WORKBOOK LIBRARY

Make the Mission Yours

Pick a role to dive into tailored activities that help you apply each principle to your product, service, or project.

Generic Workbook (Any Role)

Use this if your role is not listed; adapt the activities to your context.

Software Developer

Build with context, outcomes, and clear stories that connect code to users.

QA Engineer

Test for user outcomes, not just defects; bring user signals into quality.

DevOps Engineer

Operate with reliability and user impact in mind, connecting pipelines to outcomes.

Security Engineer

Protect users by connecting security work to real user journeys and risks.

Scrum Master

Facilitate flow and alignment around outcomes and user value.

Product Manager

Own mission clarity, user signals, and outcome focus for the team.

Business Analyst

Bridge business outcomes, user needs, and clear requirements across teams.

Product Analyst

Translate data into user stories and outcome insights.

Project Manager

Orchestrate delivery around user outcomes and clear context.

Human-Centered Design Researcher

Ground the team in real user signals and context.

HCD Designer

Design experiences anchored in user reality and mission.

Policy Analyst

Bridge policy intent with product execution and user impact.

Data Analyst

Turn data into actionable user and business insights.

Data Engineer

Build trustworthy data foundations tied to user and business outcomes.

Customer Support

Turn frontline insights into product and user-value improvements.

Architect

Design systems and solutions that align with mission, serve users, and enable teams to deliver outcomes.

Federal Agency - Business/Product Owner

Align product decisions with agency mission, citizen outcomes, and federal compliance requirements while bridging business needs and technical delivery.

Federal Agency - IT Stakeholder

Balance technical excellence, security compliance, and mission alignment while enabling product teams to deliver citizen value.

Enterprise - Business/Product Owner

Drive product decisions that align with business strategy, customer outcomes, and enterprise goals while navigating organizational complexity.

Enterprise - IT Stakeholder

Balance technical excellence, security compliance, and business alignment while enabling product teams to deliver customer value.

WORKBOOK

Make the Mission Yours

Role: **Generic Workbook (Any Role)**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Connect your daily work to mission and user outcomes so you decide with clarity.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission in one sentence and list the two user outcomes your current work should move.
- ☐ Annotate today's top task with the outcome it supports and how you will notice success.
- ☐ Share your outcome mapping with a peer and ask them to challenge one gap you may have missed.
- ☐ Create a simple "why this matters" note on your ticket or task and post it in your team channel.
- ☐ At standup, state one task and the mission outcome it supports; refine based on team feedback.

AI Assisted Activities

- ☐ Use generative AI to draft a mission statement or outcome mapping, then have your team review and refine it together to ensure it reflects real user needs and business goals.
- ☐ Ask AI to generate potential user outcomes for your current work, then validate each one against direct user feedback and domain knowledge.
- ☐ Use AI to help structure your "why this matters" notes, but ensure human team members validate that each task truly serves the mission before proceeding.
- ☐ Have AI analyze past mission statements or product visions, then use those insights in a team discussion to refine your current mission alignment.

Evidence of Progress

- ☐ You can explain how each task ties to mission and user outcomes.
- ☐ Peers acknowledge your stated outcomes and offer fewer clarifying questions.

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2) Break Down Silos

Reduce over-the-wall handoffs by collaborating directly with adjacent roles.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Invite a partner in a different role to a 20-minute co-working session to close an open question.
- ☐ Document one recurring handoff friction and propose a specific tweak to remove it this sprint.
- ☐ Add a one-line “handoff guardrail” (what must be true before/after) to your active task and review it with the receiving role.
- ☐ Share a WIP screenshot/doc with another function and ask for one integration risk to address today.
- ☐ Replace one async back-and-forth with a live huddle to finish a task together.

AI Assisted Activities

- ☐ When AI generates work products (code, designs, documentation), have cross-functional team members review it together to ensure it serves the mission and users.
- ☐ Use AI to help draft context sync agendas or meeting notes, but ensure all roles contribute their perspectives during the actual sync to build shared understanding.
- ☐ Have AI analyze handoff patterns in your team's communication, then use those insights in a cross-functional discussion to identify and remove friction points.
- ☐ Use AI to help structure collaboration sessions, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Fewer reopens or clarifications on the item you co-worked.
- ☐ Integration risks are identified and addressed earlier.

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3) User Engagement

Ground decisions in real user signals, not assumptions.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Observe or replay one user/support session; write three takeaways and one change you will make now.
- ☐ Turn one user quote into an actionable tweak in your current work and document it.
- ☐ Identify a user assumption you hold; design a same-sprint validation (log, quick test, or direct question).
- ☐ Add one lightweight telemetry/log to capture a behavior you currently assume; review it post-release.
- ☐ Share a short “before/after” narrative of how a user experiences the problem you are solving.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings, but ensure team members review the summaries and add their own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from telemetry, then discuss those patterns with actual users to understand the "why" behind the behavior.

Evidence of Progress

- ☐ A recent user interaction changed a decision you made.
- ☐ You added instrumentation or validation and reviewed it after release.

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4) Outcomes Over Outputs

Define and check impact, not just completion.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Add an “expected outcome” line to your current task/ticket and get stakeholder confirmation.
- ☐ Define one measurable signal you can influence for this work; note how/when you will observe it.
- ☐ Plan a quick outcome readout 1–2 weeks after release and schedule it.
- ☐ After release, post the observed result versus expected; propose one adjustment if it missed.
- ☐ Add a rollback/mitigation note tied to the outcome you are targeting.

AI Assisted Activities

- ☐ When AI generates features or work products, define outcome metrics upfront and measure whether AI-generated work achieves intended user outcomes, not just technical completion.
- ☐ Use AI to help analyze outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust based on observed impact.

Evidence of Progress

- ☐ Tasks/PRs include expected outcomes and post-release checks.
- ☐ You adjusted based on outcome data, not only bug reports.

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5) Domain Knowledge

Understand the ecosystem, constraints, and dependencies shaping your work.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Map upstream/downstream dependencies for your current item and note owners and failure behaviors.
- ☐ Sketch a simple front-stage/back-stage view showing where your work supports the user experience.
- ☐ Meet one domain expert (support/ops/policy/finance) to confirm constraints relevant to this task.
- ☐ Review a past incident related to domain gaps; list one guardrail you will apply now.
- ☐ Call out one domain rule in your task/PR and verify it with the appropriate owner.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation or industry reports, but validate AI-generated domain knowledge through direct engagement with domain experts and real-world observation.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft service maps or ecosystem diagrams, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past incidents or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ You can describe impacts to upstream/downstream systems and users.
- ☐ Domain constraints appear explicitly in your notes or reviews.

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6) The Art of Storytelling

Explain work in human terms to align stakeholders and motivate action.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Practice a 60-second story: who the user is, their pain, what you changed, and the result; share in chat.
- ☐ Add a real user quote or data point to your next update to make the impact concrete.
- ☐ Create two versions of an update: one for peers (details/trade-offs) and one for stakeholders (outcome/next step).
- ☐ Write a short before/after vignette for the current item and post it in your team channel.
- ☐ Pair with a teammate to refine the story so they can retell it accurately to others.

AI Assisted Activities

- ☐ Use AI to help structure or draft stories, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of explanations for different audiences, but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize technical work, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft documentation or updates, but always include real user quotes, data points, or anecdotes that connect the work to human impact.

Evidence of Progress

- ☐ Teammates or stakeholders can retell your story correctly.
- ☐ Updates include user quotes or data and resonate with non-technical audiences.

WORKBOOK

Make the Mission Yours

Role: **Software Developer**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

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> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
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> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Tie your code to mission and user outcomes so you can make decisions without waiting on direction.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission in one paragraph and list two user outcomes your current feature must move.
- ☐ Annotate the ticket you are starting with the specific user job/task it helps and the signal you will watch.
- ☐ Add a “why this matters” note to your PR description referencing the user outcome and expected behavior change.
- ☐ In standup, state one implementation choice you’ll make differently because of the mission/outcome.
- ☐ Pair with a teammate to sanity-check that your chosen approach still serves the stated outcome.

AI Assisted Activities

- ☐ Use AI to help draft mission statements or outcome mappings for your features, but have your team review and refine them to ensure they reflect real user needs.
- ☐ Ask AI to generate potential user outcomes for your code changes, then validate each one against direct user feedback and domain knowledge before implementing.
- ☐ Use AI to help structure your "why this matters" notes in PRs, but ensure human team members validate that each change truly serves the mission before merging.
- ☐ Have AI analyze past PR descriptions to identify mission alignment patterns, then use those insights in team discussions to improve how code connects to user outcomes.

Evidence of Progress

- ☐ You can explain any PR in terms of the user outcome it serves.
- ☐ Your PRs include a short “why” tied to mission/user outcome.

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2) Break Down Silos

Work alongside design, QA, and ops instead of throwing work over the wall.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Pair with QA to co-create acceptance tests and edge cases before coding.
- ☐ Run a 15-minute pre-build huddle with design and PM to review intent, data needs, and constraints.
- ☐ Invite DevOps/ops to review rollout, health checks, and rollback for this change.
- ☐ Share a WIP snippet with design/QA to catch integration issues early (e.g., states, data, error UX).
- ☐ Replace one async back-and-forth with a live co-working block to finish a tricky piece together.

AI Assisted Activities

- ☐ When AI generates code, have cross-functional team members (design, QA, ops) review it together to ensure it serves users and integrates well with the system.
- ☐ Use AI to help draft context sync agendas or technical documentation, but ensure all roles contribute their perspectives during the actual sync.
- ☐ Have AI analyze code review patterns to identify handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure collaboration sessions or pair programming, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Fewer post-handoff clarifications or reopenings on the story you paired on.
- ☐ Acceptance tests match what QA runs, with fewer surprises after merge.

