

USER GUIDE

Integration

Delphi ecosystem — user guides

English

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Integration: Plan → Pronoia → DAE

A panelist experiences one study — its rounds, its feedback, its Home view. **The facilitator runs something larger.** Their process spans three stages — design, collection and analysis — and reaches across two connected ecosystems. Pronoia is the bridge between them.

Upstream sits the **Delphi Planning Ecosystem (DPE)**, where the study is designed. Downstream sits the **Delphi Analysis Ecosystem (DAE)**, where the collected material is interpreted. **Pronoia** is the data-collection layer in the middle: it receives a finished design, runs the study, validates the result, and hands a clean dataset on to analysis.

Why this matters for the facilitator. The quality of the analysis is decided long before analysis begins — in how the study is designed and how cleanly it is collected. Owning the whole arc, and the two handoffs that join it, is the facilitator's core responsibility.

Integration is the top of the capability arc

Assembling a single study by hand is **operating**. When the handoffs carry the design from stage to stage without rebuilding, the whole chain becomes a **system** — infrastructure the work runs on. The through-line of this guide is exactly that shift: you stop re-assembling the study in every tool, and let the handoffs flow.

HANDOFF 1

Design in

The Planning Handoff Package carries orientation, the panel matrix, the theses and the perspective context into Pronoia. You don't rebuild the study — you continue it.

COLLECTION

Pronoia runs

Round 0, the round phases, anonymity, pulse and metrics. The facilitator is active: collection is not a passive wait but spurring the panel into movement.

HANDOFF 2

Data out

The export contract hands the validated dataset to DAE. A malformed dataset cannot silently enter analysis — the gate stops it.

Stage 1 — Design (DPE)

Before Pronoia collects anything, the facilitator designs the study in the Planning ecosystem. Each step is a deliberate methodological choice that shapes everything downstream.

Planning step	What the facilitator decides	What it produces
Orientation	The study's logic (N / S / R / E / D / D+)	Expert vs observer panel; dialectical vs abductive theses
Pre-analysis	Futures Wheel (impacts), Relevance Tree (goals-means)	A scoped, structured view of the phenomenon
Phenomenon	What is actually being studied	The boundary of the inquiry
Panel design	The matrix, the perspective layer, the health score (PHS)	A designed epistemic space
Question architecture	The theses and their structure	The collection instrument
Simulation (optional)	Synthetic argumentation when no real panel exists	A test / seed argument set
Learning loop	Lessons carried from earlier studies	Better, evidence-based design choices

Planning ends at a quality gate: only a coherent design — orientation, phenomenon, panel and theses aligned — is packaged for collection.

Handoff in — the Planning Handoff Package

The design crosses into Pronoia as a structured **Planning Handoff Package**: the orientation, the panel matrix and its type, the theses, and the perspective/PHS context. This seeds Round 0 — so the facilitator does not rebuild the study in Pronoia, but continues it.

Stage 2 — Collection (Pronoia)

This is the facilitator's operational core. In brief, the facilitator opens **Round 0** as an AI-assisted intake (motivating participants and mapping the phenomenon, optionally with key informants), then runs each round through its phases — response → dialogue → revision → close — setting the iteration

stance with policy presets (classic / RTD / open, with Barometer arriving), protecting anonymity and identity, and reading the panel through the pulse, the group comparison and the process metrics.

What distinguishes the facilitator is an **active role**: collection is not a passive wait for answers but a continuous effort to spur the panel along — and the levers work at three levels.

Level	How the facilitator spurs movement	Effect
The whole panel	Pace the phase advance; open the result graph and pulse at the right moment; broadcast reminders and messages; choose the visibility stance; supplement the panel between rounds	Sustains momentum and collective movement
Groups	Surface the group comparison across the matrix axes; highlight that one group has moved while another has not; add perspective theses where a viewpoint is thin; recruit roles to cover blind spots	Drives differential movement and cross-position dialogue
Individuals	The live Home view with its "since your last visit" digest; direct nudges and personal messages; recognition of contributions; per-panelist reminders	Pulls each panelist back to revise and learn

Spurring is targeted, not generic. The most effective prompt is specific: show one group the gap between its position and another's, or show an individual how far the panel has moved since they last looked. Real-time data is what makes that precision possible.

The validation gate — earning the handoff

Collection does not flow into analysis automatically. Before any handoff, Pronoia validates the result, and a failing check blocks the export until it is fixed:

- **Panel-composition gates** — the orientation-specific minimums (matrix size, stakeholder groups or observation distances, domains or outside roles, decision-maker rules).
- **Epistemic coverage** — the argument space read as a coverage map; thin coverage is a prompt to supplement the panel before closing.

This gate is the facilitator's quality promise to the analysis stage: what crosses over is complete and well-formed, not raw.

Handoff out — the export contract

On a clean validation, Pronoia emits a structured payload for the DAE ecosystem. At the facilitator's level it carries:

- the **orientation** and **panel matrix type**;
- the **argument space** — theses × panel members and their arguments;
- the **epistemic coverage** — how much of the argument map is filled;
- the **perspective summary** — health score, dominant perspectives and named blind spots;
- the **validation status** — confirming the dataset passed its gates.

Downstream consumers verify this contract before they begin, so a malformed dataset cannot silently enter analysis.

Stage 3 — Analysis (DAE)

In the DAE ecosystem the collected material is interpreted through a gated pipeline. The facilitator **commissions and oversees** it rather than running every method by hand.

Foundation → Content → System → Futures → Synthesis → Report

DAE phase	What it does
Foundation	Validates the panel and builds the quantitative base
Content	Analyses arguments, dialogue and discourse, including the epistemic coding
System	Reads depth, dynamics and purpose (causal layers, transitions, soft systems)
Futures	Surfaces weak signals and maps structural tensions
Synthesis	Integrates every lens into a grand synthesis, with perspective depth
Report	Builds scenarios and audience-specific stakeholder reports

Quality gates and human judgement sit throughout: where automated confidence is not enough, the analyst is brought into the loop — and the facilitator decides how far interpretation should reach.

Closing the loop — learning across studies

The arc is not a straight line but a cycle. Both ecosystems keep a memory: the planning side records each design and its lessons, the analysis side keeps a case library of completed runs. The facilitator feeds these lessons back into the next study's design — so each Delphi run makes the next one better.

The facilitator's through-line. Design well, collect cleanly, analyse rigorously, and learn from the result. Pronoia is where that arc is held together — the point where a designed study becomes trustworthy data, ready for interpretation.

The facilitator's end-to-end playbook

1. **Design with the end in mind.** Choose orientation, scope the phenomenon (pre-analysis), design the panel and write the theses — knowing they define the whole argument space.
2. **Cross the first handoff intact.** Carry the Planning Handoff Package into Pronoia and continue the study rather than rebuilding it.
3. **Run collection deliberately.** Open the intake, set the iteration stance, advance the phases, protect anonymity, and watch the pulse and metrics.
4. **Earn the second handoff.** Clear the validation gate — panel composition and epistemic coverage — before closing; supplement a thin panel if needed.
5. **Commission analysis.** Export the validated dataset, oversee the DAE pipeline, and decide how far interpretation and reporting should go.
6. **Close the loop.** Capture the lessons and carry them into the next study's design.

Source: Pronoia — The Facilitator's Process (Metodix, June 2026). This block reframes the same arc along the capability arc.