

LISTEN. THEN PUT IT TO WORK.

Audiobook companion

The tables, diagram, templates, and reference notes from the book, organized for use with the audiobook.

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Use the table number spoken in the recording to find the corresponding page. Chapter sections also contain the blank statements and complete message templates described aloud.

The audiobook companion is included with this edition. The separate Field Kit offers additional reusable resources; you can apply the book without that download.

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Table 1.1. Weak proxies versus better activation signals, by business type.

Business	Weak proxy	Better activation signal
Consulting	Contract signed	Client completes kickoff with priorities and next action agreed
Dental practice	Appointment booked	Patient completes intake and understands the treatment plan
Home services	Invoice paid	Customer receives the promised fix and knows the next maintenance step
Online course	Account created	Learner completes the first outcome-producing exercise
SaaS	User logs in	User completes the core action that produces first value

For example, a signed consulting contract is a weak proxy. Completing a kickoff with priorities and the next action agreed is a better activation signal.

Table 1.2. Cost-of-the-leak worksheet.

Input	How to calculate	Example	Your number
New customers in the period	Count of customers who started during the window	50	
Customer acquisition cost (CAC)	Sales and marketing cost ÷ new customers	\$400	\$
Monthly gross profit per customer	Monthly revenue – direct cost to serve	\$80	\$
CAC payback period	CAC ÷ monthly gross profit per customer	5 months	months
Customers lost before payback	Count who left before the payback month	10	
Gross profit returned per lost customer	Months retained × monthly gross profit	$2 \times \$80 = \$160$	\$
Estimated unrecovered CAC	Customers lost × (CAC – gross profit returned)	$10 \times (\$400 - \$160) = \$2,400$	\$

It combines your acquisition cost, gross profit, payback period, and number of customers lost before payback. In the example, losing ten customers with two hundred forty dollars of unrecovered acquisition cost each leaves two thousand four hundred dollars unrecovered.

Table 2.1. Diagnosing a missing behavior: questions, failure modes, and better responses.

Question	What failure may look like	A better response
Does the customer want the result now?	"I'll do it later."	Reconnect the step to the outcome they chose.
Can the customer do the step easily?	Errors, hesitation, repeated questions	Remove fields, prefill information, or provide guided help.
Is there a clear prompt at the right moment?	The customer simply forgets	Trigger one specific reminder in context.

Ask whether the customer wants the result now, can take the step easily, and receives a clear prompt at the right moment. Reconnect the step to their goal, remove practical barriers, or change the reminder according to what you find.

Table 2.2. Three dimensions of trustworthiness and how onboarding proves each.

Dimension	What the customer is asking	What onboarding can prove
Ability	"Can you do what you promised?"	Deliver a small, relevant result; give accurate guidance.
Benevolence	"Do you care what happens to me?"	Personalize help; notice hesitation; avoid unnecessary work.
Integrity	"Will you do what you said?"	Keep promises; explain tradeoffs; communicate delays early.

Ability shows up in accurate guidance and a useful result. Benevolence shows up when you notice hesitation and avoid unnecessary work. Integrity shows up when you keep promises and explain delays.

Table 3.1. Three psychological needs and the onboarding response to each.

Need	Customer's question	Onboarding response
Autonomy	"Do I have a meaningful say in this?"	Offer a small number of relevant paths and explain tradeoffs.
Competence	"Can I succeed here?"	Create achievable early wins and clear feedback.
Relatedness	"Am I understood and supported?"	Connect the experience to a real person, peer, or community.

For autonomy, offer relevant choices and explain the tradeoffs. For competence, create achievable wins and clear feedback. For relatedness, connect the customer to a person or group that understands their situation.

Table 3.2. Motivation audit scoring rubric (0–2 per dimension).

Dimension	0	1	2
Autonomy	No meaningful choice	Choice without guidance	Relevant choice with a recommendation
Competence	No clear win	Task completed, result unclear	Useful result with specific feedback
Relatedness	Customer is alone	Generic support is available	A relevant person or group is visible
Focus	Several competing actions	Primary action is present but cluttered	One unmistakable next action
Progress	Administrative completion only	Progress is visible	Progress maps to a customer goal
Continuity	Sequence ends abruptly	Next step is mentioned	Onboarding hands off to a valued operating goal

The rubric covers autonomy, competence, relatedness, focus, progress, and continuity. For autonomy, zero means no meaningful choice; one means choice without guidance; two means a relevant choice with a recommendation.

Table 4.1. Observation log: what happened versus what we think it means.

What happened	What we think it means
Customer opened three emails to find the login link.	The login message may not be recognizable or easy to retrieve.
Customer asked a colleague which plan to choose.	The decision may require organizational agreement, not more product copy.
Customer completed setup but did not return.	Setup completion may not represent first value.
Customer called before uploading a document.	The customer may fear making an irreversible mistake.