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3) User Engagement

Keep a line of sight to real users so you build with empathy.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Observe or replay one support/usability session; write three takeaways and one code change you will make now.
- ☐ Instrument one behavior you are assuming (log/metric) and review it post-release.
- ☐ Rewrite the current user story as a short narrative (before/after) and share it with the team.
- ☐ Pair with a designer/PM to validate a user edge case you surfaced; note the decision in the ticket.
- ☐ Shadow a support query relevant to your feature and capture the exact user phrasing to guide your UX/error handling.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or error logs to identify patterns, but always validate AI insights through direct user observation or usability testing.
- ☐ Have AI generate questions for user interviews based on your code assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings related to your features, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from your instrumentation, then discuss those patterns with actual users to understand the "why" behind the behavior before making code changes.

Evidence of Progress

- ☐ You can cite a user interaction that changed an implementation choice.
- ☐ You added instrumentation and reviewed it post-release.

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4) Outcomes Over Outputs

Measure success by user/business impact, not just “done”.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Pick one metric you can influence for this feature (e.g., task time, error rate) and add it to the PR.
- ☐ Write the expected behavior change and when/how you will observe it after release.
- ☐ Add a “definition of done + outcome” checklist to your PR: signal, measure, rollback trigger.
- ☐ After release, post a short readout comparing expected vs. observed and propose one follow-up action.
- ☐ If the outcome missed, log one hypothesis and a code/config tweak you will try next.

AI Assisted Activities

- ☐ When AI generates code or features, define outcome metrics upfront in your PR and measure whether AI-generated code achieves intended user outcomes, not just technical completion.
- ☐ Use AI to help analyze outcome data from your instrumentation and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for your code changes, but ensure the team validates them against real user needs and business goals before merging.
- ☐ Use AI to track and report on outcome metrics from your code, but schedule human team reviews to discuss what the metrics mean and how to adjust code based on observed impact.

Evidence of Progress

- ☐ Each shipped PR references an outcome and a follow-up check.
- ☐ You've adjusted code/config based on observed outcomes, not only bug reports.

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5) Domain Knowledge

Understand upstream/downstream and the service ecosystem to make better technical decisions.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Sketch a quick sequence/data-flow for this feature showing upstream/downstream calls, owners, and failure modes.
- ☐ Create a simple front-stage/back-stage map for the flow and mark where your code supports the user experience.
- ☐ Meet a domain expert (support/ops/policy) to confirm a constraint that should change your design; note it in the ticket.
- ☐ Review one past incident tied to this domain and list a guardrail you will add to this change.
- ☐ Call out an integration or policy constraint in your PR and tag the owner for confirmation.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, API contracts, or system architecture docs, but validate AI-generated domain knowledge through direct engagement with domain experts and code reviews.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your code, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft sequence diagrams or system maps, but ensure team members review them with domain experts to verify accuracy and completeness before implementing.
- ☐ Have AI analyze past incidents or domain-related bugs, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems in your code.

Evidence of Progress

- ☐ You can describe how your change affects upstream/downstream systems.
- ☐ Your design notes/PRs call out domain or policy constraints explicitly.

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6) The Art of Storytelling

Explain your work in human terms to align and inspire.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Dinner-table test: describe this feature in two sentences focused on the user problem and impact.
- ☐ Write a before/after story for this feature and share it at demo with a user quote or data point.
- ☐ Prepare two updates: one technical (architecture/trade-offs) and one stakeholder-friendly (impact/next step).
- ☐ Record a 60-second story (user, pain, change, result) and post it in the team channel.
- ☐ Add a single slide/snippet that shows the user task improved (e.g., time saved, error avoided) and use it in your next review.

AI Assisted Activities

- ☐ Use AI to help structure or draft PR descriptions and technical stories, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of code explanations for different audiences (technical peers vs stakeholders), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize technical work in demos, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft code documentation or release notes, but always include real user quotes, data points, or anecdotes that connect your code to human impact.

Evidence of Progress

- ☐ Teammates reuse your story to explain the value of the feature.
- ☐ Stakeholders can retell your update without losing the point.

WORKBOOK

Make the Mission Yours

Role: **QA Engineer**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

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>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Anchor tests to mission outcomes and user goals.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission in your test plan and map each suite to a user outcome (e.g., checkout success, claim submitted).
- ☐ For the current story, write the user behavior you are protecting and the exact signal you will observe post-release.
- ☐ Add a “why this matters” note to one critical test, tied to mission and a specific user scenario.
- ☐ Review today’s top ticket and restate acceptance in terms of user intent and success criteria.
- ☐ Walk a developer through how this test defends a user outcome; adjust if the mission link is weak.

AI Assisted Activities

- ☐ Use AI to help draft test plans that map to mission outcomes, but have your team review and refine them to ensure tests truly protect user value.
- ☐ Ask AI to generate potential test scenarios based on user outcomes, then validate each scenario against direct user feedback and real-world usage patterns.
- ☐ Use AI to help structure your "why this matters" notes in test cases, but ensure human team members validate that each test truly serves the mission before executing.
- ☐ Have AI analyze past test plans to identify mission alignment patterns, then use those insights in team discussions to improve how tests connect to user outcomes.

Evidence of Progress

- ☐ Your test cases cite user outcomes, not just components.
- ☐ You can explain how a failing test ties to a user impact.

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2) Break Down Silos

Prevent over-the-wall surprises by co-designing quality.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Pair with a developer in grooming to co-author acceptance tests and edge cases for this story.
- ☐ Join a designer/PM review to agree on the critical user journey and negative paths you will test.
- ☐ Create a “ready for QA” checklist for this feature (data, environments, UX states) and circulate today.
- ☐ Host a 10-minute sync with DevOps/ops to confirm logging and observability for your test focus.
- ☐ Share a WIP test note with design/PM to confirm UX acceptance before executing.

AI Assisted Activities

- ☐ When AI generates test cases or test data, have cross-functional team members (developers, designers, product managers) review them together to ensure they serve users and cover the right scenarios.
- ☐ Use AI to help draft acceptance criteria or test plans, but ensure all roles contribute their perspectives during the actual test design session.
- ☐ Have AI analyze test patterns and bug reports to identify handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure test collaboration sessions, but ensure human team members make decisions together about what to test and how it serves users.

Evidence of Progress

- ☐ Fewer reopened bugs due to unclear acceptance or missed UX criteria.
- ☐ Developers reference your acceptance notes before handing off.

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3) User Engagement

Test with real user signals and empathy.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Observe or replay a user session and extract three real data values/flows to seed your tests.
- ☐ Translate a top support issue into a regression scenario and add it to the suite.
- ☐ Run an exploratory session mimicking how a real user might fail; log unexpected behaviors.
- ☐ For this story, capture one user quote and turn it into a test note for empathy and clarity.
- ☐ Validate one assumed user behavior by pairing with support/PM and adjusting test data accordingly.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or error logs to identify patterns for test scenarios, but always validate AI insights through direct user observation or usability testing.
- ☐ Have AI generate test questions or scenarios based on your assumptions about user behavior, then use those scenarios in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for test planning, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from telemetry, then discuss those patterns with actual users to understand the "why" behind the behavior before writing tests.

Evidence of Progress

- ☐ You use real-world data patterns in tests, not only synthetic inputs.
- ☐ A support-reported issue is now covered by an automated/regression test.

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4) Outcomes Over Outputs

Measure quality by escaped defects and user-visible impact.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Define one quality outcome for this release (e.g., escaped defects for journey X) and log it in the plan.
- ☐ After release, review logs/tickets for this journey and link each issue to a prevention in tests.
- ☐ Add a post-release check for the journey metric you guarded (e.g., task success rate, error rate).
- ☐ For one failed outcome, propose a specific test/guard to add this sprint and do it.
- ☐ Share a short quality readout: what you protected, what moved, what to improve next.

AI Assisted Activities

- ☐ When AI generates test cases or test automation, define quality outcome metrics upfront and measure whether AI-generated tests achieve intended user outcomes, not just coverage.
- ☐ Use AI to help analyze test outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft quality outcome definitions and success criteria for your tests, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on quality outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust tests based on observed impact.

Evidence of Progress

- ☐ You report on a quality outcome metric, not just test counts.
- ☐ You closed the loop from post-release issues to added/updated tests.

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5) Domain Knowledge

Test with domain constraints and ecosystem awareness.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Map upstream/downstream systems for this journey; design one targeted test per critical dependency.
- ☐ Use a service map to add a test that covers a backstage failure surfacing in the UI.
- ☐ Review one policy/regulatory constraint and craft a compliance test for this story.
- ☐ Identify a data contract assumption; create a test that fails loudly if the contract breaks.
- ☐ Tag one domain risk in your test plan and confirm coverage with the domain owner.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, API contracts, or system architecture for test planning, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your tests, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft test coverage maps or dependency diagrams, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past incidents or domain-related test gaps, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Your tests cover dependency and policy constraints explicitly.
- ☐ You can explain how a system failure would present to users and which test covers it.

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6) The Art of Storytelling

Tell the story of quality in user terms.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Share a “bug story” in retro: user impact → root cause → new test that prevents it.
- ☐ Write a short narrative for the critical path you just tested: user success and how tests enforce it.
- ☐ Prepare two summaries of a run: one for engineers (coverage/edge cases) and one for stakeholders (risk reduced).
- ☐ Add a user quote or data point to your test summary to make impact tangible.
- ☐ Record a 60-second walkthrough of a critical test explaining the user risk it guards.

AI Assisted Activities

- ☐ Use AI to help structure or draft test summaries and bug stories, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of test reports for different audiences (technical peers vs stakeholders), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize test results in demos, but lead presentations with human stories about real users affected by bugs, using AI-generated summaries as supporting material.
- ☐ Have AI help draft test documentation or quality reports, but always include real user quotes, data points, or anecdotes that connect your test work to human impact.

