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tool · t2

Economics and benefits ledger

Value an intervention consistently and distinguish process, AI and coordination gains.

Views: [Metric and cohort worksheet](#) (p. 2) · [Tranche and customer quality comparison](#) (p. 3) · [Comparative five-year ownership view](#) (p. 4) · [Benefit realisation template](#) (p. 5)

Interpretation: A positive result versus current practice may still lose to process repair.

before you fill

Five working artefacts hold the operational record. Their specialised views are sections of the same record, not separate registers or new software requirements. Copy only the fields needed for the selected Play. Link all five with one intervention ID and record owner, version and review date. An empty field is an unresolved input, not implied approval.

when to use	Before funding, at a mature readout and before scale.	inputs	Agreed customer/cost scope, observed cohorts or scoped effects, horizon, uncertainty, actual costs and feasible alternatives.
method	Reconcile, calculate with deterministic tools, separate cash from capacity, compare incremental options and test downside assumptions.	output	Finance-reviewed economics and a benefit realisation action.
limitations	No worksheet creates a counterfactual or makes speculative LTV bankable. [GRW §§1-7, 48-51; OPS §43; RT §§12-19]		

→| next action

Fund a bounded tranche, investigate a material uncertainty, simplify or stop.

calculator views

K01 CAC and tranche comparison

K02 Net intervention value

used by

- P01 Establish decision-specific customer economics
- P03 Acquire customers with useful downstream value
- P04 Validate incremental acquisition
- P07 Prevent profitable addressable churn
- P08 Grow relevant customer and account value
- P10 Redesign and test one AI-assisted workflow
- P11 Run an accountable investment and decision review
- P12 Replicate useful work and retire operating debt

Metric and cohort worksheet

T2 · metric-and-cohort-worksheet

Metric ID / version / Finance owner:

Customer entity / cohort / currency / tax treatment:

Horizon and cohort age / data cutoff / outcome lag:

Numerator / denominator / inclusions / exclusions:

Acquisition cost scope and allocation convention:

Contribution costs already included:

Costs explicitly outside contribution:

Source records / quality and reconciliation checks:

Estimate type: observed / attributed / forecast / incremental effect

Identification method and assumptions if incremental:

Uncertainty, missing data and sensitivity:

guidance · not part of the record

calculation	formula and use
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Period contribution	Net revenue less agreed variable costs and incentives, each once
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Cohort CAC	Agreed acquisition expense / genuinely new cohort customers
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Incremental CAC	Incremental acquisition expense / identified incremental new customers
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Next-tranche marginal CAC	Additional expense / additional incremental customers between feasible spend levels
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Contribution LTV	Sum discounted expected future contribution, less only excluded expected future costs, using the Chapter 2 convention
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Net intervention value	Incremental contribution less incremental costs not already included
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Retention approximation	Treatment-control rate difference × number actually treated × additional contribution per retained account, less excluded treatment costs
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Payback	First time cumulative relevant contribution covers acquisition investment, with observed/forecast and discount convention explicit
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Prefer direct contribution per assigned eligible account to an approximate retention-rate-times-value calculation when data supports it. Keep trial treatment count separate from a projected rollout. If the incremental-customer denominator plausibly spans zero, report effects and economic ranges instead of a precise CAC ratio.

Tranche and customer quality comparison

T2 · tranche-and-customer-quality-comparison

Option / cohort / tranche:

Comparable horizon and customer definition:

Observed quality: activation, retained contribution, returns, service cost:

Forecast value and out-of-time validation, if used:

Incremental customer/treatment effect and interval or range:

Incremental expense and extra delivery/system cost:

Net contribution: downside / base / upside:

Cash timing and payback:

Minimum feasible amount / upper cap / capacity / strategic commitments:

Alternative use of the same money and staff:

Decision, owner and condition that reverses it:

guidance · not part of the record

A CAC/LTV comparison is acceptable only when cost scope, horizon, causal status and customer entity align. Use cohort aggregates first; a forecast ratio alone does not authorise scale.

Comparative five-year ownership view

T2 · comparative-five-year-ownership-view

guidance · not part of the record

Create a column for A current practice, B repaired conventional work, C B plus AI, and D C plus additional integration or autonomy. Each row contains local amounts and sources, not an assumed industry benchmark.

