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The AI-Augmented GTM *Playbook*

complete play library · a02

An operating manual for identifying, creating, capturing, measuring and compounding
commercial growth

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The AI-Augmented GTM Playbook

An operating manual for identifying, creating, capturing, measuring and compounding commercial growth

EDITION 1

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CH · chapter
P · Play
T · tool (working record)
C · claim record

Q · prompt (web)
D · diagnostic (web)
K · calculator (web)
REF · reference



Play Library

Select one Play from the actual constraint. The order below is an editorial route through dependencies, commercial relevance, applicability, evidence and feasibility; it is not an empirical universal ranking or an ROI score. Economic and method confidence does not establish local uplift. P01 can be the minimum economics step within another Play, rather than a separate programme.

play library · in this edition

P01	Establish decision-specific customer economics Foundational · editorial rank 1	6
P02	Remove the dominant growth constraint Growth · editorial rank 2	9
P03	Acquire customers with useful downstream value Growth · editorial rank 6	12
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P08	Grow relevant customer and account value Growth · editorial rank 10	27
P09	Turn customer and market evidence into a decision Intelligence · editorial rank 8	30
P10	Redesign and test one AI-assisted workflow Automation · editorial rank 9	33
P11	Run an accountable investment and decision review Operating model · editorial rank 11	36
P12	Replicate useful work and retire operating debt Transformation · editorial rank 12	39

Before funding, use T1 to return Do now, Prepare, Experiment or Avoid. A safety, authority, economics or evidence veto overrides rank. No more than one AI experiment is implied by this library.

Establish decision-specific customer economics

Incompatible customer, cost and outcome definitions make an investment decision unreliable.

decision

Which economic interpretation and investment limit are defensible for this intervention?

readiness

Basic

01 Fit

when to use this play

A material choice depends on CAC, contribution, payback or customer quality that cannot be reconciled.

when not to use it

The selected decision already has sufficient economics, or a full data rebuild would delay an unrelated safe improvement.

why it should work

Comparable costs and cohorts expose misleading acquisition or benefit claims and enable a better choice.

basic version

One Finance-reviewed cohort and a controlled worksheet attached to the chosen intervention.

02 Prepare

required maturity

Basic. Ready if Finance and the source owner can inspect relevant records. Not ready if the economic entity or source access is unresolved; narrow the scope first.

Check readiness for P01 (D02)

inputs

One decision, customer entity, dated cohort, net revenue, agreed variable costs, acquisition expense, outcome lag and source definitions.

audience or customer

The selected acquisition cohort or account population; no customer contact is required.

human role

Finance owns definitions and reconciliation; the commercial owner owns the changed decision; an analyst explains missing data and uncertainty.

systems required

Existing Finance, CRM or commerce exports and a controlled spreadsheet or query; versioned source links.

guardrails

Permissioned data, no double counting, no false customer joins, no silent definition changes.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	Replace competing definitions with one versioned metric contract and reconciled cohort view.	
workflow	1. Name the decision. 2. Define entity, period and cost scope. 3. Trace a record sample. 4. Reconcile totals.	5. Separate observed, forecast and incremental estimates. 6. Apply the result to the decision. 7. Record limits and owner.
ai role	Optional assist Optional explanation of signed definitions or anomaly hypotheses; no arithmetic authority or inferred missing costs.	
automation role	Queries, formulas, deduplication, reconciliation and scheduled quality checks.	
agent role	None required or recommended for the calculation.	
failure modes	⚠ Enterprise data programme by stealth ⚠ perfecting metrics no owner will use ⚠ immature cohorts treated as complete.	

04 Measure and decide

measurement	Compare decision readiness, reconciliation errors and operating effort before and after; trace any commercial gain to the subsequent intervention separately.
primary commercial metric	Net value of a demonstrably changed decision or removed reporting expense; otherwise report foundation cost, not invented ROI.
leading indicators	Resolved definition conflicts, traceable cohort coverage and time to an authorised decision.
experiment	A customer experiment is unnecessary for arithmetic repair. Validate sampled records and run the old and corrected view for a limited reconciliation period.

⏏ scale when

Reuse only when another funded decision needs the same definition and the maintenance owner can support it.

⏏ stop / reassess when

Stop expansion if reconciliation cannot support the decision or maintenance exceeds demonstrated use; retain necessary financial controls.

05 Learn and progress

learning	Store metric scope, sources, unresolved gaps, version and the actual decision it supported.
----------	---

practical tool

T2 economics and benefits ledger; T3 records the resulting decision.
T2 Economics and benefits ledger · T3 Decision experiment and evidence record · K01 CAC and tranche comparison

→| next action

reconcile one cohort before changing investment.
Open T2 Economics and benefits ledger

can repair this prerequisite for...

- [P03 Acquire customers with useful downstream value](#) (p. 12) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.
- [P04 Validate incremental acquisition](#) (p. 15) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.
- [P07 Prevent profitable addressable churn](#) (p. 24) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.
- [P08 Grow relevant customer and account value](#) (p. 27) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.
- [P10 Redesign and test one AI-assisted workflow](#) (p. 33) — Only when the selected intervention depends on unresolved customer-cohort economics. For workflow cost or other non-customer economics, use the relevant T2 view; P01 is not a prerequisite.
- [P11 Run an accountable investment and decision review](#) (p. 36) — Only when the selected intervention depends on unresolved customer-cohort economics. For workflow cost or other non-customer economics, use the relevant T2 view; P01 is not a prerequisite.

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 6).

Shared economic services and validated forecasts only after recurring demand, dependable joins and prospective model usefulness.

evidence for this play

1 claim record qualifies this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C01](#) Contribution and cash govern investment (p. 42)

play · p02

growth · demand through retention · editorial rank 2 of 12

Remove the dominant growth constraint

A product, proposition, price-clarity, journey or service bottleneck prevents valuable demand becoming customer value.

decision

Which addressable bottleneck deserves the next unit of delivery capacity?

readiness

Basic

01 Fit

✓ when to use this play

Verified leakage, complaints or operating constraints explain a material loss and an owner can change the cause.

⊗ when not to use it

The apparent loss is tracking error, the cause is unsupported, or the proposed repair cannot be delivered.

why it should work

Removing the binding constraint increases useful completion or retained value without simply purchasing more traffic.

basic version

One verified defect and a documented release/readout using existing tools.

02 Prepare

◇ required maturity

Basic. Ready if the affected path, credible customer evidence and a repair owner exist. Not ready if the diagnosis is only a dashboard correlation.

Check readiness for P02 (D02)

inputs

Journey steps, error and service records, customer interviews or feedback, cohort economics, capacity and feasible repairs.

audience or customer

Customers or prospects affected by the specific defect, proposition gap or capacity limit.

human role

Product or Service owns delivery; the commercial owner prioritises value; research and measurement challenge the diagnosis.

systems required

Existing analytics, product/service records, issue tracker and release process.

guardrails

Service reliability, accessibility, accurate prices/claims, customer trust and downstream quality.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	One material repair to the product, experience, proposition or service; pricing changes retain commercial approval.	
workflow	1. Verify measurement. 2. Locate economic leakage. 3. Inspect customer and operating evidence. 4. Compare direct repairs with more acquisition. 5. Choose one change. 6. Release appropriately. 7. Evaluate downstream quality and record the next decision.	
ai role	Optional assist Optional clustering of permitted feedback and drafting of a repair brief with source references.	
automation role	Funnel/error queries, eligibility and release monitoring.	
agent role	None needed; unusual investigations may be assessed under P10 (p. 33) separately.	
failure modes	⚠ Changing many variables ⚠ optimising a superficial click ⚠ substituting reminders or discounts for a persistent product failure.	

04 Measure and decide

measurement	Track affected eligible users through completion, activation and agreed contribution horizon; separate release effects from simultaneous changes.
primary commercial metric	Incremental contribution net of repair, delivery and support cost, or explicitly qualified observed improvement.
leading indicators	Error reduction, task completion, time to first value and support contacts.
experiment	Test uncertain alternatives where feasible. Fix obvious defects without withholding a necessary repair; use staged monitoring with causal limitations stated.

