PRACTICAL RESOURCE / OUTCOME DRIVEN

The first customer win

Outcome Driven · The Customer-Win Recipe

Illustrative planning template, not measured performance or a guaranteed result.

1. Choose the result

A new user can complete one meaningful task.

Our definition: _____

Customer segment: _____

Evidence we have: _____

2. Set entry and timing

Entry: An eligible person has signed up but has not completed the task, with permission to receive the message.

Timing: Check actual product state; do not send because a calendar interval alone has passed.

Our entry event: _____

Eligibility and permissions: _____

Channel, owner and timing: _____

3. Make the experience ready

Test the real destination using an eligible test account. Check prerequisites, access, mobile use and support. Do not use copy to disguise a broken product state.

4. Draft one helpful message

Subject / opening: Here’s the next step to [customer result].

You joined to [goal]. Start with [one task]. You will need [prerequisite]. Go directly to [verified destination]. Need help? [approved support path].

All bracketed placeholders must be verified or replaced; do not invent a past action.

5. Stop when it stops being helpful

Task completed; opted out; already received the same help; account is inaccessible; unresolved issue needs support.

Our exit, suppression, frequency and retry rules: _____

---

6. Observe and decide

Task completion count / eligible entrants over a defined window. Also record errors, opt-outs and support contacts.

Baseline and observation window: _____

Success definition and guardrails: _____

Time / cost limit: _____

Keep / revise / stop criteria: _____

Review date and owner: _____

Rollback plan: _____

Before launching

Verify consent or other applicable permission and requirements with your approved team. Test entry, exit, completed-task, no-access, duplicate, reply, opt-out and failed-delivery paths. This template is not a legal determination.

Need hands-on help?

Growth Fix is the existing Waymaker Agency service for one agreed feasible improvement. A whole lifecycle rebuild is separate. Confirm fit, access, scope, timing, and price before purchase.