For example, a customer opening three emails to find a login link is an observation. The idea that the login message is hard to recognize is a possible explanation.

Table 4.2. Evidence, possible explanation, and how to check it.

Evidence	Possible explanation	How we can check
Three customers delayed the same upload.	They do not understand why it is needed.	Rewrite the request with purpose and handling details; compare completion and questions.

If three customers delay the same upload, one explanation is that they do not understand why it is needed. You could explain the purpose and handling of the document, then compare completion and questions.

Table 4.3. Customer journey map template, from commitment to independent value.

Stage	Customer goal	Customer action	Business action	Evidence of progress	Question or risk
Commitment	Confirm I made the right choice	Review confirmation	Send receipt and clear next step	Customer knows what happens next	Does the confirmation match the sales promise?
Preparation	Gather what is required	Find documents and stakeholders	Explain purpose, owner, and deadline	Required inputs are complete	Is the customer waiting on someone else?
First action	Begin useful work	Complete the smallest meaningful task	Guide, confirm, and respond	A real output exists	Is this value or only setup?
First value	See evidence the choice can work	Review or use the result	Interpret the result and name next step	Customer can describe the gain	Does the customer recognize the win?
Independent use	Repeat without rescue	Perform the next cycle	Reduce guidance; keep help visible	Customer succeeds with less assistance	Is support fading too early?

At each stage, record the customer's goal and action, the business action, evidence of progress, and any question or risk.

Table 4.4. Evidence table built from existing business records.

Record	Customer was trying to...	Blocked by...	Business response	Journey implication

Table 4.5. Evidence meeting decision record.

Decision	Evidence	Assumption still open	Owner	Test	Review date

CHAPTER 4

Research decision

We need to decide whether to change _____ because customers appear to struggle with _____.

CHAPTER 4

Survey decision rule

If customers answer this way, we will consider doing _____. If they answer another way, we will consider _____.

Table 5.1. The onboarding quality spectrum: bad, good, and great.

Dimension	Bad	Good	Great
First interaction	Work before value	Clear path to value	Useful result or credible preview of it
Information requests	Everything upfront	Staged and explained	Requested in context, when needed
Guidance	Generic and forced	Optional and sequential	Role- and behavior-aware
Progress	Hidden or administrative	Visible milestones	Evidence of growing capability
Starting state	Blank	Examples available	Relevant template, data, or context preloaded
Support	Reactive and slow	Easy to reach	Timed to likely moments of friction
Handoff	Customer repeats the story	Context transfers internally	Relationship feels continuous
Success measure	Steps completed	First value reached	Customer can repeat and extend the result

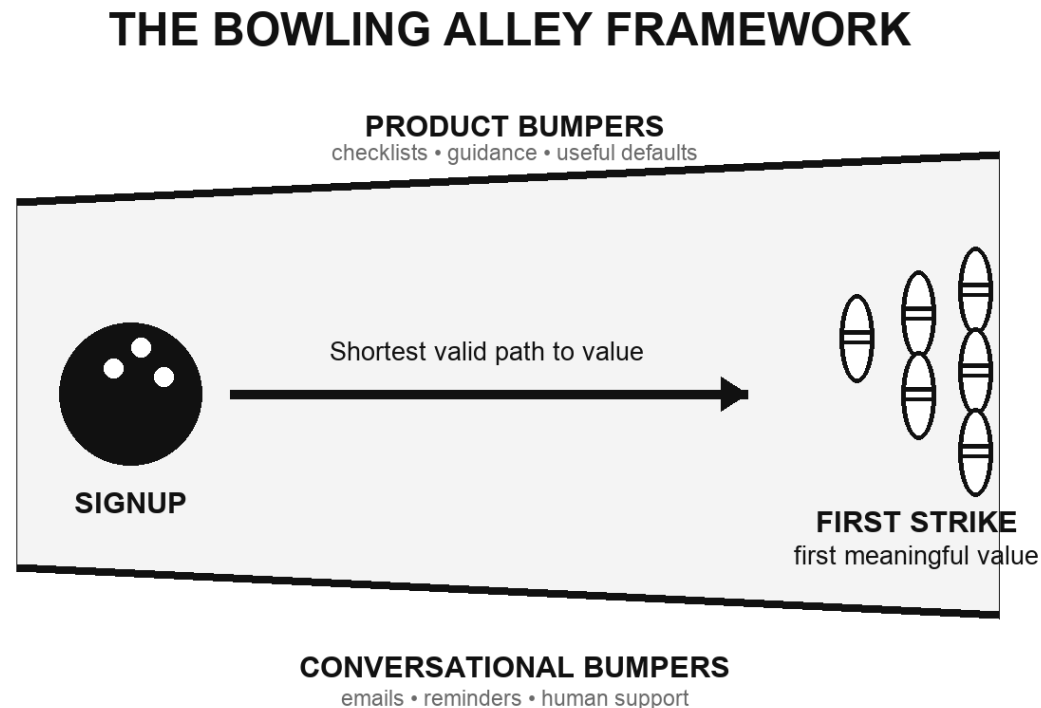
The spectrum compares eight dimensions, including guidance, information requests, progress, support, and handoff. For example, a bad starting state is blank; a good one offers examples; a great one includes relevant context or a useful template.