 **scale when**

Expand a safe repair or tested treatment when the mechanism and economics apply to the next affected population.

 **stop / reassess when**

Rollback on material regression; stop optional investment if the suspected constraint is unsupported or a cheaper repair dominates.

05 Learn and progress

learning	Record the cause, affected population, repair, outcome, uncertainty and conditions for reuse.
practical tool	T1 constraint view and T3 measurement plan. T1 Intervention and investment card · T3 Decision experiment and evidence record · T4 Action authority and operating contract

→| **next action**

inspect the largest economically meaningful drop-off with its delivery owner.

Open T1 Intervention and investment card

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 9).

Segment-specific experience changes only when distinct needs and incremental benefit cover maintenance and measurement cost.

evidence for this play

2 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C02](#) Repair the binding growth constraint (p. 42)

[C15](#) Every decision should be experimentally validated (p. 43)

P02 · item 1.0.0 · CONTENT-RC1 1.0.2 · Source: 03-Play-Library.md SP02 Remove the dominant growth constraint · Review 6-monthly · Edition 1 · [Contents](#) (p. 3)

Acquire customers with useful downstream value

Cheap leads or attributed conversions conceal poor activation, margin, qualification or retained value.

decision

Which eligible demand and optimisation signal should receive the next feasible acquisition tranche?

readiness

Basic or Connected

01 Fit

✓ when to use this play

Cohorts differ materially in downstream quality, or valuable eligible demand is missed by the current acquisition setup.

✗ when not to use it

Customer linkage or value definitions are unreliable, service capacity is constrained, or useful demand/proposition is absent.

why it should work

Better qualification, relevant intent and valid economic signals can align delivery with outcomes the business values.

basic version

Cohort reporting and a human-reviewed intent or qualification adjustment.

02 Prepare

◇ required maturity

Basic for cohort diagnosis; Connected for a reliable native value feed. Ready with source-to-outcome linkage. Not ready for individual prediction without validated history.

[P01 Establish decision-specific customer economics](#) (p. 6) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.
Check readiness for P03 (D02)

inputs

Acquisition source/intent, verified new-customer records, qualification, activation, contribution, refunds, service cost and outcome delay.

audience or customer

Prospective customers with relevant need and product/service eligibility; B2B uses accounts and sales outcomes.

human role

Performance or Sales owns delivery; Finance owns value definitions; measurement owns comparison; Product/Service confirms capacity.

systems required

Existing channel or CRM platform, verified outcome records and a tested native integration or manual cohort process.

guardrails

Cash, reach, new-segment exploration, fair treatment, service capacity and no misleading attribution uplift.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	Change one intent/proposition route or a validated downstream signal in existing delivery; retain a comparator.	
workflow	1. Reconcile cohort quality. 2. Diagnose mix and demand. 3. Select one signal or intent change. 4. Check native support and timing. 5. Approve the test. 6. Deliver within limits. 7. Compare mature cohort economics and revise.	
ai role	Optional assist Optional query or feedback classification. Prediction is separate statistical work with temporal validation, not an LLM estimate.	
automation role	Outcome joins, feed validation, native bidding/routing, exclusions and delayed-value reconciliation.	
agent role	None for bidding, audience rules or routine feed operation.	
failure modes	⚠ Optimising organic propensity ⚠ overconfident distant LTV ⚠ excluding new segments ⚠ duplicating a stronger native optimiser.	

04 Measure and decide

measurement	Follow eligible assigned populations and acquisition cohorts through agreed contribution and payback windows; preserve mix and lag effects.
primary commercial metric	Net incremental cohort contribution after acquisition and additional signal/system costs.
leading indicators	Verified lead/customer quality, activation, feed completeness, rejection rate and forecast-versus-realised error.
experiment	A valid platform or geographic comparison of signal/coverage where feasible; otherwise staged evidence with limits, supported by P04 (p. 15).

⬆ scale when

Increase only a feasible tranche whose economics remain acceptable under uncertainty and whose quality signal is stable.

⬇ stop / reassess when

Revert on invalid values, broken joins, unacceptable volume/quality collapse or negative incremental economics.

05 Learn and progress

learning	Record intent-to-value patterns, feed version, customer mix, effect scope and realised prediction error.
practical tool	T2 cohort and marginal tranche views; T4 feed/action contract. T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T4 Action authority and operating contract · K01 CAC and tranche comparison · K02 Net intervention value

→| next action

compare the downstream contribution of two material acquisition cohorts.
Open T2 Economics and benefits ledger

curated next play

[P12 Replicate useful work and retire operating debt](#) (p. 39) — Mature evidence, support capacity and an old-work retirement plan exist.

alternative play

[P02 Remove the dominant growth constraint](#) (p. 9) — Repair product or service friction first. When: The supported binding constraint is friction rather than acquisition quality.

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 12).
Validated contribution forecasts supplied to native optimisation; build proprietary decisioning only for an evidenced residual advantage.

evidence for this play

3 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C09](#) Observed, predicted and incremental customer value (p. 42)

[C10](#) Individual predicted cLTV for acquisition (p. 42)

[C18](#) Customer quality and native value signals (p. 43)

Validate incremental acquisition

Material media or partner spending receives credit for outcomes that may have happened without it.

decision

Keep, reduce, increase or redesign a defined acquisition tranche?

readiness

Method and sample ready

01 Fit

✓ when to use this play

A budget decision could change and a feasible holdout or other defensible comparison can detect a useful effect.

⊗ when not to use it

No budget choice is available, spillover invalidates the design, or the learning cost exceeds its decision value.

why it should work

An appropriate counterfactual separates credited activity from changed customer outcomes.

basic version

One material question and one qualified, affordable comparison; use honest limited inference when no useful test is feasible.

02 Prepare

◇ required maturity

Basic commercial records plus qualified method support. Ready with usable units, variance and outcome horizon. Not ready when sample or identification cannot inform the choice.

[P01 Establish decision-specific customer economics](#) (p. 6) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.
Check readiness for P04 (D02)

inputs

Business question, eligible units, historical variance, assignment/exposure records, all-channel outcomes, contribution, spend and concurrent changes.

audience or customer

A legitimate, separable user, account or geographic population; evaluate all assigned eligible units.

human role

Measurement owns method; budget owner authorises exposure and subsequent allocation; Finance reconciles the economic outcome.

systems required

Existing channel/CRM experiment capability or an appropriate specialist design, first-party outcome data and T3 register.

guardrails

Customer treatment, strategic floors, essential coverage, cash, test collisions and protected commitments.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	A predeclared holdout, suppression or spend-level contrast on the selected activity.	
workflow	1. Specify the investment decision. 2. Assess power/identification and interference. 3. Register protocol, limits and readout. 4. Verify assignment. 5. Run without uncontrolled changes. 6. Mature outcomes. 7. Review effect, cost and uncertainty. 8. Decide and retain the record.	
ai role	Optional assist Optional protocol completeness or signed-readout drafting; cannot choose significance or calculate authoritative effects.	
automation role	Assignment, integrity checks, cost joins and validated statistical analysis.	
agent role	None for methodological authority or budget execution.	
failure modes	Repeated peeking, only analysing converters, platform outcomes replacing business outcomes, and extrapolating one lift factor everywhere.	

04 Measure and decide

measurement	Use a scoped estimand, intention-to-treat where appropriate, effect interval and total net contribution on the declared horizon.
primary commercial metric	Estimated incremental contribution net of media, testing and additional operating costs.
leading indicators	Assignment integrity, enrolment, contamination, delivery contrast and outcome completeness; not interim success claims.
experiment	This Play is the experiment. Select randomised individual/account/geo design where valid; document assumptions for quasi-experimental alternatives.

📊 scale when

Apply results only to comparable tranches/populations; expand within uncertainty and revalidate after material changes.

