone the activity — the tool needs a finished piece of work, a settled story, and the people who were there.

The distinction that matters: this tool is about **honesty** — separating the told story from the real drivers of one past outcome. It is not about causation (why a crunch recurs) or accumulation — how many small changes build up. It surfaces what was *known but unsaid*.

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THREE WAYS TO LOOK BACK

STORY vs REALITY (this tool)
honesty — separate the told story from the real drivers of one outcome

CRUNCH CYCLE REVIEW
causation — why the same crunch keeps recurring over time

REQUIREMENT DRIFT SIMULATOR
accumulation — how many small changes piled up until the work was unstable

PART 1 RUNNING THE ACTIVITY

team, one facilitator

1 · WHAT IS THIS REALLY DOING?

The one idea

After the fact, teams settle on a shared story that's comfortable and incomplete — the real drivers feel unsafe to name, so they stay unsaid. Open discussion only ever surfaces the story everyone already agrees on. Writing privately and sorting each driver above or below a waterline lets people put down what they wouldn't say aloud; revealing the below-the-line cards together makes it safe and collective. The honest version was there all along in the room — it just needed a private way onto the board.

THE STORY WE TELL vs WHAT ACTUALLY DROVE IT

ABOVE — THE AGREED STORY

"scope changed" *"we were unlucky"* *"estimate was off"*

THE WATERLINE

BELOW — THE REAL DRIVERS (true, but unsaid)

date was unrealistic at kickoff	no one challenged the sponsor
the early warning was ignored	the risk was flagged and parked
the real decision was never written	we'd rather not raise the conflict

The story above is what the team already knew. The learning is all below — and it only surfaces if the write is private.

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2 · WHAT DO I NEED?

What you'll need

One finished piece of work (core)	A real, recent project or outcome the team has a settled story about. They must recognise the story.
A board or wall for the waterline (core)	A clear horizontal line: above = the told story, below = the real drivers. The physical sort is the mechanism.
Driver cards + pens	Plain write-on cards, one driver each, written privately so the honest ones reach the board. No names — and handwriting is fine, no need to disguise it. The facilitator never identifies or discusses who wrote a card.
One facilitator	Runs the flow, keeps the placement private until the reveal, and makes the below-the-line cards safe to name — never attributing a card to a person.

Resilience · Learn and Improve · 30–45 minutes. Protect the private write and the reveal — they are the tool.

3 · HOW DO I RUN IT?

The run-sheet

Brief the team, then run these in order. The bold part is what you say or do; the move under it is where you add the most. Protect Step 3 (the private write) and Step 4 (the reveal) — they are the tool. If pushed for time, fewer above-water cards and a full below-water reveal beats a balanced board with no honesty.

1. Name the work, draw the waterline	**4 min**	*"Which finished piece of work are we being honest about?"* Put up the board. Above the line: the story we tell. Below: what actually drove it. Name the line out loud.
2. Capture the agreed story (above)	**6 min**	*"First — what's the story we've been telling about how this went?"* Post the agreed answers above the line, fast, no debate. The story isn't wrong, it's just incomplete — naming it openly is what makes the gap visible later.
3. Private write — the real drivers	**8 min**	*"Privately, on your own cards: what do you think actually drove the outcome — including what we haven't said? One idea per card."* Silence. Everyone writes. No names. If people start discussing, stop them — the private write is the whole mechanism.

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4. Place, then reveal	**8 min**	*"Place each card above if it's already part of the story, below if it's true but we haven't said it."* Before reading, place similar cards together so repeated drivers become visible. Then collect the below-the-line cards yourself and read each aloud, neutrally. Let the stack build in silence.
5. Choose the honest driver, carry it forward	**10 min**	*"Of the below-the-line drivers — which one, if we'd faced it, would have changed the outcome most?"* Pick one. Name what to do differently next time, and an owner. Commit one — an action, not a confession.

THE REVEAL IS THE TOOL — READ THE BELOW-THE-LINE CARDS ALOUD, FLAT

The reveal — the moment the below-the-line cards are shown — is the felt moment. Read each card neutrally — without reacting, without attributing. The stack growing (things everyone half-knew but no one had said, and especially several cards saying the same thing) is the honest review arriving; the relief comes from seeing how many people privately knew it. Don't rush it — pause briefly after every three or four cards, without commenting or interpreting, and let the room sit with the stack. Read every card before any discussion begins — the full below-the-line picture must be visible first. **Watch for the insight landing:** the below-the-line stack is bigger than the above-water story; someone says "I didn't know anyone else thought that"; quiet nods, not argument, as a card is read; someone names the thing the room had been carefully not saying. The conversation shifts from "what happened" to "what we didn't say." Let it land before moving on.

PART 2 GETTING IT RIGHT

why it works, redirects & mistakes

4 · WHY DOES THIS WORK?

