

Recognizing Customer Success

Draft the opening of Worksheet 1.1, your project charter. Explain why the customer bought, distinguish the four milestones, and identify evidence for each. These definitions will develop as you investigate and test the journey.

Name: _____ Date: _____

Write on these pages, or use the accompanying editable HTML workbook. Continue on an extra sheet when needed.

1. My project or supplied case

2. My customer bought this because they wanted to...

3. Purchase / commitment: what would happen in my project?

4. Purchase / commitment: what evidence would support that conclusion?

Continue your response

5. Administrative readiness: what would happen in my project?

6. Administrative readiness: what evidence would support that conclusion?

7. First useful value: what would happen in my project?

8. First useful value: what evidence would support that conclusion?

Continue your response

9. Independent value within the customer’s role: what would happen in my project?

10. Independent value within the customer’s role: what evidence would support that conclusion?

11. What is provisional, and what do I need to check?

LESSON 1.1.1 / FEEDBACK

Review your work

1. Does first value describe a concrete customer benefit?
2. Does independence identify appropriate customer action or judgment?
3. What would you observe to support either conclusion? Label provisional definitions and evidence gaps.

Worked teaching example

In the fictional salon example, payment establishes commitment and a correctly configured calendar establishes administrative readiness. An accurate, usable booking from a real customer without a phone call provides an early benefit. Appropriate independence requires observing routine work with the expected support, such as changing availability and recognizing when help is needed. A staff test booking checks setup; it does not establish the same customer benefit. One useful booking does not prove a lasting reduction in workload or retention.

One revision I will make

This lesson contributes to Worksheet 1.1. It does not introduce a separate assessment score or pass threshold. Keep the teaching example separate from evidence about your own case.