⛔ stop / reassess when

Stop or suspend for harm, invalid assignment or irreparable contamination. At the planned readout, declare inconclusive rather than inventing precision.

05 Learn and progress

learning	Store full protocol, nulls, deviations, effect interval, cost, applicability and the actual budget decision.
----------	--

practical tool

T3 experiment and measurement plan; T2 tranche decision.

T3 Decision experiment and evidence record · T2 Economics and benefits ledger · K01 CAC and tranche comparison

→| next action

ask the method owner whether the smallest useful effect is detectable in time.

Open T3 Decision experiment and evidence record

improves

[P03 Acquire customers with useful downstream value](#) (p. 12) — Check acquisition incrementality before a material scaling claim. When: The decision concerns acquisition and causal effect remains uncertain.

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 15).

Reusable holdout infrastructure, portfolio test coordination or calibrated aggregate models when volume and decisions justify them.

evidence for this play

2 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C13](#) Attribution estimates causality (p. 43)

[C14](#) Experiments inform material choices (p. 43)

Learn which proposition and creative concept works

The team produces variants without learning which customer benefit, proof or concept changes valuable response.

decision

Which proposition or concept should inform the next approved brief?

readiness

Basic with test capacity

01 Fit

✓ when to use this play

A material proposition uncertainty exists and available reach can support a useful concept comparison.

✗ when not to use it

The product promise is unsupported, legal/brand review is unavailable, or variant volume exceeds learning capacity.

why it should work

A distinct proposition or proof can remove a customer barrier; structured testing separates the idea from production volume.

basic version

Two approved concepts and one test/readout; manual taxonomy suffices.

02 Prepare

◇ required maturity

Basic with approved claims and a method owner. Ready with one meaningful contrast and enough evidence capacity. Not ready for automated feature-based causal rules.

Check readiness for P05 (D02)

inputs

Customer need, objection, substantiation, brand assets, asset rights, audience, exposure context, baseline and downstream economics.

audience or customer

The intended eligible market or customer cohort, with consistent treatment definitions.

human role

Creative owns concept and quality; Brand approves claims and distinctiveness; measurement owns comparison; commercial owner funds the next brief.

systems required

Existing asset store, production tools, channel delivery and an experiment/evidence record.

guardrails

Rights, accessibility, truthful substantiation, trust, brand coherence and variant maintenance burden.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	One substantive proposition/concept contrast; isolate execution variations where practical.	
workflow	1. Identify need and barrier. 2. Form a mechanism-based hypothesis. 3. Approve concept and proof. 4. Produce a small test set. 5. Check rights/claims. 6. Test with an appropriate design. 7. Review valuable response and cost. 8. Update the brief.	
ai role	Optional assist Optional grounded variant drafting, tagging and synthesis. Pilot annotation only after a manual/native baseline; no automatic publication.	
automation role	Asset IDs, versions, format/expiry checks, delivery records and test logging.	
agent role	None by default; draft generation and tagging are bounded tasks.	
failure modes	⚠ CTR treated as profit ⚠ platform selection confounded with creative effect ⚠ micro-variants replacing a real proposition test.	

04 Measure and decide

measurement	Compare valuable downstream response under a valid delivery design; account for audience allocation, production cost and delayed contribution.
primary commercial metric	Incremental contribution net of production and distribution costs, or accepted-asset cost for a production-only comparison.
leading indicators	Approved asset yield, factual/brand defects, exposure balance and verified qualified response.
experiment	Randomised concept allocation where feasible; observational feature associations generate hypotheses only.

⬆ scale when

Use the concept in a comparable context when evidence supports value; replicate material claims before broad generalisation.

⛔ stop / reassess when

Stop unsupported claims immediately; stop variant proliferation or investment when evidence remains unusable or economics fail.

05 Learn and progress

learning	Retain concept, customer mechanism, audience, delivery context, result and negative findings; update the next brief.
practical tool	T1 proposition fields, T3 creative experiment view and Prompt Q04. T3 Decision experiment and evidence record · T4 Action authority and operating contract · T1 Intervention and investment card

→| **next action**

choose one customer objection whose resolution could change valuable behaviour.
Open T3 Decision experiment and evidence record

06 **Optional depth**

Advanced version

Prerequisites: see Required maturity (p. 18).
Multimodal annotation or larger test programmes only when accepted-work savings and valid learning exceed additional cost.

evidence for this play

3 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

- [C22](#) Creative features cause performance differences (p. 44)
- [C23](#) Generative production can reduce accepted-work cost (p. 44)
- [C29](#) Creative Intelligence build now (p. 44)

Improve the first value experience

New customers complete acquisition but fail to experience useful product value, weakening retained contribution.

decision

Which product repair or guidance will help eligible customers reach first value?

readiness

Basic

01 Fit

✓ when to use this play

A verified onboarding or setup barrier affects a material cohort and a useful intervention is available.

⊗ when not to use it

The proposed activation event is merely an administrative click, or the product cannot deliver the promised benefit.

why it should work

Removing friction or helping customers complete a useful task can improve meaningful usage and later value.

basic version

One onboarding barrier, one repair or guidance step and one cohort readout.

02 Prepare

◇ required maturity

Basic event and cohort visibility. Ready with a customer-experienced milestone and a delivery owner. Not ready if the milestone has no validated link to useful outcomes.

Check readiness for P06 (D02)

inputs

Signup/account cohort, onboarding steps, failure signals, customer feedback, meaningful value event, later usage and contribution.

audience or customer

New, not-yet-activated customers with the identified need or barrier.

human role

Product/Growth owner decides; Product delivers changes; Lifecycle and Service coordinate contact and capacity; method owner assesses outcomes.

systems required

Existing product analytics, onboarding/release process and native lifecycle/service tools.

guardrails

Product reliability, customer choice, contact limits, accessibility and support capacity.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	A specific setup repair, product default, useful guidance or coordinated service action.	
workflow	1. Define first value. 2. Check its relationship to later value without claiming causality. 3. Diagnose failure reasons. 4. Choose repair/guidance and comparator. 5. Check eligibility. 6. Deliver. 7. Read activation and later outcomes together.	
ai role	Optional assist Optional feedback synthesis and approved guidance drafts with human validation.	
automation role	State assignment, approved triggers, suppression, event validation and cohort tracking.	
agent role	None needed for a known onboarding path.	
failure modes	⚠ More reminders mask poor product ⚠ administrative activation improves without value ⚠ short windows hide later churn.	

04 Measure and decide

measurement	Use assigned eligible cohorts, first-value timing and later contribution; track support and unwanted-contact effects.
primary commercial metric	Incremental cohort contribution over the agreed follow-up horizon net of intervention and support cost.
leading indicators	First-value rate/time, setup errors, useful usage and successful service resolution.
experiment	Randomise uncertain onboarding alternatives where feasible; stage obvious defect fixes and qualify attribution of outcomes.

⬆ scale when

Expand after meaningful activation and downstream quality are consistent with a positive economic case in the next cohort.

⊖ stop / reassess when

Stop for customer harm, support overload, artificial milestone gaming or negative downstream quality.

05 Learn and progress

learning	Record barrier, intervention, value event, downstream relationship and the populations for which it applies.
practical tool	T1 intervention canvas and T3 activation readout. T1 Intervention and investment card · T3 Decision experiment and evidence record · T4 Action authority and operating contract

→| **next action**

observe where a recent customer failed to experience the promised value.

Open T1 Intervention and investment card

curated next play

[P12 Replicate useful work and retire operating debt](#) (p. 39) — Mature evidence, support capacity and an old-work retirement plan exist.

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 21).