Table 6.1. Choosing an onboarding model by situation.

Situation	Primary model	Useful secondary model
High-value, complex, multi-stakeholder implementation	High-touch or sales-led	Tech-touch for reminders and resources
Moderate complexity with repeatable setup	Low-touch	Tech-touch plus milestone reviews
Low-price, high-volume, quick path to value	Product-led or tech-touch	Community for examples and peer help
Creative or highly configurable product	Product-led	Community-led templates and showcases
Early-stage business still learning the customer	Founder-led high-touch	Light automation for logistics

A complex implementation may need high-touch or sales-led support, with automation handling reminders. A simple, high-volume offer may suit product-led or tech-touch onboarding.

Figure 6.1. The Bowling Alley Framework shows a customer moving from signup toward a first meaningful result, guided by product and conversational bumpers.



Bumpers keep the customer moving toward the outcome without adding unnecessary steps.

Table 6.2. One-page handoff record.

Element	What to capture
Desired outcome	The result the customer expects, in the customer's words
Evidence of success	How both sides will know the outcome has been reached
Stakeholders	Decision-maker, day-to-day owner, users, and potential blockers
Scope and commitments	Deliverables, dates, exceptions, and promises made during the sale
Dependencies and risks	Access, integrations, approvals, constraints, and open questions
First milestone	The earliest result the onboarding team will deliver or enable

The handoff record captures the desired outcome, evidence of success, stakeholders, commitments, dependencies, and first milestone.

Table 6.3. Milestone definition fields, with Amanda's course-platform example.

Milestone field	Example for Amanda's course platform
Customer action	Completes the recommended first lesson
Evidence	Lesson output submitted or saved
Owner	Customer, supported by product guidance
Expected window	First seven days
Stall response	Goal-specific reminder, then invitation to office hours

Amanda's example defines the action as completing the recommended first lesson, the evidence as a submitted or saved output, and the expected window as the first seven days. It also names the owner and response to a stall.

Choose your onboarding model

For [customer segment], we will use [primary model], supported by [secondary model], because their path to first value requires [level of complexity, risk, and human judgment].

Can the customer reach a useful result through this model?

Can the business afford to deliver it consistently?

Does the model preserve human help where judgment or trust matters?

Are the milestones observable?

Can the process become more efficient without becoming less personal?

Table 7.1. The capability ladder: levels, customer capability, and evidence.

Level	Customer capability	Evidence
Orientation	Knows the goal, route, owner, and immediate next step	Can explain what happens next
Guided action	Completes a meaningful task with support	Produces a real result
Interpreted result	Understands what the result means	Makes one sound next decision
Repeated action	Performs the task again with less guidance	Completes a second cycle
Independent operation	Handles the normal path and knows when to ask for help	Succeeds without rescue

The capability ladder moves from orientation to guided action, interpreting the result, repeating the action, and operating independently. Each level requires observable evidence.

Table 7.2. Fading guidance across successive attempts.

Attempt	Guidance	Customer responsibility	Evidence
First	Demonstration and guided steps	Follow and ask questions	Completes a real task
Second	Short checklist and feedback	Make routine decisions	Repeats with fewer prompts
Third	Reference and exception support	Run the normal path	Succeeds independently

On the first attempt, demonstrate and guide. On the second, offer a short checklist and feedback. On the third, provide reference material and help with exceptions while the customer runs the normal process.

Table 7.3. Weak completion signals versus stronger evidence.

Weak completion signal	Stronger evidence
Watched setup video	Completed setup and verified the result
Attended kickoff	Can name the goal, owner, next milestone, and major risk
Opened the guide	Used the guide to complete a real task
Finished all lessons	Applied the method to a real situation
Invited teammates	Teammates completed the first shared workflow

Watching a setup video is weaker evidence than completing setup and verifying the result. Finishing lessons is weaker evidence than applying the method to a real situation.

Table 7.4. Teaching the people around the customer, by role.