Evidence of Progress

- ☐ Stakeholders can restate the risk reduced from your test summary.
- ☐ The team references your bug story to justify quality work.

WORKBOOK

Make the Mission Yours

Role: **DevOps Engineer**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
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> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Align reliability work to user-facing mission outcomes.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ List two mission-critical user journeys and map the infra components each depends on.
- ☐ Add the mission/outcome to one runbook header (e.g., “keeps checkout under 2s for users”).
- ☐ Review the next release and note the infra implication for the user outcome it targets.
- ☐ Tag today’s top ticket with the user journey it protects and the SLO tied to that journey.
- ☐ Share in standup one infra choice you will make differently because of the mission outcome.

AI Assisted Activities

- ☐ Use AI to help draft mission statements or outcome mappings for your infrastructure work, but have your team review and refine them to ensure they reflect real user needs.
- ☐ Ask AI to generate potential user outcomes for your infrastructure changes, then validate each one against direct user feedback and system performance data.
- ☐ Use AI to help structure your "why this matters" notes in infrastructure tickets, but ensure human team members validate that each change truly serves the mission before deploying.
- ☐ Have AI analyze past infrastructure changes to identify mission alignment patterns, then use those insights in team discussions to improve how infrastructure connects to user outcomes.

Evidence of Progress

- ☐ Runbooks and tickets state which user journey they protect.
- ☐ You can explain infra tasks in terms of user outcomes (latency, uptime for journey X).

---

2) Break Down Silos

Co-create delivery with product/engineering/QA.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Co-design rollout/rollback with engineering and QA for the next release and document it.
- ☐ Host a 15-minute “deployment huddle” to align on blast radius, metrics, and comms.
- ☐ Pair with a developer to add health checks and alerts before release.
- ☐ Invite PM/QA to review the change freeze/allow list for this deploy window.
- ☐ Replace an email thread with a live review of the deployment plan and risk matrix.

AI Assisted Activities

- ☐ When AI generates deployment plans or infrastructure code, have cross-functional team members (developers, QA, product managers) review them together to ensure they serve users and maintain reliability.
- ☐ Use AI to help draft deployment huddle agendas or runbooks, but ensure all roles contribute their perspectives during the actual planning session.
- ☐ Have AI analyze deployment patterns and incident reports to identify handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure deployment collaboration sessions, but ensure human team members make decisions together about what to deploy and how it serves users.

Evidence of Progress

- ☐ Rollouts include pre-agreed metrics and rollback steps.
- ☐ Fewer surprise escalations during deployment windows.

---

3) User Engagement

See how reliability affects real users.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Listen to a support call about performance/outage and capture the user pain in their words.
- ☐ Add or refine one SLI/SLO tied to a specific user journey (e.g., p95 page load for task X).
- ☐ Shadow or replay a user session to see how latency/errors show up in the UI.
- ☐ Trace one recent incident to the user-facing symptom and note how to detect it sooner.
- ☐ Share a user quote about reliability in your next ops review to anchor priority.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or performance logs to identify reliability patterns, but always validate AI insights through direct user observation or support call reviews.
- ☐ Have AI generate questions for user interviews based on your infrastructure assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings related to reliability, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from your monitoring, then discuss those patterns with actual users to understand the "why" behind reliability issues before making infrastructure changes.

Evidence of Progress

- ☐ You can quote a user impact when prioritizing infra work.
- ☐ You track at least one SLO tied to a concrete user journey.

---

4) Outcomes Over Outputs

Track reliability outcomes, not just deployments.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For this change, define the expected outcome (e.g., error rate down, latency down) and observation window.
- ☐ After rollout, post a brief readout with before/after metrics and next action.
- ☐ Add a “runway” checklist to the change: outcome metric, alert threshold, rollback trigger.
- ☐ If the outcome missed, propose a config/tuning adjustment and schedule it.
- ☐ Flag one noise-prone alert and tune it to better reflect user impact.

AI Assisted Activities

- ☐ When AI generates infrastructure configurations or deployment scripts, define reliability outcome metrics upfront and measure whether AI-generated changes achieve intended user outcomes, not just technical completion.
- ☐ Use AI to help analyze outcome data from your monitoring and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for your infrastructure changes, but ensure the team validates them against real user needs and business goals before deploying.
- ☐ Use AI to track and report on reliability outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust infrastructure based on observed impact.

Evidence of Progress

- ☐ Infra changes include outcome hypotheses and post-release readouts.
- ☐ You rolled back or tuned based on outcome metrics, not just logs.

---

5) Domain Knowledge

Understand service dependencies and business constraints.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Create a dependency map for a key journey showing services, queues, and external calls with owners.
- ☐ Mark which dependencies are front stage vs. back stage; highlight weakest links and owners.
- ☐ Review one compliance/policy constraint (data residency, retention) that affects this change and document it.
- ☐ Inspect a past reliability incident in this domain; list a guardrail or monitor to add now.
- ☐ Validate one third-party dependency assumption and record the result in the runbook.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, service dependencies, or compliance requirements, but validate AI-generated domain knowledge through direct engagement with domain experts and system reviews.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your infrastructure, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft dependency maps or service diagrams, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past incidents or domain-related infrastructure issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ You can point to the most fragile dependency for a user journey and the mitigation in place.
- ☐ Runbooks reference domain/policy constraints explicitly.

---

6) The Art of Storytelling

Translate infra work into user value.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Explain one reliability improvement as a user story: who is helped, what changed, and by how much.
- ☐ Create two summaries of an incident: technical (root cause) and user-facing (impact, prevention).
- ☐ Share a before/after narrative of a perf fix with charts and the user task it improved.
- ☐ Add a user quote or support snippet about reliability to your next ops update.
- ☐ Record a 60-second video explaining how this change protects a specific user journey.

AI Assisted Activities

- ☐ Use AI to help structure or draft infrastructure stories and incident summaries, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of infrastructure updates for different audiences (technical peers vs stakeholders), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize infrastructure work in demos, but lead presentations with human stories about real users affected by reliability issues, using AI-generated summaries as supporting material.
- ☐ Have AI help draft runbooks or infrastructure documentation, but always include real user quotes, data points, or anecdotes that connect your infrastructure work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell your infra updates in business terms.
- ☐ Teams cite your incident summaries to justify preventative work.

WORKBOOK

Make the Mission Yours

Role: **Security Engineer**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

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> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Frame security work in terms of protecting mission-critical user journeys.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Identify two mission-critical user journeys and map the key controls that protect each.
- ☐ Rewrite one security requirement in user language (who is protected, from what, why) and share it.
- ☐ Add “mission risk” to the current security ticket with the user harm it prevents.
- ☐ Review a planned feature and note one security implication to the user journey; tag the owner.
- ☐ State in standup which journey you are protecting this week and how you will know it’s working.

AI Assisted Activities

- ☐ Use AI to help draft security requirements that map to mission outcomes, but have your team review and refine them to ensure they truly protect user value.
- ☐ Ask AI to generate potential security controls based on user journeys, then validate each control against direct user feedback and threat intelligence.
- ☐ Use AI to help structure your "mission risk" notes in security tickets, but ensure human team members validate that each control truly serves the mission before implementing.
- ☐ Have AI analyze past security requirements to identify mission alignment patterns, then use those insights in team discussions to improve how security connects to user outcomes.

Evidence of Progress

- ☐ Controls are described by the user harm they prevent.
- ☐ Security tickets cite mission risk, not only CVSS or CWE.

---

2) Break Down Silos

Embed security early with product/engineering.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Join the next feature kickoff to add threat scenarios and early mitigations.
- ☐ Co-create a lightweight SDL checklist with engineering for this feature.
- ☐ Pair with QA to design a regression test for a recent vuln class tied to this feature.
- ☐ Hold a 15-minute dev/QA/security review of auth/permissions for the current change.
- ☐ Replace one async review with a live threat modeling mini-session for this story.

AI Assisted Activities

- ☐ When AI generates security controls or threat models, have cross-functional team members (developers, product managers, QA) review them together to ensure they serve users and integrate well.
- ☐ Use AI to help draft threat modeling sessions or security checklists, but ensure all roles contribute their perspectives during the actual security review.
- ☐ Have AI analyze security review patterns and vulnerability reports to identify handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure security collaboration sessions, but ensure human team members make decisions together about what to protect and how it serves users.

Evidence of Progress

- ☐ Features launch with pre-agreed mitigations and tests for key threats.
- ☐ Security findings decrease for the vuln class you paired on.

---

3) User Engagement

See how security controls affect users.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Review a real user flow and note where security friction appears; propose a UX-friendly adjustment.
- ☐ Listen to a support call about auth/access issues and capture user language verbatim.
- ☐ Observe telemetry for auth errors and correlate with a specific user journey.
- ☐ Shadow a usability/auth session to see how MFA/permissions impact task completion.
- ☐ Document one real user pain from security friction and suggest a mitigation to product/UX.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or auth error logs to identify security friction patterns, but always validate AI insights through direct user observation or usability testing.
- ☐ Have AI generate questions for user interviews based on your security assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings related to security, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from your security telemetry, then discuss those patterns with actual users to understand the "why" behind security friction before implementing controls.

Evidence of Progress

- ☐ You have at least one security UX friction item logged with a user quote.
- ☐ Auth/permission changes reference observed user pain, not assumptions.

---

4) Outcomes Over Outputs

Track security by risk reduction and user impact.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Set one measurable outcome for this control (e.g., reduced high-risk findings, reduced auth lockouts).
- ☐ After deploying, report before/after for that outcome and propose a next step.
- ☐ Add a rollback/exception path with conditions to this security change.
- ☐ Align one control to a user journey SLO (e.g., auth success rate) and track it.
- ☐ For one missed outcome, suggest a tuning (rule, threshold, UX change) to reduce friction or risk.