Needs-based paths and tested treatment selection with adequate volume; no requirement for real-time individual optimisation.

evidence for this play

1 claim record qualifies this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C19](#) Activation means customer experienced value (p. 43)

P06 · item 1.0.0 · CONTENT-RC1 1.0.2 · Source: 03-Play-Library.md SP06 Improve the first value experience · Review 6-monthly · Edition 1 · [Contents](#) (p. 3)

Prevent profitable addressable churn

Customers leave for potentially fixable reasons, while blanket offers subsidise customers whose behaviour would not change.

decision

Who should receive which useful intervention, including no treatment?

readiness

Basic; uplift Advanced

01 Fit

✓ when to use this play

A meaningful at-risk cohort has an addressable cause and an available, legitimate treatment.

⊘ when not to use it

The cause cannot be changed, required service must not be withheld, or an incentive merely conceals a persistent product failure.

why it should work

A suitable repair or treatment may change retention enough to cover its full cost; no treatment can be the best choice.

basic version

One meaningful cohort, a simple approved rule and proportionate comparator.

02 Prepare

⚡ required maturity

Basic eligibility and treatment comparison. Ready with identity, cause, permission, outcome history and delivery capacity. Not ready for uplift modelling without adequate treatment evidence.

[P01 Establish decision-specific customer economics](#) (p. 6) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.

Check readiness for P07 (D02)

inputs

Account state, churn definition, cause evidence, contribution horizon, service/offer history, eligibility, contact policy, treatments and costs.

audience or customer

Eligible accounts with an addressable need; assignment respects account relationships and contact boundaries.

human role

Lifecycle or Customer owner decides; Service/Product delivers; Finance values contribution; measurement approves inference and Pricing approves offers.

systems required

Existing CRM/service and billing records, approved treatments and an outcome comparison.

guardrails

Complaints, fair offers, essential service, contact limits, margin and operational load.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	Service recovery, product repair, guidance or an approved offer selected for the cause.	
workflow	1. Verify risk and cause. 2. Separate mandatory service from optional treatment. 3. Compare alternatives and no action. 4. Approve economics and policy. 5. Assign eligible accounts. 6. Deliver and log. 7. Mature outcomes. 8. Review net treatment value and revise.	
ai role	Optional assist Optional summarisation of permitted service evidence; predictive risk remains distinct from causal treatability.	
automation role	Eligibility, current consent, contact caps, assignment, approved CRM delivery and cost/outcome joins.	
agent role	None required; no autonomous invented discounts or pricing.	
failure modes	⚠ Risk mistaken for preventability ⚠ whole customer LTV booked as saved ⚠ discount leakage ⚠ extrapolated effect valued at pilot cost.	

04 Measure and decide

measurement	Compare contribution per assigned eligible account over a sufficient horizon; include treatment costs for everyone treated and delayed churn.
primary commercial metric	Incremental retained contribution net of all extra treatment, service and system costs.
leading indicators	Cause resolution, delivery success, appropriate engagement and early service recovery; none substitutes for mature retention.
experiment	Account-level optional-treatment comparison where legitimate; never withhold required service. Preserve treatment/control denominators and cost scope.

⬆ scale when

Expand only where net effect and uncertainty justify the next treatment tranche and the cause remains comparable.

⬇ stop / reassess when

Stop on harm, negative economics, invalid measurement or unresolved service failure; route mandatory repair to its owner.

05 Learn and progress

learning	Cause-by-treatment evidence, no-action performance, total cost, effect interval, customer consequences and expiry triggers.
practical tool	T2 retention economics, T3 measurement plan and T4 contact contract. T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T4 Action authority and operating contract · K02 Net intervention value

→| next action

identify one preventable churn cause and a non-discount repair.

Open T2 Economics and benefits ledger

curated next play

[P12 Replicate useful work and retire operating debt](#) (p. 39) — Mature evidence, support capacity and an old-work retirement plan exist.

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 24).

Validated heterogeneous treatment models and bounded selection among proven treatments; test benefit over cohort rules.

evidence for this play

4 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C09](#) Observed, predicted and incremental customer value (p. 42)

[C11](#) Individual uplift and treatment optimisation (p. 43)

[C20](#) Churn risk identifies preventable churn (p. 43)

[C21](#) Offers, suppression and no contact (p. 44)

play · p08

growth · expansion, usage, win-back and referral · editorial rank 10 of 12

Grow relevant customer and account value

Relevant customer needs remain unmet, or expansion activity increases transactions without net account contribution.

decision

Which relevant next proposition or action increases net account contribution while meeting a genuine customer need?

readiness

Basic

01 Fit

✓ when to use this play

Evidence identifies a useful complementary product, capacity need, usage opportunity, addressable win-back cause or satisfied referral cohort.

⊘ when not to use it

Product fit is weak, supply is constrained, customer benefit is unclear or rewards mainly subsidise existing behaviour.

why it should work

A relevant intervention can create additional useful usage or relationships, net of substitution and delivery costs.

basic version

One needs-based cohort and a human-approved relevant intervention using existing systems.

02 Prepare

◇ required maturity

Basic account-level economics and eligibility. Ready with a specific need and treatment. Not ready if product interactions or account assignment cannot be understood.

[P01 Establish decision-specific customer economics](#) (p. 6) — Adequate decision-specific economics is required; the whole P01 Play is unnecessary if already satisfied.

Check readiness for P08 (D02)

inputs

Need/state, product holdings, usage, satisfaction, available capacity, eligibility, contribution, cannibalisation, reward and service costs.

audience or customer

Eligible existing accounts; lapsed accounts with addressable causes; satisfied advocates where referral is the selected variant.

human role

Commercial/Product owner decides; Sales or Lifecycle executes; Service confirms capacity; Finance and method partners review value.

systems required

Existing CRM, product/commerce, account and service systems; approved offer and workflow records.

guardrails

Suitability, trust, stock/capacity, contact policy, offer fairness, fraud and future churn.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	One variant: useful usage guidance, suitable cross-sell/upsell, cause-specific win-back or a controlled referral offer.	
workflow	1. Confirm customer need. 2. Choose one variant. 3. Calculate account-wide economics. 4. Approve eligibility and terms. 5. Assign treatment/comparator. 6. Deliver through native tools or human selling. 7. Assess substitution, retention and contribution. 8. Decide.	
ai role	Optional assist Optional verified account research, needs synthesis and approved sales-preparation drafts; no autonomous outreach volume target.	
automation role	Eligibility, account-level assignment, contact suppression, approved delivery, fraud flags and outcome joins.	
agent role	None by default; novel dynamic research requires its own P10 (p. 33) comparison.	
failure modes	⚠ Affinity mistaken for incremental response ⚠ existing demand shifted between products ⚠ referral codes treated as causality.	

04 Measure and decide

measurement	Account-wide assigned-population contribution, including switching, displaced purchases, repeat churn, rewards and added support.
primary commercial metric	Incremental account contribution after all additional acquisition, offer, delivery and operating costs.
leading indicators	Useful adoption, qualified conversation, customer fit, fulfilment and relevant usage; avoid reward submissions as success.
experiment	Account-level holdout for suitable optional treatments; lower-volume B2B uses a qualified design and longer horizon, without false precision.

⬆ scale when

Repeat only when the need and total account economics remain valid in the next cohort and delivery can absorb demand.

⛔ stop / reassess when

Stop if cannibalisation, complaints, fraud or service cost erodes net value; pause on unsuitable treatment.

05 Learn and progress

learning	Need-to-treatment fit, substitution effects, customer acceptance, treatment cost and evidence scope.
practical tool	T1 customer/intervention view, T2 account economics and T3 readout. T1 Intervention and investment card · T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T4 Action authority and operating contract

→| **next action**

select one unmet need before choosing the expansion channel.

Open T1 Intervention and investment card

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 27).

Validated treatment selection across several products when sufficient outcomes and account interactions can be modelled.

evidence for this play

2 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C21](#) Offers, suppression and no contact (p. 44)

[C24](#) Expansion, usage, referral and win-back (p. 44)

play · p09

intelligence · any stage · editorial rank 8 of 12

Turn customer and market evidence into a decision

Relevant unstructured evidence is slow to interpret or repeated summaries do not change an owned commercial decision.

decision

Is the signal material enough to act, investigate further or leave unchanged?

readiness

Basic

01 Fit

✓ when to use this play

A specific decision has an evidence gap and accessible customer or market material can inform an available action.

