

Evidence Locker / Risk interpretation

Signal Validation & Action Log

Separate an observation from a diagnosis, then turn the investigation into a next action.

When to use it

Use before escalating a health-score change or treating an activity metric as evidence of value.

Work the questions in order

1. Record exactly what changed and how the signal was generated.
2. Write down at least one alternative explanation and seek corroborating customer context.
3. Choose the next useful action, assign an owner, and record what would change your assessment.

Fictional worked example

Customer logins decline, but an automated report still supports a weekly planning meeting. Confirm that the intended recipients receive and use the report before deciding whether the account is disengaged.

A note on judgment

This is a reasoning worksheet, not a validated predictive model. Do not turn its fields into universal risk weights without testing them in your own context.

Open the related case

[The Metric That Lied](#)

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

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Context or anonymized account: _____

Date: _____ Review date: _____

01 Observed signal

What changed? Include the source, date, and measurement window.

02 How it is produced

Whose actions count? Could automation, internal access, missing data, or a changed definition affect it?

03 Initial hypothesis

What might it mean for the customer? Keep this separate from fact.

04 Alternative explanation

What else could produce the same signal?

From clues to action

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05 Corroborating evidence

What does the customer say? What other evidence agrees or conflicts?

06 Assessment and uncertainty

What do you currently believe, and what is still unknown?

07 Action, owner, review

What happens next, who owns it, and when will the assessment be revisited?

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.