AI Assisted Activities

- ☐ When AI generates security controls or configurations, define security outcome metrics upfront and measure whether AI-generated controls achieve intended user protection outcomes, not just technical compliance.
- ☐ Use AI to help analyze security outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft security outcome definitions and success criteria, but ensure the team validates them against real user needs and business goals before implementing.
- ☐ Use AI to track and report on security outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust controls based on observed impact.

Evidence of Progress

- ☐ Security changes ship with outcome hypotheses and are measured post-release.
- ☐ You can show reduced risk or reduced user friction from a change.

---

5) Domain Knowledge

Map threats and controls across the service ecosystem.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Build a threat map for a key journey (front/back stage) and list compensating controls.
- ☐ Identify third-party dependencies for this journey and note access/keys/rotation status.
- ☐ Review one policy/regulatory requirement and align it to the threat map and owners.
- ☐ Check logs/alerts for a known threat path and note gaps to close in this sprint.
- ☐ Document one least-privilege or segmentation improvement to apply for this work item.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, threat intelligence, or compliance requirements, but validate AI-generated domain knowledge through direct engagement with domain experts and security reviews.
- ☐ Have AI generate questions about domain constraints or threat ecosystem relationships, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft threat maps or security architecture diagrams, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past incidents or domain-related security issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ You can show where threats intersect with services and who owns the control.
- ☐ Policy requirements are mapped to concrete controls and owners.

---

6) The Art of Storytelling

Explain security work as protecting people and outcomes.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Tell a short story: “We added X so that Y user is protected from Z scenario.” Share in review.
- ☐ Create two versions of a recent incident writeup: one for engineers, one for business stakeholders.
- ☐ Present a “day in the life” of an attacker vs. defender for one vuln class to the team.
- ☐ Add a user or business impact line to your next security update to make it memorable.
- ☐ Record a 60-second explainer on how a control prevents a real user-harming scenario.

AI Assisted Activities

- ☐ Use AI to help structure or draft security stories and incident summaries, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of security explanations for different audiences (technical peers vs stakeholders), but ensure each version includes authentic human stories about real user protection.
- ☐ Use AI to help summarize security work in demos, but lead presentations with human stories about real users protected by security controls, using AI-generated summaries as supporting material.
- ☐ Have AI help draft security documentation or incident reports, but always include real user quotes, data points, or anecdotes that connect your security work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell the value of a control in plain language.
- ☐ Engineers reference your attacker/defender story in design discussions.

WORKBOOK

Make the Mission Yours

Role: **Scrum Master**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

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> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Keep the mission visible in ceremonies and team habits.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Start the next planning with a 5-minute mission/outcome refresh tied to the top epic.
- ☐ Create a visible mission + top outcomes card in the team board and reference it in standup.
- ☐ Ask each story owner to state the user outcome before estimation and capture it in the ticket.
- ☐ In daily standup, prompt one person to restate how their work supports the mission.
- ☐ At mid-sprint, re-check goals vs. outcomes and adjust scope to stay aligned.

AI Assisted Activities

- ☐ Use AI to help draft mission refreshes or outcome mappings for ceremonies, but have your team review and refine them to ensure they reflect real user needs.
- ☐ Ask AI to generate potential user outcomes for sprint planning, then validate each one against direct user feedback and domain knowledge during the planning session.
- ☐ Use AI to help structure mission cards or outcome notes for the team board, but ensure human team members validate that each story truly serves the mission before committing.
- ☐ Have AI analyze past sprint goals to identify mission alignment patterns, then use those insights in team discussions to improve how sprints connect to user outcomes.

Evidence of Progress

- ☐ Team members reference mission/outcomes in planning without prompting.
- ☐ Stories include the user outcome in their description or notes.

---

2) Break Down Silos

Facilitate cross-functional collaboration.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Pilot a cross-functional stand-up for one week centered on a single user story/outcome.
- ☐ Run a 15-minute “ready to build” huddle with design/eng/QA to align on intent and risks.
- ☐ Add a simple handoff checklist to the board (design assets, data, acceptance) for this sprint.
- ☐ Schedule one live co-work slot this week for design+eng+QA on the riskiest story.
- ☐ Capture and share one integration risk early from those sessions to prevent rework.

AI Assisted Activities

- ☐ When AI generates meeting agendas or collaboration structures, have cross-functional team members review them together to ensure they serve users and enable effective collaboration.
- ☐ Use AI to help draft handoff checklists or collaboration templates, but ensure all roles contribute their perspectives during the actual collaboration sessions.
- ☐ Have AI analyze team communication patterns and handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure collaboration sessions, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Less back-and-forth during the sprint on the story you piloted.
- ☐ Checklist items are completed before work starts, reducing blockers.

---

3) User Engagement

Bring user signals into team cadence.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Invite one team member per retro to share a user story or clip tied to current work.
- ☐ Add a “user signal” section to sprint review with what we heard and what we’ll change.
- ☐ Ensure this sprint has at least one direct user touch scheduled and visible on the board.
- ☐ Highlight one user quote in standup to refocus the team on impact.
- ☐ Pair a user signal with a current story and prompt the owner to adjust if needed.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for sprint reviews, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on sprint assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for sprint planning, but ensure team members review the summaries and add their own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from telemetry, then discuss those patterns with actual users to understand the "why" behind the behavior before planning sprints.

Evidence of Progress

- ☐ Sprint reviews include user signals, not just demos.
- ☐ Upcoming sprints show scheduled user touchpoints.

---

4) Outcomes Over Outputs

Make outcomes part of the agile rhythm.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Add one outcome metric to this sprint goal and review it in retro.
- ☐ Track a simple outcome per epic (e.g., task success rate) and post a midpoint check.
- ☐ In retro, capture which practices moved/blocked the outcome, not just velocity.
- ☐ Post a mid-sprint outcome check in the team channel and nudge owners if drift appears.
- ☐ Tie one impediment to its impact on the outcome, not just schedule, and remove it.

AI Assisted Activities

- ☐ When AI generates sprint goals or outcome metrics, define outcome metrics upfront and measure whether AI-generated work achieves intended user outcomes, not just story completion.
- ☐ Use AI to help analyze outcome data from sprints and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for sprints, but ensure the team validates them against real user needs and business goals before committing.
- ☐ Use AI to track and report on sprint outcome metrics, but schedule human team reviews in retrospectives to discuss what the metrics mean and how to adjust based on observed impact.

Evidence of Progress

- ☐ Sprint goals include an outcome and are revisited in retro.
- ☐ Outcome trends are visible alongside velocity/burndown.

---

5) Domain Knowledge

Make domain context accessible to the team.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Facilitate a quick ecosystem mapping session for the next epic (front/back stage).
- ☐ Maintain a living “domain cheat sheet” with terms, constraints, and key users; update it this sprint.
- ☐ Invite a domain expert for a 15-minute brown bag; post the top three takeaways to the board.
- ☐ Add domain constraints to the acceptance criteria of the current epic/stories.
- ☐ Highlight one upstream/downstream dependency in planning and secure an owner/commitment.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation or industry reports for team knowledge sharing, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for team discussions, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft domain cheat sheets or ecosystem maps, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past sprints or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Team uses the cheat sheet or map during planning.
- ☐ Domain constraints are cited in story acceptance notes.

---

6) The Art of Storytelling

Use stories to align and motivate.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Open sprint review with a user-impact story from the latest completed item.
- ☐ Coach two team members this sprint to give “story + outcome” updates instead of task lists.
- ☐ Create a short “before/after” narrative for one epic and share at demo.
- ☐ Add a user quote or data point to the demo script to make impact tangible.
- ☐ Record a 60-second recap of the sprint focusing on user outcomes and share it with stakeholders.

AI Assisted Activities

- ☐ Use AI to help structure or draft sprint stories and demo narratives, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of sprint updates for different audiences (team vs stakeholders), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize sprint work in reviews, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft sprint recaps or demo scripts, but always include real user quotes, data points, or anecdotes that connect the sprint work to human impact.

Evidence of Progress

- ☐ Stakeholders recall the user story shared in review.
- ☐ Team updates reference outcomes and user impact naturally.

WORKBOOK

Make the Mission Yours

Role: **Product Manager**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

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>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Keep mission and outcomes explicit and repeated.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission in user language and validate it with three stakeholders and the team.
- ☐ Create a one-page mission/outcomes sheet and pin it to the board and sprint doc.
- ☐ Tie each planned story to a user outcome; remove or defer items without a link.
- ☐ In backlog refinement, require each new item to state its user outcome and success signal.
- ☐ Open planning by restating the mission and how this sprint's bets support it; adjust scope if misaligned.

AI Assisted Activities

- ☐ Use AI to help draft mission statements or outcome mappings for product planning, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential user outcomes for your product bets, then validate each one against direct user feedback and domain knowledge before committing.
- ☐ Use AI to help structure your mission/outcomes sheets, but ensure human team members validate that each backlog item truly serves the mission before prioritizing.
- ☐ Have AI analyze past product decisions to identify mission alignment patterns, then use those insights in team discussions to improve how product work connects to user outcomes.

Evidence of Progress

- ☐ Backlog items show explicit linkage to outcomes.
- ☐ Team members can restate the mission without your prompt.

---

2) Break Down Silos

Align design/eng/QA early on intent and constraints.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Run a joint refinement with design/eng/QA to co-create acceptance and constraints for the next slice.
- ☐ Set a single shared board/backlog and remove duplicate function-specific boards for the pilot.
- ☐ Document decisions and context in one place (PRD/light brief) and review with the squad.
- ☐ Hold a 20-minute live decision review for a contentious item instead of async churn.
- ☐ Pair with QA/Dev to agree on non-negotiable acceptance for the riskiest story this sprint.