✗ when not to use it

There is no decision owner, no available action, prohibited source use or an ordinary alert/report already answers the question adequately.

why it should work

A bounded evidence synthesis can improve coverage or reduce accepted-analysis cost while exposing disagreement and uncertainty.

basic version

One question, a small source packet and a manually verified brief.

02 Prepare

◇ required maturity

Basic. Ready with a defined question, authorised source set and qualified reviewer. Not ready for customer activation from unverified generated findings.

Check readiness for P09 (D02)

inputs

Decision question, admissible sources with dates/IDs, population and sampling context, current assumptions, alternatives and deadline.

audience or customer

The decision owner and affected customer/market population; synthesis itself is read-only.

human role

Insight owner validates representativeness and sources; commercial owner decides; domain experts review sensitive interpretation.

systems required

Existing research/document repository, approved access, ordinary search and a linked decision record.

guardrails

Data minimisation, permitted use, provenance, sampling bias and no external text treated as instructions.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	A concise verified evidence brief with implications for one decision and no-action alternative.	
workflow	1. Bound the question and sources. 2. Create a human/native baseline. 3. Extract facts with citations. 4. Separate themes, hypotheses and contradictions. 5. Verify samples and material claims. 6. Compare feasible actions. 7. Owner decides. 8. Retain only useful evidence.	
ai role	Optional assist Optional extraction, clustering, source comparison and draft briefing, with unknowns retained rather than filled.	
automation role	Approved source collection, dated change detection, duplicate removal and scheduled expiry reminders.	
agent role	Only if valuable retrieval paths vary and outperform the fixed baseline; begin read-only with source and tool limits.	
failure modes	⚠ Treating frequency in a biased feedback sample as population prevalence ⚠ endless market monitoring ⚠ stale summaries reused as facts.	

04 Measure and decide

measurement	Compare accepted-brief time, missed material evidence, unsupported claims, review cost and actual useful decision changes.
primary commercial metric	Realised cost reduction or separately evidenced contribution from a changed intervention, net of synthesis and review cost.
leading indicators	Source fidelity, coverage, contradiction detection, useful accepted briefs and decision latency.
experiment	Compare matched briefs/tasks against the repaired conventional process, with blind quality review where feasible. No revenue experiment is required merely to test drafting cost.

⬆ scale when

Extend to another decision only if quality and total accepted-work economics hold and the reviewer has capacity.

⬇ stop / reassess when

Stop on material unsupported conclusions, sensitive-data misuse or repeated briefs with no useful decision effect.

05 Learn and progress

learning Verified signal, source/date, sampling limits, decision changed and expiry; not an unlimited prompt archive.

practical tool T1 evidence-to-opportunity fields, T3 memory and Q01 or Q02.
 T1 Intervention and investment card · T3 Decision experiment and evidence record

→| next action

name the decision before collecting more material.

Open T1 Intervention and investment card

improves

[P02 Remove the dominant growth constraint](#) (p. 9) — Gather relevant evidence for a contested diagnosis. When: A bounded source-synthesis task could change the decision.

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 30).

Scoped retrieval and bounded dynamic investigation if measured benefit beats fixed search/extraction; AI-discovery monitoring stays descriptive.

evidence for this play

2 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C25](#) AI search visibility produces commercial ROI (p. 44)

[C28](#) Read-only customer, market or performance assistance (p. 44)

Redesign and test one AI-assisted workflow

A recurring workflow consumes material effort, delays useful decisions or produces avoidable errors.

decision

Should this task remain human, use rules/native tools, add AI, or justify dynamic tool use?

readiness

Basic; execution Connected

01 Fit

✓ when to use this play

The work has enough volume or value, inspectable outputs and a credible conventional improvement baseline.

⊘ when not to use it

Do not add an AI comparison when stable native automation suffices, volume is too low, the output cannot be evaluated or scarce review capacity is absent. The mechanism-selection step may still conclude with human work or deterministic automation.

why it should work

Process repair removes unnecessary work; selective AI may improve unstructured steps; each additional layer must earn its cost.

basic version

One draft/synthesis step and human review, or deterministic automation when it wins.

02 Prepare

◇ required maturity

Basic for draft assistance; Connected for system execution. Ready with baseline, reviewer and allowed data. Not ready for actions without a tested authority/stop contract.

[P01 Establish decision-specific customer economics](#) (p. 6) — Only when the selected intervention depends on unresolved customer-cohort economics. For workflow cost or other non-customer economics, use the relevant T2 view; P01 is not a prerequisite.

Check readiness for P10 (D02)

inputs

Observed task samples, accepted-output standard, current process A, repaired process B, costs, errors, permissions and staff capacity; candidate AI C only if an additional comparison is justified.

audience or customer

Internal workflow users; external customers only through an independently approved intervention and execution contract.

human role

Functional owner owns work and capacity realisation; Finance checks benefit; Operations owns reliability; reviewers have authority and time.

systems required

Current workflow and approved model access if justified; no custom orchestration required for a fixed task.

guardrails

Data access, grounded output, exact authority, no model arithmetic, workload limits, manual fallback and independent stop.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	One redesigned workflow. Retain a sufficient human or deterministic mechanism; add a bounded comparison of B with C only when justified. Keep consequential authority unchanged during initial evaluation.	
workflow	1. Observe tasks. 2. Remove redundant steps. 3. Establish B. 4. If B is sufficient, record the mechanism decision and move to adoption and retirement; otherwise define one justified AI step and evaluation. 5. Compare accepted quality/time/cost. 6. Test edge and failure cases. 7. Decide. 8. Retire replaced work only after reliable adoption.	
ai role	Workflow under test A specified interpretation or production step whose output a human can verify; no open-ended commercial goal.	
automation role	Stable routing, arithmetic, checks, state, logs and exact approved actions.	
agent role	Optional only when dynamic tool selection beats the fixed process; one candidate with bounded tools, data, time and cost.	
failure modes	⚡ Comparing AI with broken A only ⚡ counting draft speed instead of accepted work ⚡ savings not realised ⚡ duplicate processes never retired.	

04 Measure and decide

measurement	Separate B–A, C–B and any later D–C; include rework, rejected outputs, review, integration, support and incidents.
primary commercial metric	Incremental realised operating savings or useful contribution net of full added cost; capacity reported separately.
leading indicators	Accepted-work yield, end-to-end time, error by risk slice, review minutes and queue age.
experiment	Matched or randomised comparable tasks with blinded quality review where feasible; production actions need offline, shadow and capped canary evidence.

⏏ scale when

Retain or adopt a sufficient conventional improvement after its quality, cost and realisation checks. Adopt an AI addition only if C beats B on the declared quality/cost standard and a benefit owner can realise value; expand authority through a separate gate.

⏏ stop / reassess when

Stop or fall back for unacceptable error, policy breach, review overload, no additional benefit or no maintainable owner.

05 Learn and progress

learning Task boundary, mechanism, evaluation slices, accepted-work economics, failure cases, version and realisation decision.

practical tool T4 work design/agent card, T2 benefits and T5 retirement.
T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T4 Action authority and operating contract · T5 Delivery and retirement plan · K02 Net intervention value

→ next action

sample the full workflow including review and correction.

Open T2 Economics and benefits ledger

curated next play

[P12 Replicate useful work and retire operating debt](#) (p. 39) — Mature evidence, support capacity and an old-work retirement plan exist.

06 Optional depth**Advanced version**

Prerequisites: see Required maturity (p. 33).