Role	Primary question	Learning need	Useful format
Sponsor	Is this producing the promised result?	Outcome, risk, progress, decision points	Short review or one-page brief
Operator	How do I perform the work?	Sequence, practice, feedback, exceptions	Guided task plus checklist
Contributor	What do you need from me?	Input, quality standard, deadline	Focused request with example
Approver	What am I deciding?	Criteria, tradeoffs, consequence of delay	Decision summary

A sponsor needs outcomes, risks, and decision points. An operator needs practice and feedback. A contributor needs a clear request and quality standard. An approver needs criteria and tradeoffs.

Table 7.5. Minimum effective curriculum plan.

Milestone	Customer can...	Essential knowledge	Practice	Feedback	Help fades when...
First useful action	Produce the first result	Goal, input, safe starting choice	Complete a small real task	Specific confirmation	Result is correct
Interpret	Explain what the result means	Two or three decision rules	Choose the next action	Review and correction	Choice is sound
Repeat	Perform the normal cycle	Sequence and checkpoints	Complete second cycle	Exception-focused feedback	Routine work succeeds
Operate	Work independently	Limits and help routes	Handle a normal variation	Support on demand	Customer knows when to escalate

Plan the essential knowledge, practice, feedback, and point at which help can fade for each milestone. The four milestones are producing a first result, interpreting it, repeating the normal cycle, and operating independently.

Table 7.6. Four levels of capability evidence and their limitations.

Evidence	What it shows	Limitation
Recognition	Customer can identify the right answer	May not transfer to action
Explanation	Customer can state the reasoning	May remain theoretical
Demonstration	Customer can perform in a prepared setting	May not survive normal variation
Independent application	Customer performs in real context	Strongest evidence, but may take longer to observe

Recognition can stop at identifying an answer. Explanation can remain theoretical. Demonstration can succeed only in a prepared setting. Independent application shows performance in the real context, though it may take longer to observe.

CHAPTER 7

Define independent success

After onboarding, the customer can _____ without _____.

What must the customer be able to decide? What must they be able to do? What mistakes must they recognize? What information must they find? When is help still appropriate?

Table 8.1. Welcome packet: what happens next.

When	What we do	What you do
Today	Confirm your owner and open the workspace	Complete the next action above
<i>Date</i>	Review your information and prepare	Gather <i>specific material or access</i>
<i>Date</i>	Hold kickoff or guided setup	Bring <i>named stakeholders</i>
<i>Date</i>	Deliver or enable the first milestone	Review, use, or approve it

For each date, tell the customer what your business will do and what they need to do. The welcome packet example moves from confirming an owner and opening the workspace to preparation, kickoff, and the first milestone.

Table 8.2. Kickoff agenda template.

Time	Topic	Decision or output
0–5 min.	Introductions and roles	Who owns what on each side
5–12 min.	Desired outcome	One primary outcome and evidence of success
12–20 min.	Milestones and dependencies	Dates, prerequisites, and approvals
20–25 min.	Communication and escalation	Channels, cadence, response expectations
25–30 min.	Risks and next actions	Named actions with owners and due dates

The sample thirty-minute kickoff allows five minutes for introductions and roles, seven for the desired outcome, eight for milestones and dependencies, five for communication, and five for risks and next actions.

Table 8.3. First-value checkpoints and review questions.

Checkpoint	Questions
First value	Did the customer receive the benefit we promised? Can we prove it?
Adoption	Can the customer repeat the core action? Who is not participating?
Risk	What is stalled, and is the cause clarity, access, skill, priority, or trust?
Momentum	What is the next useful outcome, and who owns it?

Review whether the promised benefit was received, whether the customer can repeat the core action, what is stalled, and who owns the next useful outcome.

Table 8.4. Client onboarding SOP: roles and responsibilities.

Role	Responsibility
Onboarding owner	Owns progress, communication, and risk
Delivery owner	Produces or enables the first result
Sales owner	Transfers context and resolves promise gaps
Customer owner	Provides inputs, decisions, and participation

Assign ownership for onboarding progress, delivery of the first result, transfer of sales context, and the customer's inputs and decisions.

Table 8.5. Client onboarding SOP: procedure by CLEAR stage.

CLEAR stage	Action	Owner	Deadline and evidence
C — Clarify the promise	Confirm fit, scope, responsibilities, and the expected result.	Role	Before delivery: agreed promise and success statement.
L — Lower the effort	Give one next action, remove duplicate requests, and assign handoffs.	Role	Before the first task: customer can find and take the next step.
E — Enable the first win	Align the people, deliver the first useful result, and confirm receipt or use.	Role	Agreed milestone date: first-value evidence recorded.
A — Advance independence	Support practice, then check repeat use with less guidance.	Role	Before reducing support: capability and remaining help needs recorded.
R — Review continuing value	Compare results with the promise and agree on ongoing support.	Role	Agreed review date: next outcome, owner, and help route confirmed.

Table 8.6. Client onboarding SOP: revision history.