AI Assisted Activities

- ☐ When AI generates product requirements or feature descriptions, have cross-functional team members (design, engineering, QA) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft product briefs or PRDs, but ensure all roles contribute their perspectives during the actual refinement sessions.
- ☐ Have AI analyze product handoff patterns and requirement gaps, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure product collaboration sessions, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Fewer mismatches between design/eng/QA on the pilot stories.
- ☐ One shared backlog is used in stand-ups and planning.

---

3) User Engagement

Ensure continuous, direct user input.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Schedule at least one user touch this sprint (interview/test/shadow) and include an engineer/designer.
- ☐ Publish a one-page readout with clips/quotes after each session; highlight one decision it informs.
- ☐ Replace one assumption in the backlog with a validated user quote or data point.
- ☐ Tag a current story with a fresh user quote and ask the owner to adjust if needed.
- ☐ Invite support/sales to confirm the top user pain you're prioritizing this sprint.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for product decisions, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your product assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for product planning, but ensure team members review the summaries and add their own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from analytics, then discuss those patterns with actual users to understand the "why" behind the behavior before making product decisions.

Evidence of Progress

- ☐ Backlog items reference user quotes or observations.
- ☐ Design/eng can cite a recent session that changed a decision.

---

4) Outcomes Over Outputs

Define and track leading indicators for your bets.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For the current bet, define 1–2 leading indicators and a readout cadence.
- ☐ Add outcome hypotheses to the PRD/brief and review them at sprint review.
- ☐ Post a short outcome readout after release; propose next action based on data.
- ☐ If a signal missed, write one hypothesis and a concrete next experiment to run.
- ☐ Align with analytics/eng on exact events/metrics for this bet before build starts.

AI Assisted Activities

- ☐ When AI generates product features or roadmaps, define outcome metrics upfront and measure whether AI-generated product work achieves intended user outcomes, not just feature completion.
- ☐ Use AI to help analyze product outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for product bets, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on product outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust product strategy based on observed impact.

Evidence of Progress

- ☐ Each bet has defined indicators and scheduled readouts.
- ☐ Post-release actions reference data, not just opinions.

---

5) Domain Knowledge

Map the ecosystem and constraints that shape the product.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Create or refresh a service/experience map (front/back stage) for this product area; share with partners.
- ☐ List key domain constraints (policy, compliance, SLAs) in the brief and review with eng/design.
- ☐ Identify the top two upstream/downstream dependencies per epic and involve their owners early.
- ☐ Review a recent incident in this domain and note one mitigation you will enforce in the current epic.
- ☐ Call out one domain risk in the current sprint plan and secure owner/mitigation.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, market research, or industry reports for product planning, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your product, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft service maps or ecosystem diagrams for product planning, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past product decisions or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Epics reference domain constraints and dependencies explicitly.
- ☐ Partners acknowledge and plan for shared dependencies early.

---

6) The Art of Storytelling

Use narrative to align stakeholders and the team.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Write a one-page narrative for the current bet: problem, user, impact, success signal.
- ☐ Prepare two versions of roadmap updates: one for execs (outcomes/risks) and one for the squad (decisions/next steps).
- ☐ Share a before/after user story at sprint review tied to metrics.
- ☐ Add a real user quote or data point to the narrative to anchor the story.
- ☐ Record a 60-second update for stakeholders focusing on user impact and next decision.

AI Assisted Activities

- ☐ Use AI to help structure or draft product narratives and roadmap stories, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of product updates for different audiences (executives vs team), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize product work in reviews, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft product documentation or roadmap updates, but always include real user quotes, data points, or anecdotes that connect your product work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell the narrative and success signals.
- ☐ The team references the narrative when making trade-offs.

WORKBOOK

Make the Mission Yours

Role: **Product Analyst**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Align your analysis to mission outcomes.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Put the mission metric at the top of your main dashboard and annotate why it matters.
- ☐ List the user outcomes for current work and map which metrics signal movement.
- ☐ Review mission/outcomes with PM/Eng to confirm the questions you should answer.
- ☐ Rewrite one analysis request in mission terms and share back with the requester.
- ☐ Flag one vanity metric and replace it with an outcome-linked metric in your next report.

AI Assisted Activities

- ☐ Use AI to help draft mission-aligned dashboards or analysis frameworks, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential outcome metrics for your analysis, then validate each one against direct user feedback and domain knowledge before implementing.
- ☐ Use AI to help structure your mission/outcome mappings in dashboards, but ensure human team members validate that each metric truly serves the mission before tracking.
- ☐ Have AI analyze past analyses to identify mission alignment patterns, then use those insights in team discussions to improve how data connects to user outcomes.

Evidence of Progress

- ☐ Dashboards start with mission/outcome metrics.
- ☐ Analyses explicitly tie back to mission questions.

---

2) Break Down Silos

Co-define events, metrics, and questions with PM/Eng.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Run a tracking design session with PM/Eng before implementation; document events and owners.
- ☐ Create a shared metric dictionary and review with QA for validation checks.
- ☐ Join a design review to ensure measurement covers key user behaviors.
- ☐ Hold a 10-minute validation with QA/Eng to confirm events in staging before launch.
- ☐ Replace an async metric debate with a live alignment on definitions for this release.

AI Assisted Activities

- ☐ When AI generates tracking plans or metric definitions, have cross-functional team members (PM, engineering, QA) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft metric dictionaries or tracking designs, but ensure all roles contribute their perspectives during the actual tracking design sessions.
- ☐ Have AI analyze tracking patterns and metric gaps, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure metric collaboration sessions, but ensure human team members make decisions together about what to measure and how it serves users.

Evidence of Progress

- ☐ Events/metrics are defined before build and validated after.
- ☐ Fewer tracking gaps found post-release.

---

3) User Engagement

Ground your analysis in real user behavior and voice.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Shadow a support or sales call; capture phrases that explain user intent.
- ☐ Pair one usability session with a metric you own; note alignment or mismatch.
- ☐ Translate a top user complaint into a measurable question and instrument it.
- ☐ Add one user quote to your next chart to anchor the story.
- ☐ Validate a surprising metric trend with a quick qualitative check (support, PM, or user clip).

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for analysis, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your data assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for analysis, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from your data, then discuss those patterns with actual users to understand the "why" behind the behavior before finalizing analysis.

Evidence of Progress

- ☐ You cite user quotes alongside charts.
- ☐ A new instrument/metric came directly from user observation.

---

4) Outcomes Over Outputs

Deliver concise outcome readouts and next steps.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For a release, publish a one-page outcome readout: metric movement, why, next step.
- ☐ Flag when outcomes did not move; propose one hypothesis to test next.
- ☐ Add a simple “decision log” to your report noting what changed because of the data.
- ☐ Create two versions of the readout: exec (outcomes/actions) and squad (details/tests).
- ☐ If the outcome missed, propose a concrete experiment and timing to validate the hypothesis.

AI Assisted Activities

- ☐ When AI generates analysis reports or outcome readouts, define outcome metrics upfront and measure whether AI-generated insights achieve intended user outcomes, not just data completeness.
- ☐ Use AI to help analyze outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for your analyses, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust analysis based on observed impact.

Evidence of Progress

- ☐ Reports include clear next actions tied to outcomes.
- ☐ Decisions reference your data and hypotheses.

---

5) Domain Knowledge

Understand data lineage, trust, and the business ecosystem.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Document data lineage for one key metric (sources, transforms, owners).
- ☐ Annotate data quality caveats and include them in dashboards.
- ☐ Map front/back stage data touchpoints for a core journey and mark weakest links.
- ☐ Review one regulatory/privacy constraint with security and add a note to the metric definition.
- ☐ Identify the riskiest upstream data source for this report and add a monitor or caveat.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, data lineage, or business constraints for analysis, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or data ecosystem relationships, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft data lineage maps or metric definitions, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past analyses or domain-related data issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Metric definitions include lineage and quality notes.
- ☐ Stakeholders know which metrics are trustworthy for decisions.

---

6) The Art of Storytelling

Turn data into stories people can act on.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Present one insight as a user story with a chart and a quote that illustrates the behavior.
- ☐ Create two versions of a key finding: a deep dive for the squad and a one-slide exec summary.
- ☐ Frame one metric trend as a before/after narrative tied to a release.
- ☐ Add one user clip or verbatim to the slide to make the insight tangible.
- ☐ Record a 60-second voiceover of a key chart explaining what changed, why, and what to do next.

AI Assisted Activities

- ☐ Use AI to help structure or draft data stories and analysis narratives, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of data insights for different audiences (technical peers vs executives), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize data work in presentations, but lead with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft analysis reports or data presentations, but always include real user quotes, data points, or anecdotes that connect your analysis to human impact.

Evidence of Progress

- ☐ Stakeholders can retell your finding accurately.
- ☐ Teams take action based on your story-backed insights.

WORKBOOK

Make the Mission Yours

Role: **Business Analyst**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Make requirements clearly serve mission and user outcomes.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission and top two outcomes from a business lens; validate with PM/Eng.
- ☐ Map the current requirement to a specific user/business outcome and note it in the ticket.
- ☐ Capture stakeholder success criteria for this feature and add them to acceptance.
- ☐ In refinement, restate how the story serves the outcome; drop or rework items that don't align.
- ☐ Create a one-sentence value statement for this feature and share it in the team channel.

AI Assisted Activities

- ☐ Use AI to help draft requirements that map to mission outcomes, but have your team review and refine them to ensure they truly serve user value.
- ☐ Ask AI to generate potential user outcomes for your requirements, then validate each one against direct user feedback and domain knowledge before finalizing.
- ☐ Use AI to help structure your value statements and outcome mappings, but ensure human team members validate that each requirement truly serves the mission before proceeding.
- ☐ Have AI analyze past requirements to identify mission alignment patterns, then use those insights in team discussions to improve how requirements connect to user outcomes.