Bounded dynamic investigation after baseline superiority; autonomy requires a separate same-action delay/review-value comparison.

evidence for this play

5 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C06](#) Separate process, AI and coordination gains (p. 42)

[C07](#) Hours saved become financial savings (p. 42)

[C23](#) Generative production can reduce accepted-work cost (p. 44)

[C26](#) SQL, rules and native execution first (p. 44)

[C28](#) Read-only customer, market or performance assistance (p. 44)

P10 · item 1.0.1 · CONTENT-RC1 1.0.2 · Source: 03-Play-Library.md SP10 Redesign and test one AI-assisted workflow · Review 6-monthly · Edition 1 · [Contents](#) (p. 3)

play · p11

operating model · portfolio and operating decisions · editorial rank 11 of 12

Run an accountable investment and decision review

Repeated recommendations do not become actions, or teams optimise incompatible objectives while money and capacity remain fixed.

decision

Which feasible tranche or intervention should be funded, held, changed or stopped?

readiness

Actual authority required

01 Fit

✓ when to use this play

There are material recurring choices and leaders can change at least one relevant budget, resource or execution decision.

⊘ when not to use it

A new meeting duplicates existing authority, opportunities have incomparable unsupported values, or no owner can move resources.

why it should work

A named decision forum with common economics and real rights can resolve trade-offs and remove repeated handoff delays.

basic version

One weekly or monthly decision inside an existing meeting, with one final accountable owner.

02 Prepare

◇ required maturity

Basic for decision rights; Connected for cross-team tranches. Ready with an actual decision, owner and capacity. Not ready for mathematical optimisation without comparable evidence.

P01 Establish decision-specific customer economics (p. 6) — Only when the selected intervention depends on unresolved customer-cohort economics. For workflow cost or other non-customer economics, use the relevant T2 view; P01 is not a prerequisite. Check readiness for P11 (D02)

inputs

Decision inventory, eligible opportunity cards, economic ranges, commitments, budget rights, staff availability, prior actions and outcome readouts.

audience or customer

Outcome owners and budget/delivery partners; customers affected by the selected intervention remain governed by its Play.

human role

Commercial budget owner decides; Finance approves required transfers; Product/Service and function owners commit actual capacity; method owner challenges effect comparability.

systems required

Existing planning, Finance and work-tracking tools with T1–T4 linked to the decision.

guardrails

Strategic floors, brand/future demand, cash, contracts, test integrity, craft quality and customer-contact/capacity conflicts.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	Replace one reporting forum with a short decision review and explicit authority/closure record.	
workflow	1. Select the recurring decision. 2. Agree metric and rights. 3. Show constraints and alternatives. 4. Challenge evidence.	5. Record the owner's choice. 6. Execute a real action. 7. Track closure and mature outcome. 8. Review whether the forum earns its cost.
ai role	Optional assist Optional briefing from approved records and scenario explanation; no independent allocation or invented comparable returns.	
automation role	Certified report refresh, action reminders, budget checks and versioned decision records.	
agent role	None for portfolio authority; optional evidence preparation only after P10 (p. 33) validation.	
failure modes	- Owner without authority - central ticket queue - noise-driven reallocation - strategic investment judged on immediate clicks.	

04 Measure and decide

measurement	Track actual decisions and resource changes, total review cost, execution latency and subsequent intervention outcomes without summing overlapping benefits.
primary commercial metric	Portfolio contribution change net of coordination and transition cost, qualified when causal separation is infeasible.
leading indicators	Action closure, authorised transfers, queue age, decision recurrence and retired reporting hours.
experiment	Pilot the rights/forum change on one decision; compare prior or parallel workflow carefully. Do not claim a clean causal organisation effect from a simple before/after.

⬆ scale when

Broaden only when repeated decisions improve, authority works and net coordination benefit exceeds added overhead.

⬇ stop / reassess when

Stop the extra forum if it adds reporting without executable decisions; keep necessary financial and customer controls.

05 Learn and progress

learning	Decision, alternatives, dissent, budget/capacity reality, outcome, assumption changes and the next review date.
practical tool	T4 decision rights, T2 tranche view and T3 review record. T1 Intervention and investment card · T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T4 Action authority and operating contract · K02 Net intervention value

→| next action

execute one small authorised decision and record the blockers encountered.

Open T1 Intervention and investment card

06 Optional depth

Advanced version
Prerequisites: see Required maturity (p. 36).
Cross-functional scenario services and persistent outcome teams only after recurring workload and comparative economics justify them.

evidence for this play

2 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C12](#) Precise next-dollar optimisation (p. 43)

[C46](#) One owner and genuine resource authority (p. 45)

Replicate useful work and retire operating debt

Useful pilots remain isolated while old reports, processes and tools continue consuming capacity and cost.

decision

Repeat, adapt, maintain, simplify or retire the workflow and its predecessor?

readiness

Proven workflow first

01 Fit

✓ when to use this play

A workflow has credible value and reliable operation, with another justified user or an obsolete predecessor to retire.

⊘ when not to use it

The result is immature, economics fail against the best alternative, or no owner can support the second context.

why it should work

Controlled replication reuses proven work; deliberate retirement realises savings and limits operating complexity.

basic version

One second user or population, explicit support and closure of one obsolete report/handoff/tool.

02 Prepare

◆ required maturity

Basic proof and a funded owner; Connected for shared services. Ready with transfer assumptions and a fallback. Not ready merely because a pilot demo succeeded.

Check readiness for P12 (D02)

inputs

Signed readout, costs, source/target population differences, workflow version, control tests, support roster, old-work inventory and export/exit needs.

audience or customer

The next team or eligible population and the people responsible for ongoing operation.

human role

Business owner owns value and acceptance; Operations owns transition and fallback; Finance verifies expense action; functional managers release capacity.

systems required

Existing workflow, documentation, access and work-tracking tools; shared service only with funded recurring users.

guardrails

Continuity, recoverability, preserved records, lawful retention, absence cover and no forced transfer of invalid evidence.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	One bounded replication and a dated retirement of genuinely replaced work.	
workflow	1. Review proof and transfer limits. 2. Price replication and ongoing support. 3. Assign owner/cover. 4. Train through actual work. 5. Run a capped release. 6. Verify quality and economics. 7. Retire the predecessor safely. 8. Review continued use and cost.	
ai role	Optional assist Optional documentation and training drafts grounded in the approved workflow; no evidence promotion or deletion authority.	
automation role	Version distribution, monitoring, access revocation, archive/export checks and review reminders.	
agent role	No new agent required for replication; inherited agent permissions are re-evaluated for the target context.	
failure modes	⚠ Scaling before outcomes mature ⚠ permanent dual run ⚠ new titles without workload ⚠ treating training attendance as competence.	

04 Measure and decide

measurement	Compare target-context quality, outcomes, cost and adoption; verify old expense/process closure rather than counting deployment alone.
primary commercial metric	Net realised value after replication, support, transition and retirement cost, with no duplicate benefit booking.
leading indicators	Useful active use, task competence, incident/review load, completed retirement and reduced duplicate work.
experiment	Small target-context comparison or staged rollout appropriate to risk; rehearse fallback and verify replacement before ending dual run.

⬆ scale when

Repeat again only when transferability and economics hold and service ownership can support the next unit.

⬇ stop / reassess when

Revert or retire on failed transfer, unowned maintenance, native replacement superiority, low useful demand or negative ongoing value.

05 Learn and progress

learning	Record adaptation, local validation, support cost, benefits actually realised, decommissioning and reasons for retirement.
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practical tool

T5 delivery and retirement plan with T2 realisation ledger.

T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T5 Delivery and retirement plan

→| **next action**

identify exactly what old work ends if the new workflow is adopted.

Open T2 Economics and benefits ledger

06 Optional depth

Advanced version

Prerequisites: see Required maturity (p. 39).

Reusable platform services, persistent teams or dedicated roles only when recurring demand and net coordination value justify them.

evidence for this play

1 claim record qualifies this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 42).

[C49](#) Retire old work and fund maintenance (p. 45)

P12 · item 1.0.0 · CONTENT-RC1 1.0.2 · Source: 03-Play-Library.md SP12 Replicate useful work and retire operating debt
 · Review 6-monthly · Edition 1 · [Contents](#) (p. 3)

Claim ledger

24 claim records qualify the records in this edition. Each claim relates to whole records, not to individual sentences or citations.