Version	Date	Owner	Change and reason
1.0	<i>Date</i>	<i>Name</i>	Initial working version

Keep the version, date, owner, and reason for each change.

Table 8.7. Choosing tools by function: minimum capability and when to upgrade.

Function	Minimum capability	Upgrade when
Customer record	One source of truth for owner, status, and commitments	Records are duplicated or handoffs are missed
Communication	Triggered and personal messages with replies reaching a person	Manual sends are late or inconsistent
Intake	Secure forms with required logic and export	Questions vary by segment or requirements increase
Work management	Named tasks, owners, dates, and dependencies	Spreadsheets no longer show reliable status
Knowledge	Searchable, versioned guidance	The same questions consume repeated staff time
Measurement	Milestone events, timestamps, and cohorts	You cannot see where customers stall

Choose tools by the work they must support: customer records, communication, intake, task management, knowledge, and measurement. Upgrade when a specific limitation is causing missed work or unreliable information.

Table 8.8. The human–automation boundary by touchpoint.

Touchpoint	Default	Why
Record creation, folders, tasks	Automate	Repetitive and rules-based
Accurate welcome delivery	Automate with review	Speed helps; errors damage trust
Intake reminders	Automate, then escalate	Routine until the stall persists
Kickoff and outcome definition	Human	Requires judgment and alignment
Routine progress updates	Template or automate	Consistency matters
Scope, risk, and disappointment	Human	Context and trust matter
Milestone recognition	Automate selectively	Useful when tied to a real achievement
Transition of relationship	Human	Continuity matters more than speed

Routine record creation and reminders can often be automated. Outcome definition, scope disagreements, risk, and the transition of a relationship require human judgment.

Template 1: Welcome packet

WELCOME TO [COMPANY]

Prepared for [Customer] on [Date]

Your onboarding contact

[Name and title]

[Email] | [Phone or booking link]

Typical response window: [Business hours or response standard]

Your first milestone

By [date], we'll help you [first meaningful outcome].

Your next action

[One action, one owner, one due date, one direct link]

What happens next

Reference: Table 8.1. Welcome packet: what happens next.

How we communicate

Primary channel: [Email, portal, Slack, Teams, or other]

Routine updates: [Cadence and owner]

CHAPTER 8

Template 1: Welcome packet (continued)

Urgent issues: [Channel and definition of urgent]

Decisions and approvals: [Where they're recorded]

If the plan changes

[Explain the change-control process in two or three sentences.]

Exit condition: The customer knows who owns onboarding, what to do next, and what first success looks like.

Template 2: Lean client intake

ABOUT THE ENGAGEMENT

What result matters most in this engagement?

How will you measure that result?

What have you already tried?

What could prevent progress?

Are there fixed deadlines or events we must plan around?

PEOPLE AND DECISIONS

Who owns the work on your side?

Who gives final approval?

Who else should receive updates or participate?

What's the best channel and cadence for routine communication?

MATERIALS AND ACCESS

What systems, files, credentials, or prior work will we need?

Who can provide each item, and by when?

Are there privacy, security, legal, or compliance restrictions we should know about?

Template 2: Lean client intake (continued)

CONTEXT

What would make this process feel unusually easy for you?

Is there anything important we didn't ask?

Add industry-specific questions only when the answer changes delivery. An accountant may need entity and fiscal-year information. A creative agency may need brand standards and an approval process. A software company may need integration owners and security requirements. Avoid asking for information already captured in the sales record.

Before moving on, check that the customer can find and complete the next action, and that the onboarding owner has the information and access needed to support it. Explain any necessary delay. A completed intake form alone doesn't tell you the path is manageable.

Template 3: Kickoff agenda

Reference: Table 8.2. Kickoff agenda template.

Ask these four questions:

“What does success look like, measured how, and by when?”

“Who owns each customer-side action?”

“What is most likely to delay or derail us?”

“How should we handle routine updates, decisions, and urgent issues?”

Send a recap the same business day when possible. Record decisions, open questions, actions, owners, deadlines, and the next meeting. If you record the call, ask permission and follow applicable privacy and retention rules.

Exit condition: Everyone can state the first milestone, their responsibilities, and the next dated action.

Message 1: Welcome and orient

Trigger: Agreement or signup confirmed

Purpose: Confirm the choice and point to one next action

Subject: Welcome, [Name]—your next step

Hi [Name],

You're all set. I'm [Name], and I'll guide your onboarding.

Your first milestone is [outcome] by [date].

Please start here: [one action and link].

After that, [brief description of what happens next]. If anything is unclear, reply here and it will reach me.

[Signature]

Message 2: Guide the first action

Trigger: Customer is ready but hasn't begun the core action

Purpose: Make the next move smaller and clearer

Subject: Start [outcome] with this one step

Hi [Name],

The next step is [specific action]. It usually takes about [honest estimate].