Evidence of Progress

- ☐ Requirements explicitly state the user/business outcome they serve.
- ☐ Stakeholders agree the acceptance matches the intended outcome.

---

2) Break Down Silos

Clarify scope, rules, and data with all partners early.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Co-author scope with PM/Design/Eng to align boundaries, NFRs, and assumptions.
- ☐ Run a 20-minute joint refinement to clarify business rules, data, and edge cases; document in the ticket.
- ☐ Pair with QA to turn acceptance into testable scenarios and data sets for this story.
- ☐ Sit with Dev/Designer to review flow and data contracts; capture decisions immediately.
- ☐ Host a quick dependency check across upstream/downstream systems that this requirement touches.

AI Assisted Activities

- ☐ When AI generates requirements or acceptance criteria, have cross-functional team members (PM, design, engineering, QA) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft requirement documents or refinement notes, but ensure all roles contribute their perspectives during the actual refinement sessions.
- ☐ Have AI analyze requirement patterns and handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure requirement collaboration sessions, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Fewer rework/clarification cycles on the stories you refined jointly.
- ☐ Acceptance criteria are testable and reflect shared decisions.

---

3) User Engagement

Ground requirements in observed user behavior and pain.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Shadow a user or support session tied to this requirement; list one requirement tweak you will make.
- ☐ Collect three verbatim user quotes for this feature and add them to the backlog item.
- ☐ Convert a top complaint into a concrete scenario and acceptance criterion.
- ☐ Validate one key assumption with a user-facing role (support/sales/CSM) before finalizing acceptance.
- ☐ Review analytics/logs for the affected journey and adjust requirements to reflect real behavior.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for requirements, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your requirement assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for requirement writing, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from analytics, then discuss those patterns with actual users to understand the "why" behind the behavior before writing requirements.

Evidence of Progress

- ☐ Requirements include user quotes or observed behaviors.
- ☐ Assumptions are validated before build, reducing late changes.

---

4) Outcomes Over Outputs

Define measurable outcomes and plan to verify them.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Define a measurable business/user outcome for this feature and add it to the ticket.
- ☐ Specify one leading indicator and how/when it will be measured before build starts.
- ☐ After release, compare expected vs. actual and propose a follow-up change if needed.
- ☐ Add acceptance that includes a data/telemetry hook to observe the outcome.
- ☐ Create a short outcome readout linking this requirement to the metric it moved (or didn't).

AI Assisted Activities

- ☐ When AI generates requirements or feature descriptions, define outcome metrics upfront and measure whether AI-generated requirements achieve intended user outcomes, not just feature completion.
- ☐ Use AI to help analyze requirement outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for requirements, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on requirement outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust requirements based on observed impact.

Evidence of Progress

- ☐ Each requirement has a stated outcome and measurement plan.
- ☐ Post-release readouts drive scope adjustments based on data.

---

5) Domain Knowledge

Capture ecosystem, policy, and data constraints clearly.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Map the process flow (front/back stage) showing systems/owners this requirement touches; highlight risks.
- ☐ Identify policy/compliance constraints and add them explicitly to acceptance.
- ☐ Confirm data definitions and sources with data/PM before finalizing the requirement.
- ☐ Review a past incident/defect in this domain and add a guardrail or check to this story.
- ☐ Meet a domain SME to validate edge cases and record decisions in the ticket.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, policy requirements, or data constraints for requirement writing, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your requirements, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft process flows or ecosystem maps for requirements, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past requirements or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Requirements list constraints, owners, and risks explicitly.
- ☐ Data and policy assumptions are validated before build.

---

6) The Art of Storytelling

Explain requirements as stories of user and business value.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Write a one-page narrative: user, problem, business value, success signal for this feature.
- ☐ Prepare two updates: one for execs/stakeholders (value, risk) and one for the squad (rules, edge cases).
- ☐ Add a before/after vignette to the requirement to align design/eng/QA.
- ☐ Include a user quote and a target metric in your summary to make it tangible.
- ☐ Record a 60-second walkthrough of the requirement as a user story and share it with the team.

AI Assisted Activities

- ☐ Use AI to help structure or draft requirement narratives and feature stories, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of requirement explanations for different audiences (technical peers vs stakeholders), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize requirement work in reviews, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft requirement documentation or feature descriptions, but always include real user quotes, data points, or anecdotes that connect your requirement work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell the value story and success signals.
- ☐ The squad can articulate rules and edge cases consistently.

WORKBOOK

Make the Mission Yours

Role: **Project Manager**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Keep the mission visible in plans and status.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Add mission and top outcomes to the header of the project plan and status updates.
- ☐ For each milestone, state the user/business outcome it supports.
- ☐ Open weekly status with mission/outcome progress before dates.
- ☐ Require each new dependency/risk to note which outcome it threatens.
- ☐ At mid-iteration, restate the mission and outcomes and adjust scope if drifted.

AI Assisted Activities

- ☐ Use AI to help draft project plans that map to mission outcomes, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential user outcomes for your project milestones, then validate each one against direct user feedback and domain knowledge before committing.
- ☐ Use AI to help structure your mission/outcome mappings in project plans, but ensure human team members validate that each milestone truly serves the mission before proceeding.
- ☐ Have AI analyze past project plans to identify mission alignment patterns, then use those insights in team discussions to improve how projects connect to user outcomes.

Evidence of Progress

- ☐ Stakeholders see mission/outcomes in every status deck.
- ☐ Milestones are described with outcomes, not only dates.

---

2) Break Down Silos

Coordinate cross-functional work around shared context.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Create one integrated plan combining design/eng/QA tasks against shared milestones.
- ☐ Host a 15-minute weekly dependency review with all owners; log decisions.
- ☐ Replace function-specific boards with one shared board for the pilot effort.
- ☐ Set one live co-work session this week to unblock a cross-team dependency.
- ☐ Publish a single RACI for the riskiest epic to avoid confusion.

AI Assisted Activities

- ☐ When AI generates project plans or coordination structures, have cross-functional team members review them together to ensure they serve users and enable effective collaboration.
- ☐ Use AI to help draft integrated plans or dependency matrices, but ensure all roles contribute their perspectives during the actual planning sessions.
- ☐ Have AI analyze project communication patterns and dependency friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure project collaboration sessions, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Dependencies are surfaced and resolved earlier.
- ☐ One shared plan/board is used across functions.

---

3) User Engagement

Bake user checkpoints into delivery.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Add a “user validation” checkpoint to the plan for each major milestone.
- ☐ Ensure one user touchpoint is scheduled before calling a feature “done”.
- ☐ Include user feedback highlights in status updates.
- ☐ Pair with PM/UX to confirm which user signal will be read before exiting this milestone.
- ☐ Capture one user quote per milestone and surface it in the next status.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for project planning, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your project assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for project planning, but ensure team members review the summaries and add their own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from telemetry, then discuss those patterns with actual users to understand the "why" behind the behavior before planning milestones.

Evidence of Progress

- ☐ User checkpoints appear on the schedule and are completed.
- ☐ Status updates include user findings, not just % complete.

---

4) Outcomes Over Outputs

Report progress with outcome signals, not only percent complete.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For each milestone, define a simple outcome metric or signal to check post-release.
- ☐ Include an “outcome readout date” in the plan and track it like a deliverable.
- ☐ Close the loop: after readout, adjust scope/plan based on results.
- ☐ Highlight one risk in terms of outcome impact, not just schedule, and secure mitigation.
- ☐ Post a short outcome recap after a release with next-step recommendation.

AI Assisted Activities

- ☐ When AI generates project plans or milestone definitions, define outcome metrics upfront and measure whether AI-generated project work achieves intended user outcomes, not just schedule completion.
- ☐ Use AI to help analyze project outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for project milestones, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on project outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust plans based on observed impact.

Evidence of Progress

- ☐ Status reports show outcome signals alongside schedule.
- ☐ Plans are adjusted based on measured outcomes.

---

5) Domain Knowledge

Track dependencies and constraints that shape delivery.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Maintain a dependency map (front/back stage) with owners and risks; review weekly.
- ☐ List policy/compliance constraints in the plan and confirm with owners.
- ☐ Highlight critical path items tied to external systems and add contingency steps.
- ☐ Review a recent incident/blocked delivery and add one guardrail to the current plan.
- ☐ Confirm SLAs/OLAs with upstream/downstream teams for this sprint's critical path.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, dependency maps, or constraint requirements for project planning, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your projects, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft dependency maps or constraint documentation, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past projects or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Risks/contingencies are tied to specific dependencies and constraints.
- ☐ Owners acknowledge and act on dependency risks early.

---

6) The Art of Storytelling

Tell project status as a story of user value.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Structure status as: user goal, what changed for them, what's next.
- ☐ Create two versions of status: one for execs (outcomes/risks) and one for the team (decisions/blocks).
- ☐ Add a before/after user vignette to major milestone reviews.
- ☐ Include one data point or user quote in every status to anchor the story.
- ☐ Record a 60-second status clip focusing on user value and post it for stakeholders.

AI Assisted Activities

- ☐ Use AI to help structure or draft project status stories and milestone narratives, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of project updates for different audiences (executives vs team), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize project work in status reports, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft project documentation or status updates, but always include real user quotes, data points, or anecdotes that connect your project work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell status in terms of user impact.
- ☐ Teams feel aligned on why milestones matter, not just dates.