Claim classifications

Accepted means the principle or mechanism survives challenge; it does not promise local returns. Accepted with conditions states prerequisites. Qualified narrows a former claim. Advanced requires substantial readiness. Experimental requires a capped comparison. Unresolved means the evidence cannot settle the claim. Rejected excludes a recommendation from the product.

Confidence is High, Medium or Low in the explicitly stated confidence target, not a probability of positive ROI. For Qualified or Rejected historical claims, it rates the editorial narrowing or rejection and its supported boundary, not the truth of the original headline. Preserve the historical headline and treatment together. Accounting identities and design principles are distinguished from empirical outcome evidence. Framework destinations use the final chapter, play and toolkit IDs.

C01

Accepted

confidence: High

Contribution and cash govern investment

confidence target	Contribution and cash govern investment
qualification	Value revenue through relevant costs and a declared horizon; no guaranteed return.
evidence level	Economic identity
source	STR §17; GRW §§1–7; RT §§12–18
destination	CH02 · P01 (p. 6) · T2

C02

Accepted

confidence: High

Repair the binding growth constraint

confidence target	Repair the binding growth constraint
qualification	Product, proposition, service and capacity compete with media changes.
evidence level	Commercial mechanism
source	STR §§10,13–15; GRW §§8,26–36; RT §§5,66
destination	CH04 · P02 (p. 9)

C06

Accepted

confidence: High

Separate process, AI and coordination gains

confidence target	Separate process, AI and coordination gains
qualification	Compare current practice A, repaired conventional B, B plus AI C, and added integration D.
evidence level	Comparative investment logic
source	GRW opening falsification; RT §§9,15
destination	CH02 · P10 (p. 33) · T2

C07

Qualified

confidence: High

Hours saved become financial savings — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Capacity stays separate until expenditure disappears or useful redeployment is observed.
qualification	Capacity stays separate until expenditure disappears or useful redeployment is observed.
evidence level	Accounting distinction
source	OS §14; OPS §§21,43; RT §14
destination	CH02 · P10 (p. 33) · T2

C09

Accepted

confidence: High

Observed, predicted and incremental customer value

confidence target	Observed, predicted and incremental customer value
qualification	Observed cohort value is the starting point; prediction does not establish treatment effect.
evidence level	Measurement distinction
source	STR §17; GRW §§4–5,17–18; RT §18
destination	CH02 · P07 (p. 24) · P03 (p. 12)

C10

Advanced

confidence: Medium

Individual predicted cLTV for acquisition

confidence target	Individual predicted cLTV for acquisition
qualification	Temporal validation, reliable contribution and improved prospective decisions required.
evidence level	Established method, local utility unknown
source	GRW §§5,7,17; SYS §8; RT §§18,24
destination	CH08 · P03 (p. 12)

C11 Advanced confidence: Medium

Individual uplift and treatment optimisation

confidence target	Individual uplift and treatment optimisation
qualification	Treatment variation, adequate outcomes and prospective benefit; cohort rules are valid end states.
evidence level	Causal method with demanding data
source	GRW §§18,30–31; RT §§18,67,69
destination	CH08 · P07 (p. 24)

C12 Qualified confidence: High

Precise next-dollar optimisation — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Use the next feasible investment tranche, ranges, real budget rights and protected commitments.
qualification	Use the next feasible investment tranche, ranges, real budget rights and protected commitments.
evidence level	Economic principle, uncertain estimates
source	STR §18; GRW §§49–51; RT §§19,23
destination	CH05 · P11 (p. 36) · T2

C13 Rejected confidence: High

Attribution estimates causality — excluded

confidence target	Editorial rejected of the historical claim. Supported boundary: Attribution assigns credit; causal claims need a defensible design and assumptions.
qualification	Attribution assigns credit; causal claims need a defensible design and assumptions.
evidence level	Contradicted by identification limits
source	RES §§2,5; GRW §§42–45; RT §20
destination	P04 (p. 15) · CH07

C14 Accepted with conditions confidence: High

Experiments inform material choices

confidence target	Experiments inform material choices
qualification	Check power, interference, delay and value of information before exposure.
evidence level	Established method; feasibility conditional
source	STR §22; GRW §§37–43; RT §§21–22
destination	T3 · P04 (p. 15) · CH07

C15 Qualified confidence: High

Every decision should be experimentally validated — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Repair obvious defects; use qualified observation or judgement when testing cannot inform the choice.
qualification	Repair obvious defects; use qualified observation or judgement when testing cannot inform the choice.
evidence level	Proportionality
source	OS §17; RT §§21–22
destination	P02 (p. 9) · CH07

C18 Accepted with conditions confidence: High

Customer quality and native value signals

confidence target	Customer quality and native value signals
qualification	Native functionality is an option, not a proven local uplift; use verified cohort signals.
evidence level	Economic mechanism and documented capability
source	STR §§12,16; GRW §§7,10,17; RT §24
destination	P03 (p. 12)

C19 Accepted confidence: High

Activation means customer experienced value

confidence target	Activation means customer experienced value
qualification	Validate leading milestone against retained value; do not label the association causal.
evidence level	Commercial mechanism
source	STR §13; GRW §28
destination	CH06 · P06 (p. 21)

C20 Qualified confidence: High

Churn risk identifies preventable churn — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Identify addressable causes and compare repair, education, offer and no treatment.
qualification	Identify addressable causes and compare repair, education, offer and no treatment.
evidence level	Prediction versus intervention
source	STR §14; GRW §§18,31; RT §18
destination	P07 (p. 24)

C21

Accepted with conditions

confidence: High

Offers, suppression and no contact

confidence target	Offers, suppression and no contact
qualification	Mandatory eligibility checks are not experimental; economic suppression may be tested lawfully.
evidence level	Treatment economics
source	GRW §§19,21,30–36; RT §24
destination	T4 · P07 (p. 24) · P08 (p. 27)

C22

Qualified

confidence: High

Creative features cause performance differences — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Tags generate hypotheses; controlled concept tests assess effects.
qualification	Tags generate hypotheses; controlled concept tests assess effects.
evidence level	Confounded delivery and provider evidence
source	GRW §§22–25; RT §§24,50
destination	P05 (p. 18)

C23

Accepted with conditions

confidence: Medium

Generative production can reduce accepted-work cost

confidence target	Generative production can reduce accepted-work cost
qualification	Include review, rework, rights, quality and actual expense realisation.
evidence level	Scoped task and company evidence
source	OS §§6,11; OPS §17; RT §§14,50
destination	P10 (p. 33) · P05 (p. 18)

C24

Accepted with conditions

confidence: High

Expansion, usage, referral and win-back

confidence target	Expansion, usage, referral and win-back
qualification	Use customer need and net account contribution; account for cannibalisation, fraud and repeat churn.
evidence level	Commercial mechanisms
source	STR §15; GRW §§32–36
destination	P08 (p. 27)

C25

Unresolved

confidence: Low

AI search visibility produces commercial ROI

confidence target	AI search visibility produces commercial ROI
qualification	Monitor dated observations only; no standalone GEO return claim.
evidence level	Descriptive monitoring; no general counterfactual
source	GRW §14; RT §§53–54
destination	CH12 · P09 (p. 30)

C26

Accepted

confidence: High

SQL, rules and native execution first

confidence target	SQL, rules and native execution first
qualification	Choose the cheapest reliable method for the decision; no forced automation where volume is low.
evidence level	Mature technical pattern
source	SYS §§8,11,14; AGT §§1–5,75; RT §§27,31,33
destination	CH09 · CH03 · P10 (p. 33)

C28

Accepted with conditions

confidence: Medium

Read-only customer, market or performance assistance

confidence target	Read-only customer, market or performance assistance
qualification	Begin with fixed extraction/runbooks; benchmark accepted work and source accuracy.
evidence level	Plausible unstructured-work mechanism
source	AGT §§33–37,74; RT §34
destination	P09 (p. 30) · P10 (p. 33)