[Action]

[Action]

[Action]

Direct link: [URL]. If you would rather do it together, book [short help option].

[Signature]

Message 3: Recover a stall

Trigger: The expected action hasn't happened

Purpose: Diagnose, not pressure

Subject: Is anything blocking [milestone]?

Hi [Name],

I noticed [specific milestone] is still open. That may simply mean your priorities shifted, but I want to make sure the process itself isn't in your way.

Which is closest?

I need clearer instructions.

I'm waiting on someone or something.

The timing has changed.

I'm not sure this step is worth doing.

Reply with the closest answer, or choose a ten-minute time here: [link].

[Signature]

Message 4: Reinforce progress

Trigger: First value or another meaningful milestone completed

Purpose: Name the result and point to the next one

Subject: You reached [milestone]—what it unlocks

Hi [Name],

You completed [milestone]. That means [plain-language benefit].

The next useful step is [action] by [date]. Use this link: [URL].

[Signature]

Message 5: Close onboarding and continue the relationship

Trigger: Independent value confirmed

Purpose: Mark the transition and establish the next rhythm

Subject: Your onboarding is complete—what comes next

Hi [Name],

You can now [capability or result]. We've completed [key milestones], with [open item, if any] remaining.

From here, [ongoing contact or support route] will help with [scope]. Our next review is [date].

Before we close this phase, what felt clear, what took too much effort, and what should we change?

[Signature]

These messages sound human because they refer to a real action, a real result, or a real stall. Avoid fake personalization such as inserting a first name into a generic blast.

Template 4: Client onboarding SOP

Title: New Customer Onboarding

Owner: [Role]

Version: [Number]

Last reviewed: [Date]

Next review: [Date]

1. Purpose

Move a confirmed customer from agreement to independent first value with clear ownership, consistent communication, and no lost context.

2. Scope

Starts when [trigger]. Ends when [observable exit condition]. Applies to [segments or exclusions].

3. Roles

Reference: Table 8.4. Client onboarding SOP: roles and responsibilities.

For a solo business, one person may hold several roles. Keep the roles separate on paper so the work remains visible.

Template 4: Client onboarding SOP (continued)

4. Procedure

Assign an owner and a realistic deadline to each stage. Use the evidence column to define what the customer should be able to show, not merely what the team should have sent. Expand a row into smaller tasks where the work requires it.

Reference: Table 8.5. Client onboarding SOP: procedure by CLEAR stage.

5. Exceptions and escalation

If scope changes, pause affected work and document cost and timeline impact before proceeding.

If the customer is unresponsive, follow the agreed recovery sequence, then offer a documented pause.

If a promise can't be met, involve the sales and delivery owners immediately and reset the expectation with the customer.

If privacy, security, or compliance is uncertain, stop the affected data handling and consult qualified guidance.

6. Records

List what's stored, where it's stored, who may access it, and how long it's retained. Don't invent a retention period from a template; choose one that fits your contracts and legal obligations.

7. Revision history

Reference: Table 8.6. Client onboarding SOP: revision history.

Review the SOP after the first three customers, then quarterly or after a meaningful failure. A revision history helps the team understand why a rule exists.

Table 9.1. Continuation measures by business rhythm.

Business rhythm	Useful continuation measure
Daily or weekly product	Meaningful day-7 or week-4 retention
Monthly workflow	Completion of the next monthly cycle
Project-based service	Use or implementation of the delivered work
Recurring advisory service	First renewal or next scheduled review completed
Multi-user implementation	Intended roles actively using the core workflow

A daily product may use a day-seven retention measure. A monthly workflow needs evidence from the next monthly cycle. A project service should check whether the delivered work is used.

Table 9.2. One-page scorecard: outcome record.

Customer/cohort	Start date	Activation date	Time to value
<i>Name or cohort</i>	<i>Date</i>	<i>Date</i>	<i>Duration</i>

The outcome record captures the customer or cohort, start date, activation date, and time to value.

Table 9.3. One-page scorecard: diagnostic record.

Customer/cohort	Activation event	Continuation check	Effort or stall reason
<i>Name or cohort</i>	<i>Event</i>	<i>Result/date</i>	<i>Score, comment, or reason</i>

The diagnostic record adds the activation event, continuation check, and effort score or stall reason.

Table 9.4. Observed friction, possible cause, and test.

