Build a connected evidence workflow

A fillable planning workbook for five connected lessons and one practical pilot.

Use the fictional course example first. Then adapt the five-part plan to your own collection, analysis and reporting workflow. Record the sources, definitions, review decisions and access needed to make it useful.

Download and open this PDF in a PDF reader that supports forms. Type in the shaded boxes and save a copy. You can also print it and write by hand. Some browser viewers handle saving differently: reopen your saved copy to check your answers.

Use fictional or de-identified material for practice. This workbook does not send or store your answers on a website. Completion is a planning exercise, not certification of an implemented system.

Your workflow and decision question and one workflow to test

Who will help you test the plan? Record the owner and a review date.

1. Plan the collection

A lifecycle collection map linking meaningful check-ins, support records and account events.

Practice context: Onboarding - Setup response and service record - Can the customer use the service?; Check-in - Score and original comment - What friction needs attention?

On workbook page 2, map one customer journey and its collection moments. Include source, timing, identity approach and follow-up owner. Identify the few shared fields, the local fields and which profile details should be reused or updated.

Name shared and local fields. Which profile details can be reused, and when do they change?

Self-check: Can the team explain what action each collection moment enables?

2. Review the issue

A source-linked issue record with a clear interpretation, owner and next step.

Practice context: Customer statement - New appointment time is unclear - Keep the original wording; Service record - Schedule updated - Does not establish customer confirmation

On workbook page 3, create an issue record from the two accounts. Specify evidence, category, uncertainty, owner and next action.

Record your decision, unresolved question, owner and next review date.

Self-check: Could another reviewer see why this action was chosen?

3. Connect the history

A timeline and comparison plan that includes retained accounts and missing feedback.

Practice context: Sequence - Avoid using later information as an earlier signal - Event and entry dates; Coverage - Avoid describing respondents as everyone - Eligible, invited and responding accounts

On workbook page 4, place C-104's events on a timeline and define the accounts included in a comparison.

Record your decision, unresolved question, owner and next review date.

Self-check: Can you explain which information was available before the outcome?

4. Define the comparison

A dictionary for scores, issue categories, resolution and comparison populations.

Practice context: Satisfaction - Question, scale and population - Not the full customer base by default; Issue rate - Category and eligible records - Affected by reporting coverage

On workbook page 5, define one score, one issue category and customer-confirmed resolution. Write a trend statement with its limits. Map one local field to a common definition. Give one example that must remain separate.

Map one local field to a shared definition. What cannot be combined, and why?

Self-check: Could a reader interpret the trend without guessing its denominator?

5. Govern and act

A tested follow-up workflow connecting service ownership, customer confirmation and team learning.

Practice context: Customer - Clear response and next step - Confirm or clarify their experience; Service owner - Relevant sources and action status - Follow through

On workbook pages 6 and 7, run C-104’s issue from response to confirmation and team learning. Include a denied access test.

Record your decision, unresolved question, owner and next review date.

Self-check: Can you show what the customer received and what the team learned?

Test the complete workflow

Use fictional records first, then agree a small authorized pilot with the responsible people.

- [ ] A contributor can submit the intended information.
- [ ] An unrelated reader cannot access restricted evidence.
- [ ] A correction preserves the original and its reason.
- [ ] A reviewer can trace a finding to its source and definition.
- [ ] The intended reader receives useful, approved findings.

Expected vs actual behavior: record gaps and the person responsible.

What will change before the next cycle? Include the next review point.