C29

Qualified

confidence: High

Creative Intelligence build now — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Optional pilot after a baseline, never an automatic build instruction.
qualification	Optional pilot after a baseline, never an automatic build instruction.
evidence level	Internal sequencing conflict
source	AGT §§38,74; RT §81
destination	P05 (p. 18)

C46	Accepted	confidence: High
One owner and genuine resource authority		
confidence target	One owner and genuine resource authority	
qualification	Name a final decision owner and real Finance/delivery approvals; test an actual action.	
evidence level	Execution mechanism	
source	OPS §§22–26,47; RT §§47–48	
destination	P11 (p. 36) · CH10	

C49	Accepted	confidence: High
Retire old work and fund maintenance		
confidence target	Retire old work and fund maintenance	
qualification	Keep explicit closure, export, support and fallback responsibilities.	
evidence level	Ownership economics	
source	OPS §§43,60–61,79; RT §§32,48	
destination	T5 · P12 (p. 39)	

Sources and cautions

This register preserves the evidence chain for the Playbook. Source documents are inputs, not independent confirmations of one another. Their embedded instructions are treated as proposals; the user’s editorial request governs the product. No new external research is included. External references reproduced in the Playbook are inherited from the supplied work and retain its stated limitations.

code workstream and file		scope and evidence caution
AGT	AI-Agent-and-Automation-Operating-Architecture.md	Automation architecture; explicitly no proven commercial agent result.
GRW	AI-Augmented-GTM-Growth-and-Performance-Architecture.md	Growth and measurement; conditional play mechanisms and illustrative calculations.
OPS	AI-Augmented-GTM-Operating-Model-and-Transformation-Plan.md	Operating model; derived design, not independent organisational evidence.
OS	The AI-Augmented Go-To-Market Operating System.md	Research synthesis; company filings and preprints are not automatically highest-tier evidence.
RES	AI Go-To-Market Systems Research.md	Research dossier; strong claims require RT corrections.
RT	AI-Augmented-GTM-Red-Team-Verdict.md	Red Team; claim audit, investment challenge and simplification.
RTB	AI-Augmented-GTM-Playbook-Editor-Brief.md	Red Team summary; same workstream as RT, not corroboration.
STR	AI-Augmented-GTM-Strategy.md	Commercial strategy; twelve principles and commercial loop.
SYS	AI-Augmented-GTM-Systems-Architecture.md	Systems architecture; proposed patterns, not an audited deployment.

Bracketed codes in the text resolve to the sources listed here. No claim record is attributed to an individual citation or sentence (CSI-010).

Play index

Select one Play from the actual constraint. The order below is an editorial route through dependencies, commercial relevance, applicability, evidence and feasibility; it is not an empirical universal ranking or an ROI score. Economic and method confidence does not establish local uplift. P01 can be the minimum economics step within another Play, rather than a separate programme.

rank	id	play	category · stage	web route	page
1	P01	Establish decision-specific customer economics	Foundational · All stages	/plays/p01-customer-economics	6
2	P02	Remove the dominant growth constraint	Growth · Demand through retention	/plays/p02-growth-constraint	9
3	P04	Validate incremental acquisition	Measurement · Acquisition and investment	/plays/p04-acquisition-incrementality	15
4	P06	Improve the first value experience	Growth · Activation	/plays/p06-first-value	21
5	P07	Prevent profitable addressable churn	Growth · Retention	/plays/p07-addressable-churn	24
6	P03	Acquire customers with useful downstream value	Growth · Acquisition	/plays/p03-customer-acquisition	12
7	P05	Learn which proposition and creative concept works	Growth · Demand and conversion	/plays/p05-proposition-and-creative	18
8	P09	Turn customer and market evidence into a decision	Intelligence · Any stage	/plays/p09-customer-and-market-evidence	30
9	P10	Redesign and test one AI-assisted workflow	Automation · Operating work	/plays/p10-ai-assisted-workflow	33
10	P08	Grow relevant customer and account value	Growth · Expansion, usage, win-back and referral	/plays/p08-customer-and-account-value	27
11	P11	Run an accountable investment and decision review	Operating model · Portfolio and operating decisions	/plays/p11-investment-review	36
12	P12	Replicate useful work and retire operating debt	Transformation · Implementation and scale	/plays/p12-replicate-and-retire	39

Before funding, use T1 to return Do now, Prepare, Experiment or Avoid. A safety, authority, economics or evidence veto overrides rank. No more than one AI experiment is implied by this library.

ID index and web routes

Every stable ID in this edition. IDs marked “web” are referenced here but live in the web product (interactive tools, prompts, diagnostics and records outside this edition). Routes are relative to <https://gtm.kraftdigital.co.nz>.

id	type	title	web route	page
CH02	Chapter	Customer economics	/learn/ch02-customer-economics	web
CH03	Chapter	The GTM Growth System	/learn/ch03-gtm-growth-system	web
CH04	Chapter	Diagnose the constraint and readiness	/learn/ch04-diagnose-readiness	web
CH05	Chapter	Prioritise and choose	/learn/ch05-prioritise-and-choose	web
CH06	Chapter	Execute growth interventions	/learn/ch06-growth-interventions	web
CH07	Chapter	Measure and learn	/learn/ch07-measure-and-learn	web
CH08	Chapter	Configure the system	/learn/ch08-configure-the-system	web
CH09	Chapter	AI and automation	/learn/ch09-ai-and-automation	web
CH10	Chapter	Operate with human accountability	/learn/ch10-human-accountability	web
CH12	Chapter	Reference and stewardship	/learn/ch12-reference-and-stewardship	web
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P02	Play	Remove the dominant growth constraint	/plays/p02-growth-constraint	9
P03	Play	Acquire customers with useful downstream value	/plays/p03-customer-acquisition	12
P04	Play	Validate incremental acquisition	/plays/p04-acquisition-incrementality	15
P05	Play	Learn which proposition and creative concept works	/plays/p05-proposition-and-creative	18
P06	Play	Improve the first value experience	/plays/p06-first-value	21
P07	Play	Prevent profitable addressable churn	/plays/p07-addressable-churn	24
P08	Play	Grow relevant customer and account value	/plays/p08-customer-and-account-value	27
P09	Play	Turn customer and market evidence into a decision	/plays/p09-customer-and-market-evidence	30
P10	Play	Redesign and test one AI-assisted workflow	/plays/p10-ai-assisted-workflow	33
P11	Play	Run an accountable investment and decision review	/plays/p11-investment-review	36
P12	Play	Replicate useful work and retire operating debt	/plays/p12-replicate-and-retire	39
T1	Tool	Intervention and investment card	/tools/t1-intervention-card	web
T2	Tool	Economics and benefits ledger	/tools/t2-economics-ledger	web
T3	Tool	Decision experiment and evidence record	/tools/t3-evidence-record	web
T4	Tool	Action authority and operating contract	/tools/t4-operating-contract	web
T5	Tool	Delivery and retirement plan	/tools/t5-delivery-plan	web
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C06	Evidence	Separate process, AI and coordination gains	/evidence#c06	42
C07	Evidence	Hours saved become financial savings	/evidence#c07	42
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id	type	title	web route	page
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C21	Evidence	Offers, suppression and no contact	/evidence#c21	44
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C23	Evidence	Generative production can reduce accepted-work cost	/evidence#c23	44
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C49	Evidence	Retire old work and fund maintenance	/evidence#c49	45
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Q02	Prompt	Market change to opportunity brief	/prompts/q02-market-opportunity	web
Q04	Prompt	Creative learning into an approved brief	/prompts/q04-creative-brief	web
D02	Diagnostic	Readiness for this Play	/diagnose/d02-play-readiness	web
K01	Calculator	CAC and tranche comparison	/tools/t2-economics-ledger/cac	web
K02	Calculator	Net intervention value	/tools/t2-economics-ledger/value	web