



WORKSHEET 01 / 04

Map the first useful result.

Choose one customer journey. Record what you know, mark what is uncertain, and keep customer details anonymous.

PRODUCT / JOURNEY

OWNER

REVIEW DATE

THE CUSTOMER IS TRYING TO...

THE PROMISE THAT BROUGHT THEM HERE...

THE FIRST USEFUL RESULT IS...

Describe an observable customer accomplishment, not just a signup or a sent email.

Journey stage	What they see / do	Evidence we have	Possible obstacle
Arrives			
Signs up			
Starts first task			
Gets useful value			
Returns / next step			

WHAT WE OBSERVED DIRECTLY

WHAT WE ARE ASSUMING

THE ONE PLACE WE WILL INVESTIGATE FIRST



WORKSHEET 02 / 04

Make the next message useful.

Write one lifecycle message that helps someone finish a real task. Define the event, destination and stop rule before drafting.

ELIGIBLE CUSTOMER / STAGE

ENTRY TRIGGER + SOURCE EVENT

WHAT THEY HAVE NOT COMPLETED

THE USEFUL HELP WE WILL PROVIDE

ONE ACTION + EXACT DESTINATION

WHEN THIS MESSAGE IS APPROPRIATE

STOP / EXIT CONDITION

Completion, opt-out and other exclusions.

FREQUENCY LIMIT / SUPPRESSION

TEST CONTACT + EXPECTED BEHAVIOR

WHO CHECKS THE EVENT AND DESTINATION

WORKING SUBJECT LINE

MESSAGE BODY

CALL TO ACTION



WORKSHEET 03 / 04

Turn one finding into a test.

Choose a small change you can verify. Agree on the evidence, observation period and decision rule before implementation.

OBSERVED PROBLEM + EVIDENCE SOURCE

Include the period reviewed; use "not measured" when evidence is absent.

HYPOTHESIS: IF WE..., THEN...

State the behavior you expect to change and why.

ONE CHANGE + OWNER / DEPENDENCIES**PRIMARY METRIC**

Eligible people completing [useful action] within [window] / eligible entrants in [defined cohort].

ELIGIBLE COHORT + EXCLUSIONS**BASELINE COUNT / DENOMINATOR / PERIOD****PRIMARY EVENT + OBSERVATION WINDOW****COMPARISON DESIGN**

Controlled experiment or descriptive before/after review?

GUARDRAILS

Errors, complaints, support burden, opt-outs.

TIME / COST LIMIT**DECISION RULE AGREED BEFORE THE TEST****ROLLBACK PLAN**



WORKSHEET 04 / 04

Record what actually happened.

Separate measured work from public case analysis and illustrative examples. A before/after change alone does not prove causality.

EVIDENCE LABEL

Measured work / public case / illustrative example.

CHANGE DATE + OBSERVATION PERIOD**BEFORE: NUMERATOR / DENOMINATOR / RATE****AFTER: NUMERATOR / DENOMINATOR / RATE****ABSOLUTE RATE DIFFERENCE**

Percentage points.

RELATIVE CHANGE

Calculate only when baseline is nonzero.

Example only: 20/100 to 30/100 is 20% to 30%: +10 percentage points, +50% relative. These are not client results.

WHAT ELSE CHANGED?

Traffic source, audience, product, offer or timing.

SAMPLE / MEASUREMENT LIMITATIONS**DELIVERY + ACQUISITION COSTS****GUARDRAIL RESULTS****WHAT WE CAN CONCLUDE****WHAT REMAINS UNKNOWN****KEEP / REVISE / STOP: WHY? + NEXT OWNER****PERMISSION TO SHARE**

Confirm claims, anonymization and client approval.