WORKBOOK

Make the Mission Yours

Role: **Human-Centered Design Researcher**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Express the mission in user language and evidence.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission as user quotes or needs statements; validate with participants.
- ☐ Align the research plan to the top two mission outcomes; state the decisions it will inform.
- ☐ Create a one-page “user needs” sheet tied to mission outcomes; share with the squad.
- ☐ Before a study, restate the mission outcome you are informing and the decision it will unlock.
- ☐ After a session, tag findings to mission outcomes and flag gaps for the team.

AI Assisted Activities

- ☐ Use AI to help draft research plans that map to mission outcomes, but have your team review and refine them to ensure they reflect real user needs and inform strategic decisions.
- ☐ Ask AI to generate potential research questions based on mission outcomes, then validate each question against direct user feedback and domain knowledge before conducting studies.
- ☐ Use AI to help structure your "user needs" sheets tied to mission outcomes, but ensure human team members validate that each research goal truly serves the mission before proceeding.
- ☐ Have AI analyze past research studies to identify mission alignment patterns, then use those insights in team discussions to improve how research connects to user outcomes.

Evidence of Progress

- ☐ Mission is reflected in user quotes/needs in your briefs.
- ☐ Research goals map to mission outcomes and decisions.

---

2) Break Down Silos

Co-plan and co-synthesize with design/eng/PM.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Co-create the study plan with design/eng to capture feasibility and instrumentation questions.
- ☐ Invite an engineer and designer to observe one session; assign note-taking roles.
- ☐ Run a joint synthesis session to agree on top findings and decisions.
- ☐ Schedule a 15-minute “findings to backlog” pass with PM/eng to place actions.
- ☐ Review one design/eng constraint before finalizing the research scope to avoid rework.

AI Assisted Activities

- ☐ When AI generates research plans or study designs, have cross-functional team members (design, engineering, PM) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft research synthesis notes or findings summaries, but ensure all roles contribute their perspectives during the actual synthesis sessions.
- ☐ Have AI analyze research patterns and handoff friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure research collaboration sessions, but ensure human team members make decisions together about what to research and how it serves users.

Evidence of Progress

- ☐ Eng/design attend sessions and contribute to notes.
- ☐ Findings are co-owned and reflected in backlog items.

---

3) User Engagement

Continuously bring fresh user signal.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Run/observe at least one session weekly; capture clips for the team.
- ☐ Surface the top three findings with timestamps and proposed decisions.
- ☐ Keep a rolling “evidence wall” with quotes/clips linked to open questions.
- ☐ Pair one finding with a proposed product/design/eng action and assign an owner.
- ☐ Spot one risky assumption and design a quick validation this sprint.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for research, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your research assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from your research data, then discuss those patterns with actual users to understand the "why" behind the behavior before finalizing findings.

Evidence of Progress

- ☐ Team decisions reference recent clips/quotes.
- ☐ Backlog items link to specific findings.

---

4) Outcomes Over Outputs

Link findings to behavior change and measurement.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For each key finding, state the expected user behavior change and how to measure it.
- ☐ After a release, run a quick validation (survey/usability) to see if behavior changed.
- ☐ Update the research brief with “what changed because of this finding”.
- ☐ Flag one finding whose expected outcome was not met and propose a follow-up study or design change.
- ☐ Attach a metric or observable signal to at least one finding in your next readout.

AI Assisted Activities

- ☐ When AI generates research findings or analysis summaries, define outcome metrics upfront and measure whether AI-generated insights achieve intended user outcomes, not just research completion.
- ☐ Use AI to help analyze research outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for your research findings, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on research outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust research based on observed impact.

Evidence of Progress

- ☐ Findings include a measurement plan.
- ☐ Post-release validations are documented and fed back to the team.

---

5) Domain Knowledge

Map journeys with front/back stage insights.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Create/refresh a journey map with front/back stage notes from research.
- ☐ Identify domain constraints users mention (policy, process, tools) and share with eng/PM.
- ☐ Highlight where backstage systems fail users in the journey map.
- ☐ Add one “moments that matter” insight from this sprint’s sessions to the journey map.
- ☐ Validate a recurring backstage pain with the owning team and note mitigation options.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, journey maps, or ecosystem insights for research, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your research, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft journey maps or service blueprints, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past research or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Journey maps show backstage pain points and constraints.
- ☐ Engineering/PM reference your maps in planning.

---

6) The Art of Storytelling

Use vivid stories to drive decisions.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Craft a narrative brief with clips and quotes for one key insight; present it in review.
- ☐ Create a before/after storyboard for a target journey.
- ☐ Prepare two story versions: one for execs (impact, risk) and one for the squad (design/eng decisions).
- ☐ Add a 60-second voiceover or Loom to one insight to make it easy to share.
- ☐ End each readout with a clear “so what” and a proposed decision the team should take.

AI Assisted Activities

- ☐ Use AI to help structure or draft research stories and narrative briefs, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of research findings for different audiences (executives vs team), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize research work in presentations, but lead with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft research documentation or findings reports, but always include real user quotes, clips, or anecdotes that connect your research to human impact.

Evidence of Progress

- ☐ Stakeholders recall the story and cite it in decisions.
- ☐ Design/eng act on the storyboarded changes.

WORKBOOK

Make the Mission Yours

Role: **HCD Designer**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Design with the mission visible in every flow.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Annotate each flow with the mission outcome it supports and the user behavior it should change.
- ☐ Create a mini “intent” note for the next design: user, problem, outcome, signal.
- ☐ Review designs with the team and confirm the mission tie before handoff.
- ☐ Highlight in the spec which design decision most directly advances the mission outcome.
- ☐ In design crit, ask for one challenge on whether the flow truly supports the stated outcome.

AI Assisted Activities

- ☐ Use AI to help draft design flows that map to mission outcomes, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential design approaches based on mission outcomes, then validate each approach against direct user feedback and usability testing before finalizing.
- ☐ Use AI to help structure your design intent notes tied to mission outcomes, but ensure human team members validate that each design truly serves the mission before handoff.
- ☐ Have AI analyze past designs to identify mission alignment patterns, then use those insights in team discussions to improve how design connects to user outcomes.

Evidence of Progress

- ☐ Designs show explicit mission/outcome annotations.
- ☐ Team can point to which outcome a flow supports.

---

2) Break Down Silos

Co-design with engineering and QA to de-risk.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Run a joint design/eng/QA review to identify feasibility and test hooks before finalizing.
- ☐ Pair with QA to define UX acceptance criteria and test data for this flow.
- ☐ Share a quick design intent Loom and tag dev/QA with open questions.
- ☐ Sit with a developer for 15 minutes to walk through edge states and reduce ambiguity.
- ☐ Agree with eng on a “good/better/best” version to handle constraints without blocking delivery.

AI Assisted Activities

- ☐ When AI generates design mockups or interface designs, have cross-functional team members (engineering, QA, PM) review them together to ensure they serve users and integrate well.
- ☐ Use AI to help draft design specs or UX acceptance criteria, but ensure all roles contribute their perspectives during the actual design review sessions.
- ☐ Have AI analyze design handoff patterns and integration friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure design collaboration sessions, but ensure human team members make decisions together about what to design and how it serves users.

Evidence of Progress

- ☐ Fewer design/eng mismatches during build.
- ☐ UX acceptance criteria appear in stories/tests.

---

3) User Engagement

Validate continuously with users.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Test one flow with users weekly; log observations and share with dev/QA.
- ☐ Turn one top user pain into a design experiment and run a quick test.
- ☐ Invite an engineer to observe a test and discuss feasibility adjustments live.
- ☐ Capture one verbatim user quote about the flow and include it in the design spec.
- ☐ Pair with PM/support to validate a user assumption before finalizing the flow.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usability data to identify patterns for design, but always validate AI insights through direct user observation or usability testing.
- ☐ Have AI generate questions for user interviews based on your design assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for design, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from usability testing, then discuss those patterns with actual users to understand the "why" behind the behavior before finalizing designs.

Evidence of Progress

- ☐ Design tweaks trace to specific user observations.
- ☐ Engineers reference usability learnings while building.

---

4) Outcomes Over Outputs

Define UX success signals and measure them.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For the next flow, define success signals (task success, time, satisfaction) and how to capture them.
- ☐ After release, review those signals and suggest the next design iteration.
- ☐ Add a “desired behavior change” line to the design spec.
- ☐ Align with analytics/QA on the exact events or heuristics that represent UX success.
- ☐ If a signal misses, propose a specific design tweak and test it quickly.

AI Assisted Activities

- ☐ When AI generates design flows or interface designs, define UX outcome metrics upfront and measure whether AI-generated designs achieve intended user outcomes, not just visual completion.
- ☐ Use AI to help analyze UX outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft UX outcome definitions and success criteria for your designs, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on UX outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust designs based on observed impact.

Evidence of Progress

- ☐ Released flows have measured UX signals.
- ☐ Design iterations reference measured behaviors.

---

5) Domain Knowledge

Design with awareness of backstage systems and constraints.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Create a service blueprint showing UI touchpoints and backstage systems for your flow.
- ☐ Note domain constraints (policy/data) in the design spec and review with eng.
- ☐ Highlight where backstage limitations might surface in the UI and propose mitigations.
- ☐ Call out data/latency/error expectations in the spec so UI can handle them gracefully.
- ☐ Review one past incident tied to UX/backstage and add a guardrail to this flow.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, service blueprints, or constraint requirements for design, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your designs, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft service blueprints or journey maps, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past designs or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Design specs call out constraints and backstage dependencies.
- ☐ Backstage constraints are addressed in design solutions or mitigations.

---

6) The Art of Storytelling

Use visuals and narratives to align the team.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Create a before/after storyboard for a key journey and present it at review.
- ☐ Prepare two versions of a design walkthrough: one for stakeholders (impact/outcomes) and one for engineers (flows/states).
- ☐ Add a user quote to each major screen explaining the pain it solves.
- ☐ Record a 60-second voiceover of the flow tying screens to user impact.
- ☐ Show one metric or observable signal in the walkthrough to link design to outcomes.