Why it works

Three design choices make this activity work — hold them, or it becomes an ordinary review. The **private, anonymous write**: people will write a below-water driver they'd never say aloud; open discussion only ever surfaces the above-water story. The **waterline sort**: forcing each driver above or below makes "is this already said, or unsaid?" an explicit choice — placing a card below the line is the team admitting what it knew but didn't voice. The **reveal, read flat**: reading the below-the-line cards aloud, neutrally, without attribution, makes the honesty collective and safe — no one person owns it. Skip the private write or the reveal, and you have a flipchart of the story the team already agreed on.

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ONE THING TO HOLD HONEST

The below-the-line cards are not automatically correct — they are simply what hasn't yet been discussed. Sometimes "scope changed" or "the vendor was slow" really is the main driver. Treat the below-the-line cards as things to look at honestly, not as automatically truer than the story above. Anonymous speculation isn't truth until the team examines it together.

5 · WHAT WILL THE TEAM SAY?

What they say — and your move

These are the lines that keep the room above the waterline. Each has a one-sentence redirect.

What they say	Your response
"We already know what happened."	"That's the story above the line. Privately — what's true that we haven't said?"
"It really was just bad luck."	"Maybe — put it above the line. Now, below it: what did we know and not act on?"
"I don't want to point fingers."	"Nor do I — cards are anonymous, and we're naming drivers, not people."
"This feels uncomfortable."	"That's the below-the-line cards doing their job. The discomfort is the honesty, not a problem."
A card blames a person or group	"Let's restate that as a driver we can act on." "Management ignored us" becomes "early risks weren't escalated effectively" — same point, now actionable.

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6 · WHAT IF IT GOES WRONG?

Common mistakes & edge cases

What happened	The fix
The write became open discussion	Open discussion only surfaces the above-water story. Insist on silence and no names — the private card is how the unsaid gets onto the board.
A card was attributed to a person	Kills the safety that made it sayable. Re-voice it as a driver: “the decision wasn’t challenged,” not “X didn’t challenge it.”
The reveal was rushed	The stack needs to build in silence to land. Slow down; read each card flat; let the room sit with it.
Nothing went below the waterline	The team is either genuinely open (rare) or doesn’t feel safe. Reassure on anonymity and ask more pointedly: “what did we know and not say?”
Everyone wrote the same driver	A strong result, not a weak one. “The value isn’t that we found many things — it’s that everyone privately knew the same thing, and no one said it.”
It stopped at the honesty	A surfaced driver with no next-time change is just an uncomfortable moment. Convert the most load-bearing one into a concrete action with an owner.
People defended decisions while cards were being read	Finish reading every card first. Discussion begins only after the full below-the-waterline picture is visible — debating card three buries cards four to twenty.
It turned into a blame session	Stop. Reset to drivers, not people; anonymity, not attribution. If it can’t be held, end on the one safe driver.

Before you close the activity

- ✓ The private write filled the below-the-line cards — it didn’t become open discussion
- ✓ The reveal was read flat, neutrally, and landed in silence
- ✓ The team named a driver it had never voiced in an open review
- ✓ You left with one honest change and an owner — not just an uncomfortable moment

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7 · HOW DO I MAKE THIS STICK?

Take it back to work

THE HABIT

In any review, ask:

“What’s the story we’re agreeing on — and what do we each privately think really drove this?”

The second answer is the one worth surfacing. The more a team names what it knew but didn’t say, the less its reviews settle for the comfortable story — and the more each one actually teaches something new.

Appendix · Reference

You should not need this to start. Read it before, or if a run goes sideways.

8 · A WORKED RUN

Watch the facilitator move

The work: “the platform migration that ran three months over.”

Stage	What happened
Agreed story (above)	“Scope grew.” “Vendor was slow.” “We underestimated.” Up they go, fast.
Private write	Silence. Everyone writes their real drivers on plain cards. No names.
The reveal (read flat)	Collect the below-the-line cards; read each neutrally: “we knew the date was unrealistic at kickoff.” “No one wanted to challenge the sponsor.” “The risk was flagged and parked.” Don’t react, don’t attribute. Let the pile build.
Carry one forward	“The biggest one: we knew at kickoff and didn’t say. Next time: a pre-commit challenge before any date is accepted. Owner: Delivery Lead.”

Above the line was the story the team had told for months. Below it was the thing they all knew and never said — the date was wrong from day one. The reveal didn’t blame anyone; it made the unsaid sayable, and turned it into one change.

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· WHERE DOES THIS FIT?

Where this sits in the Gym

The shape of the problem	Use this
The team's agreed story hides what really drove a past outcome	**This tool — Story vs Reality Review.** Honesty about the past. Sort above/below the waterline.
The same crunch keeps recurring — trace why	**Crunch Cycle Review** — causation over time. Tip the first domino.
Many small changes accumulated until the work was unstable	**Requirement Drift Simulator** — scope creep made felt. Pull, don't stack.

The move underneath: when the agreed story is comfortable but incomplete, don't discuss it — sort it. Put the told story above a line, let each person privately place the real drivers below it, and read the below-the-line cards flat. That move — from open discussion to private sort — is what lets a team finally say what it already knew.

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