Observation	Possible cause	Test
Customers abandon intake	Questions feel irrelevant or require unavailable information	Remove or defer nonessential questions
Customers start but do not reach value	Blank state creates too many decisions	Provide a goal-specific template
Customers miss milestones	Ownership or dates are unclear	Add one owner, one due date, and one direct link
Activated customers do not continue	First result is not repeatable or embedded in routine	Add a repeat-use plan at activation
Effort drops at handoff	Context is being lost internally	Introduce the new owner early and share a handoff record

If customers abandon intake, test whether nonessential questions can be removed or deferred. If they activate but do not continue, test a repeat-use plan.

Table 9.5. Cohort outcomes comparison.

Cohort	Version	Activation	Median time to value
<i>Period</i>	A	<i>Rate</i>	<i>Time</i>
<i>Period</i>	B	<i>Rate</i>	<i>Time</i>

Table 9.6. Cohort diagnosis comparison.

Cohort	Version	Continuation	Main stall
<i>Period</i>	A	<i>Rate</i>	<i>Reason</i>
<i>Period</i>	B	<i>Rate</i>	<i>Reason</i>

Keeping both comparisons lets you see an early improvement alongside what happens afterward.

Table 9.7. The four-phase improvement cycle.

Phase	Question	Output
Measure	What is happening?	Activation, time-to-value, continuation, and effort baseline
Diagnose	Where and why are customers stalling?	One prioritized constraint supported by behavior and feedback
Test	What change should remove that constraint?	A written hypothesis and comparison plan
Standardize	Did it work, and how will we keep it?	Updated workflow, SOP, and measurement note

The improvement cycle is measure, diagnose, test, and standardize. Establish the baseline, identify one supported constraint, test a written hypothesis, and keep the change through an updated workflow and measurement note.

CHAPTER 9

Customer effort question

[Company] made it easy for me to [complete the milestone].

Use a consistent agreement scale, then ask:

What could we have made easier?

Table 10.1. Early-warning signals: review owner, timing, and customer-contact rule.

Signal	Review owner	Review time	Customer contact rule
Missed customer milestone	Onboarding owner	Same business day	Contact if the step blocks value or timing matters
Failed payment or integration	Operations or support	Immediate during service hours	Explain effect, preservation of work, and next action
Internal deliverable at risk	Accountable delivery owner	Before the customer deadline	Contact before the promise is missed
Repeated customer error	Support or success	After the second failure	Offer a different route, not the same instruction
Negative or urgent message	Named human owner	Within the stated response window	Stop promotional automation and acknowledge

Every warning needs a review owner, a review time, and a rule for contacting the customer. For example, an internal deliverable at risk should be reviewed before the customer's deadline, with contact before the promise is missed.

Table 10.2. Recovery severity scale: level, typical condition, and response.

Level	Typical condition	Response
1: Friction	Small delay or confusion; value path intact	Clarify, correct, and monitor
2: Block	Customer cannot reach the next milestone	Human owner, alternate path, timed updates
3: Broken promise	Commitment, deadline, price, or scope not met	Senior ownership, restoration plan, appropriate remedy
4: Risk or harm	Safety, privacy, financial, legal, or material operational impact	Stop affected process; involve authorized specialists; follow incident and notification obligations

The severity scale moves from friction to a blocked milestone, a broken promise, and risk or harm. The response increases from clarification and monitoring to human ownership, a restoration plan, or stopping the affected process and involving authorized specialists.

Table 10.3. Internal failure-review record.

Question	Record
What failed?	Specific event and customer impact
Where should it have been prevented?	Policy, design, validation, ownership, or training control
Where should it have been detected?	Signal, checkpoint, alert, or review
What made recovery harder?	Missing authority, data, handoff, template, or tool
What changed?	Concrete preventive and recovery action
Who owns the change?	One accountable person and date
How will we know?	Leading signal and recurrence check

The failure review asks what failed, where prevention and detection should have happened, what hindered recovery, and what will change. It also names an owner, a date, and evidence to check.

Table 11.1. SaaS service models: when to use each and the human role.

Model	Use it when	Human role
Self-service	Setup is simple and low-risk	Help on request
Assisted	Configuration or education affects success	Intervene at key milestones
High-touch	Several stakeholders or systems are involved	Coordinate the plan and handoffs

Self-service fits simple, low-risk setup with help on request. Assisted service adds intervention at important milestones. High-touch service coordinates complex systems or several stakeholders.

Table 11.2. Designing the ecommerce waiting period.

Moment	Customer question	Your answer
Order confirmed	Did it work?	Confirm the order and next step
Order in transit	Where is it?	Give current tracking and a realistic date
Order delivered	How do I get value?	Explain first use, care, or setup

During the waiting period, answer the question at hand: did the order work, where is it, and how do I get value from it?

Table 11.3. Pre-visit touchpoints for healthcare practices.

