



01 / WORKING SHEET

Assess one journey first.

Choose a journey and a customer group. Tick only what you can demonstrate today. This is a working framework, not an industry benchmark or certification.

Journey / customer group**Owner / review date**

1. Broadcast

A planned communication with a clear purpose.

☐ Audience and permissions checked☐ Response and complaints reviewed

2. Sequences

A lifecycle event starts a journey with a defined goal.

☐ Entry and exit rules documented☐ Activation or conversion measured

3. Branching

Behaviour changes the next step.

☐ Completed work changes the path☐ Missing and repeated events tested

4. Coordination

Product, marketing and sales use compatible context.

☐ Priorities and suppression agreed☐ A named person owns each handoff

5. Bounded agency

An approved system chooses within explicit limits.

☐ Permissions, review and stop controls☐ Outcome and quality evidence reviewed

The most useful next capability



02 / WORKING SHEET

Map the two buying motions.

Use buying needs and product evidence to choose the route. Company size is context, not a fixed rule. Write how the customer can move between self service and human help.

Product led / self service

Help a customer reach value.

Customer need

What job are they trying to complete?

Useful signal

Which event provides reliable evidence?

Next action

What happens, and through which channel?

Owner and response

Who takes responsibility, and by when?

Pause or handoff

What should stop, continue or change?

Success measure

Name the outcome, cohort and time window.

Sales assisted

Help an account resolve complexity.

Customer need

What job are they trying to complete?

Useful signal

Which event provides reliable evidence?

Next action

What happens, and through which channel?

Owner and response

Who takes responsibility, and by when?

Pause or handoff

What should stop, continue or change?

Success measure

Name the outcome, cohort and time window.



03 / WORKING SHEET

Choose the first workflow.

Compare a small set of candidates. Prioritise a measurable customer problem with usable data and a clear owner. A complex workflow is not automatically the most valuable.

Workflow candidate	Customer outcome	Data gap / owner

Pilot agreement

Selected workflow and accountable owner

Baseline and comparison group

Success measure and review date

Conditions to stop, fix or expand

Keep the business case honest

Include setup and ongoing costs. Separate released time from cash savings. Test revenue claims against a comparison. Do not count the same benefit twice.

Read the framework and worked examples at syfur.uk/blog