

Choose one recurring decision

Lesson 1: method.

Use the fictional service example or an existing workflow plan. A monthly team has 200 eligible accounts, 120 unique responses and 84 respondents reporting resolution.

Print and write on these pages, or copy the questions into your preferred document. Keep your answers beside the course as you work.

Decision and moment

What does the team need to decide, and when could new evidence still change that decision?

Evidence and record

What structured measures and comments are needed? Which account, person, organization or other record connects them?

Action owner

Who checks the evidence, acts on it, and returns to see what happened?

Test reliability before trusting an answer

Lesson 2: reliability.

Expected example answers: response coverage $120/200 = 60\%$; resolution among respondents $84/120 = 70\%$. The 80 nonrespondents are unknown. These counts do not prove causality.

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Known-answer tests

Write tests for coverage, resolution among respondents, duplicate, missing and corrected responses.

Qualitative review

Define one theme, inclusion and exclusion examples. Compare interpretations on ordinary and ambiguous responses.

Change test

What will be retested when an input, coding definition or analysis tool changes? Who approves the revised result?

Make one finding inspectable

Lesson 3: traceability.

Keep the original source, definition version, calculation and review connected. Give access only to people authorized to see the evidence.

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Claim and calculation

Write one precise claim, its numerator and denominator if relevant, and its limitations.

Evidence trail

Record source identifier, period, input version, definition version and reviewer.

Review and permissions

Can another authorized person reconstruct the finding? What must be withheld or de-identified?

Adapt the workflow without losing comparison

Lesson 4: flexibility.

Use the record structure your work needs. Federated teams can keep local questions while sharing the few fields and definitions needed for aggregation.

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Shared core

Which fields must align for the actual comparison? Define their units, periods and permitted values.

Local choices

What may each team change? How will its local fields map to the shared dictionary, and when is comparison inappropriate?

Maintenance

Who owns registration updates, recurring observations, permission changes and version history?

Run a small complete pilot

Lesson 5: pilot.

Test one complete cycle before expanding. Track setup, cleanup, analysis, review and maintenance effort; faster output alone does not establish a better workflow.

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Acceptance criteria

What correct results, usable evidence trails and owned actions must the pilot demonstrate?

Observed effort and issues

Record time spent at each step, failed tests, corrections and unresolved needs. Compare against your current process.

Decision and next cycle

Continue, revise or stop? Name the reason, owner, next review date and the evidence that will show improvement.