Touchpoint	Timing	Purpose
Intake	After scheduling	Collect only what is needed before the visit
Preparation	One to two days before	Explain documents, preparation, parking, and access
Confirmation	Before arrival	Confirm time, location, and contact path
Follow-up	After the visit	Clarify next steps and invite feedback

The pre-visit sequence covers necessary intake after scheduling, preparation before the appointment, confirmation before arrival, and clear next steps afterward.

Table 11.4. Trust-building responses across a trades or home-services job.

Stage	Customer concern	Trust-building response
Inquiry	Will they respond?	Acknowledge promptly and name the next step
Estimate	Will the price hold?	Itemize scope, assumptions, and change approval
Scheduling	Will they show up?	Give a useful arrival window and updates
Service	Will they respect my home?	Explain the work and protect the space
Follow-up	What if something fails?	Provide warranty, contact, and maintenance information

For a trades or home-services customer, trust depends on a response, clear scope and change approval, a useful arrival window, respect for the home, and a route for help afterward.

Table 12.1. Promise-versus-experience record.

Original promise	Evidence so far	Gap	Next decision
Reduce weekly scheduling time	First schedule published in 40 minutes	Revisions still require manual messages	Test team notification workflow
Make project approvals clearer	First review completed with one decision log	Two stakeholders still respond outside the process	Agree on one approval channel
Apply one technique to real work	First exercise completed	No real project submitted	Choose one live project and deadline

Record the original promise, evidence so far, the remaining gap, and the next decision. For example, a completed exercise still leaves a gap if the promise was applying a technique to real work.

Table 12.2. First-win and second-win examples.

First win	Second win
Send a test invoice	Send and track a real customer invoice
Build a sample campaign	Launch to a small real audience and review response
Complete a guided exercise	Apply the method to a live project
Approve a sample workflow	Use the workflow with the full decision team
Perform a task with a specialist	Repeat the task using a checklist

A first win might be sending a test invoice; a second is sending and tracking a real customer's invoice. A guided exercise can lead to applying the method in a live project.

Table 12.3. Four roles in the real unit of success.

Role	Needs to know	Needs to do	Evidence
Sponsor	Why the change matters and how progress will be judged	Protect priority and remove barriers	Reviews agreed outcome
Operator	How to perform the normal work	Complete routine actions	Produces the result
Contributor	What input is required and when	Supply information or decisions	Meets the handoff standard
Reviewer or approver	What decision they own	Review using agreed criteria	Decision is recorded

The sponsor protects priority, the operator performs the routine work, the contributor supplies required inputs, and the reviewer records decisions using agreed criteria.

Table 12.4. Ownership transition record.

Item	Record
Original outcome	
First and second wins	
Capability achieved	
Normal operating rhythm	
Known exceptions or risks	
Stakeholders and owners	
Next review and evidence	

The transition record carries forward the original outcome, first and second wins, capability, operating rhythm, risks, stakeholders, and next review.

Continuation rule

When _____ happens, the customer will _____ so that _____.

Table 13.1. AI capabilities: good first uses and what to keep human.

Capability	Good first use	Keep human
Answer	Stable, routine questions	Exceptions and promises
Detect	Missed milestones or repeated errors	Outreach and judgment
Adapt	Content by stated goal or role	High-consequence decisions

Artificial intelligence can answer routine questions, detect missed milestones, or adapt content to a stated role. Keep exceptions, promises, consequential decisions, and outreach judgment with people.

Table 13.2. Technology readiness: adopt, watch, or leave alone.

Readiness	Consider when	Examples
Adopt	The problem is proven and the action is bounded	Searchable help, routine-answer assistant, stalled-step alerts
Pilot	Value is plausible but errors need review	Adaptive paths, AI summaries, suggested outreach
Watch	Autonomy or data access creates material risk	Multi-system agents, predictive high-stakes decisions
Leave alone	The use case is mostly novelty	Immersive or synthetic experiences with no customer demand

Adopt tools for proven, bounded problems. Pilot plausible uses with review. Watch developments that create material autonomy or data risks. Leave novelty without customer demand alone.

Table 14.1. Starting service model by situation.

Situation	Starting model
Simple, low-risk, repeatable	Self-service with visible help
Moderate setup or uncertainty	Hybrid with a milestone check-in
Complex, high-risk, multi-stakeholder	Human-led with automated logistics

Start with visible-help self-service for simple, low-risk work; a hybrid with a milestone check for moderate uncertainty; and human-led onboarding with automated logistics for complex or high-risk work.

Scope statement

For [customer] who has just [starting event], we will improve the path to [first-value outcome].

First-value statement

A new customer has experienced first value when they have [observable action or result].

Test hypothesis

We believe [customers] are stalling at [step] because [reason]. If we [change], then [outcome] should improve.

CHAPTER 14

Effort question after getting started

[Company] made it easy for me to get started.

Use a consistent response scale and add one open question: What could we have made easier?

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