Year 0: configuration/build, relevant data repair, evaluation, procurement,

security, training, transition and dual run

Years 1–5: licences, infrastructure, model use, maintenance/API changes,

review/rework, measurement, support, incidents and retraining

Exit: export, migration, contract exit, retained records and retirement

Staff capacity/opportunity cost: separately identified by role and year

Adoption and outcome-maturation assumptions:

Benefit rows: non-overlapping incremental contribution and realised cash savings

Cash-flow convention, Finance discount rate and tax/working-capital treatment:

No-change and downside scenarios:

guidance · not part of the record

For each option calculate net benefit as incremental contribution plus realised savings minus costs not already included. If calculating cash NPV, use signed net cash flow by year and the Finance-approved discount convention; year 0 is undiscounted. Report B–A, C–B and D–C separately. Allocate shared cost transparently and count it only once. Do not count an incident allowance both as cost and as a second expected-loss deduction.

Benefit realisation template

T2 · benefit-realisation-template

Benefit ID / intervention ID / owner / Finance reviewer:**Current process cost / new process cost, including review and rework:****Accepted output standard and observed volume:****Capacity saved: hours, role, period and evidence:****How capacity will be used: remove expense / avoid approved expense /****named redeployment / unmonetised capacity****Revenue effect, causal status and horizon:****Contribution or margin effect, net of variable costs:****Risk/quality effect and evidence (do not monetise without a defensible basis):****Implementation cost / recurring cost / exit cost:****Cash action: exact budget, contract or approved-hire change and date:**

Payback and uncertainty:

Overlapping benefits excluded:

Forecast / observed / realised status and review date:

Stop or restatement condition:

guidance · not part of the record

60-minute workshop: Finance defines scope for ten minutes; the owner maps A–D for ten; the team prices costs and benefits for twenty; it challenges downside adoption and double counting for fifteen; the final five assigns the expense or delivery action. If inputs are missing, commission those inputs rather than manufacturing ROI.

evidence for this tool

5 claim records qualify this tool. Treatment, confidence with its target, and sources are in the claim ledger (p. 7).

- C01 Contribution and cash govern investment (p. 7)
- C06 Separate process, AI and coordination gains (p. 7)
- C07 Hours saved become financial savings (p. 7)
- C08 Five-year ownership and exit cost (p. 7)
- C12 Precise next-dollar optimisation (p. 7)

sources cited

- GRW — AI-Augmented-GTM-Growth-and-Performance-Architecture.md (p. 8)
- OPS — AI-Augmented-GTM-Operating-Model-and-Transformation-Plan.md (p. 8)
- RT — AI-Augmented-GTM-Red-Team-Verdict.md (p. 8)

Claim ledger

5 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 qualification evidence level source destination	Contribution and cash govern investment Value revenue through relevant costs and a declared horizon; no guaranteed return. Economic identity STR §17; GRW §§1–7; RT §§12–18 CH02 · P01 · <u>T2</u> (p. 1)
C06	Accepted	confidence: High	Separate process, AI and coordination gains confidence target qualification evidence level source destination	Separate process, AI and coordination gains Compare current practice A, repaired conventional B, B plus AI C, and added integration D. Comparative investment logic GRW opening falsification; RT §§9,15 CH02 · P10 · <u>T2</u> (p. 1)
C07	Qualified	confidence: High	Hours saved become financial savings — narrowed, not endorsed confidence target qualification evidence level source destination	Editorial qualified of the historical claim. Supported boundary: Capacity stays separate until expenditure disappears or useful redeployment is observed. Capacity stays separate until expenditure disappears or useful redeployment is observed. Accounting distinction OS §14; OPS §§21,43; RT §14 CH02 · P10 · <u>T2</u> (p. 1)
C08	Accepted	confidence: High	Five-year ownership and exit cost confidence target qualification evidence level source destination	Five-year ownership and exit cost Separate cash from staff opportunity cost; count shared cost once. Cost model, local amounts absent SYS §34; AGT §65; OPS §43; RT §§13–17 T5 · CH02 · <u>T2</u> (p. 1)
C12	Qualified	confidence: High	~~Precise next-dollar optimisation~~ — narrowed, not endorsed confidence target qualification evidence level source destination	Editorial qualified of the historical claim. Supported boundary: Use the next feasible investment tranche, ranges, real budget rights and protected commitments. Use the next feasible investment tranche, ranges, real budget rights and protected commitments. Economic principle, uncertain estimates STR §18; GRW §§49–51; RT §§19,23 CH05 · P11 · <u>T2</u> (p. 1)

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).