

Evidence Locker / Value evidence

Customer Outcome Capture

Capture the customer's change clearly enough for someone outside the account team to understand.

When to use it

Use after a meaningful engagement, milestone, or completed action, while the evidence is still accessible.

Work the questions in order

1. Describe the customer problem in plain language, then separate the team's actions from the customer outcome.
2. Record the evidence and credit the people who contributed. Label estimates and observations honestly.
3. Check sharing permission and confidentiality before reusing the story for a different audience.

Fictional worked example

A team implemented a new reporting workflow and the customer confirmed it is being used in a planning meeting. Record that confirmation. Do not convert it into estimated savings unless the customer validates the calculation.

A note on judgment

A meeting, training session, or delivered dashboard is an activity or output. Explain the customer change separately, and do not manufacture one when it is not yet known.

Open the related case

[The Missing Evidence](#)

Newly created educational template, not a former-employer document or a validated scoring model. Adapt it to your context. Keep confidential information out of shared copies.

Your working notes

Customer Outcome Capture / Part 1 of 2

Context or anonymized account: _____

Date: _____ Review date: _____

01 Customer context

Use an anonymized account description in externally shared copies.

02 Problem or desired outcome

What did the customer need to change, and why did it matter?

03 Actions and contributions

What did the CSM do? What did the customer, engineer, sales partner, or other contributor do?

04 Observed result

What changed for the customer? If the result is pending, say so.

From clues to action

Customer Outcome Capture / Part 2 of 2

05 Evidence

What supports the result? Record source, date, and whether it is measured, reported, or inferred.

06 Limits and attribution

What cannot be concluded? What other factors may have influenced the result?

07 Reuse and permission

Who may see this version? What details must be removed?

08 Follow-up

What additional evidence or customer confirmation is still needed?

Before you close the file

Check what is known, what is assumed, and what still needs confirmation. Agree on the next action and the review point. A completed worksheet is not a solved case.