AI Assisted Activities

- ☐ Use AI to help structure or draft design stories and storyboards, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of design walkthroughs for different audiences (stakeholders vs engineers), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize design work in reviews, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft design documentation or storyboards, but always include real user quotes, clips, or anecdotes that connect your design work to human impact.

Evidence of Progress

- ☐ Stakeholders and engineers can retell the story of the flow.
- ☐ Storyboards are referenced during build and QA.

WORKBOOK

Make the Mission Yours

Role: **Policy Analyst**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Translate policy goals into user-centered mission statements.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite a policy objective as a user need and desired outcome.
- ☐ Align with PM/Eng on which user journeys the policy affects.
- ☐ Summarize the mission impact of a policy in one paragraph for the team.
- ☐ Tag the current policy item with the specific user risk it mitigates and the success signal.
- ☐ Validate your rewrite with a business/ops stakeholder and capture their wording for the team.

AI Assisted Activities

- ☐ Use AI to help draft policy objectives that map to mission outcomes, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential user outcomes for your policy work, then validate each one against direct user feedback and domain knowledge before finalizing.
- ☐ Use AI to help structure your policy-to-mission mappings, but ensure human team members validate that each policy truly serves the mission before implementing.
- ☐ Have AI analyze past policy work to identify mission alignment patterns, then use those insights in team discussions to improve how policy connects to user outcomes.

Evidence of Progress

- ☐ Product briefs include user-centered policy intent.
- ☐ Team can state which journeys the policy affects.

---

2) Break Down Silos

Collaborate early to embed policy in design/build.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Join a feature kickoff to outline policy constraints and acceptable options.
- ☐ Co-review policy impacts with PM/Design/Eng and document agreed interpretations.
- ☐ Create a short FAQ for policy questions and share with the squad.
- ☐ Run a 15-minute edge-case alignment with design/eng on exceptions and who decides.
- ☐ Review copy/UX for policy-driven steps and propose clearer language or flow for users.

AI Assisted Activities

- ☐ When AI generates policy guidance or compliance requirements, have cross-functional team members (PM, design, engineering) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft policy FAQs or guidance documents, but ensure all roles contribute their perspectives during the actual policy review sessions.
- ☐ Have AI analyze policy handoff patterns and compliance gaps, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure policy collaboration sessions, but ensure human team members make decisions together about what to implement and how it serves users.

Evidence of Progress

- ☐ Policy considerations appear in design/eng notes before build.
- ☐ Fewer late-stage policy blockers.

---

3) User Engagement

See how policy shows up for users.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Observe a user interaction where policy applies; note friction or clarity.
- ☐ Collect three user quotes about how a policy affects their experience.
- ☐ Translate one recurring policy-related support issue into guidance for design/eng.
- ☐ Check with support whether policy wording confuses users; suggest specific alternatives.
- ☐ Identify one policy step that adds friction and draft a mitigation (content, flow, tooling) with the team.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or compliance data to identify patterns for policy work, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your policy assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings related to policy, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from policy-related telemetry, then discuss those patterns with actual users to understand the "why" behind policy friction before implementing changes.

Evidence of Progress

- ☐ Policy guidance includes user quotes/examples.
- ☐ Support issues tied to policy are addressed in product changes.

---

4) Outcomes Over Outputs

Measure policy impact on compliance and user experience.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Define one compliance and one UX outcome for a policy change.
- ☐ After release, review incidents/violations and user feedback related to the policy.
- ☐ Propose an iteration if outcomes are off (e.g., too much friction, gaps in compliance).
- ☐ Set a readout date to check both compliance and usability signals post-release.
- ☐ If friction is high, propose a specific change (content, UX, support) with the owning team.

AI Assisted Activities

- ☐ When AI generates policy requirements or compliance frameworks, define outcome metrics upfront and measure whether AI-generated policy work achieves intended user outcomes, not just compliance completion.
- ☐ Use AI to help analyze policy outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft policy outcome definitions and success criteria, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on policy outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust policy based on observed impact.

Evidence of Progress

- ☐ Policy changes have outcome measures, not just checkboxes.
- ☐ Iterations are proposed based on compliance + UX evidence.

---

5) Domain Knowledge

Map policy to the service ecosystem.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Map policy requirements onto a service map: front/back stage impacts and owners.
- ☐ Identify data/consent/retention rules and where they apply in the flow.
- ☐ Document edge cases and who decides on exceptions.
- ☐ Confirm with data/engineering how policy is enforced at integration points for this release.
- ☐ Review one past policy-related incident and list a guardrail to apply now.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, service maps, or policy requirements, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or ecosystem relationships for your policy work, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft service maps or policy documentation, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past policy work or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Service maps show policy touchpoints and owners.
- ☐ Edge cases/exception paths are documented and owned.

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6) The Art of Storytelling

Explain policy as protecting people and mission.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Write a short user story showing how policy protects or enables the user.
- ☐ Create two summaries of a policy change: one plain-language for users/stakeholders, one detailed for eng.
- ☐ Use a before/after vignette to illustrate reduced risk or improved fairness.
- ☐ Add one concrete scenario (with data/quote) to make the policy rationale memorable.
- ☐ Record a 60-second explainer on how this policy change reduces user or organizational risk.

AI Assisted Activities

- ☐ Use AI to help structure or draft policy stories and explanations, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of policy explanations for different audiences (stakeholders vs engineers), but ensure each version includes authentic human stories about real user protection.
- ☐ Use AI to help summarize policy work in presentations, but lead with human stories about real users protected by policy, using AI-generated summaries as supporting material.
- ☐ Have AI help draft policy documentation or guidance, but always include real user quotes, data points, or anecdotes that connect your policy work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell the user story behind the policy.
- ☐ Eng understands the rationale and user impact, not just the rule.

WORKBOOK

Make the Mission Yours

Role: **Data Analyst**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Align every analysis to mission questions.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Add a “mission question” line to each analysis request/output.
- ☐ Prioritize metrics that reflect user outcomes; demote vanity metrics.
- ☐ Validate with PM/Eng that your current sprint questions align to outcomes.
- ☐ Rewrite one request that is vague into a clear mission/outcome question and confirm it.
- ☐ Pin a mission metric at the top of your next report and explain its relevance.

AI Assisted Activities

- ☐ Use AI to help draft analysis frameworks that map to mission outcomes, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential analysis questions based on mission outcomes, then validate each question against direct user feedback and domain knowledge before conducting analysis.
- ☐ Use AI to help structure your mission-aligned analyses, but ensure human team members validate that each analysis truly serves the mission before proceeding.
- ☐ Have AI analyze past analyses to identify mission alignment patterns, then use those insights in team discussions to improve how data work connects to user outcomes.

Evidence of Progress

- ☐ Analyses start with a mission question.
- ☐ Metrics reviewed in rituals tie to user/business outcomes.

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2) Break Down Silos

Define data needs jointly with builders.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Run a tracking plan session with PM/Eng before build; publish events/specs.
- ☐ Sync with QA to validate data capture in staging before launch.
- ☐ Hold a 15-minute “data readiness” check before release.
- ☐ Pair with a developer to confirm event payloads and edge cases for this release.
- ☐ Replace a metric-definition thread with a live alignment and update the dictionary.

AI Assisted Activities

- ☐ When AI generates tracking plans or data specifications, have cross-functional team members (PM, engineering, QA) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft data dictionaries or tracking designs, but ensure all roles contribute their perspectives during the actual tracking design sessions.
- ☐ Have AI analyze data handoff patterns and metric gaps, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure data collaboration sessions, but ensure human team members make decisions together about what to measure and how it serves users.

Evidence of Progress

- ☐ Fewer missing events post-release.
- ☐ QA sign-off includes data validation.

---

3) User Engagement

Ground numbers in observed user behavior.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Shadow a support/sales call; extract behaviors to watch in data.
- ☐ Pair a usability test with a metric you own; reconcile observation vs. data.
- ☐ Translate one top user pain into a measurable funnel/metric.
- ☐ Add one user quote to your next chart to anchor the behavior you're measuring.
- ☐ Validate a surprising trend by contacting support/PM for qualitative context.

AI Assisted Activities

- ☐ Use AI to analyze user feedback, support tickets, or usage data to identify patterns for analysis, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user interviews based on your data assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user research findings for analysis, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from your data, then discuss those patterns with actual users to understand the "why" behind the behavior before finalizing analysis.

Evidence of Progress

- ☐ Dashboards include context from user observations.
- ☐ A new metric/funnel comes directly from qualitative insight.

---

4) Outcomes Over Outputs

Deliver readouts that drive decisions.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ For each release, publish a one-page outcome readout with a decision/recommendation.
- ☐ Flag when outcomes did not move; propose a hypothesis and next test.
- ☐ Maintain a decision log tied to your analyses.
- ☐ Create two versions of the readout (exec and squad) and share both.
- ☐ If the outcome missed, propose one follow-up experiment with timing.

AI Assisted Activities

- ☐ When AI generates analysis reports or outcome readouts, define outcome metrics upfront and measure whether AI-generated insights achieve intended user outcomes, not just data completeness.
- ☐ Use AI to help analyze outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft outcome definitions and success criteria for your analyses, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust analysis based on observed impact.

Evidence of Progress

- ☐ Decisions reference your readouts and hypotheses.
- ☐ Outcome gaps lead to follow-up experiments, not speculation.

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5) Domain Knowledge

Know the data ecosystem and its constraints.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Document lineage and quality for one key metric; share caveats.
- ☐ Map front/back stage data sources for a core journey and note trust levels.
- ☐ Review regulatory/PII constraints with security and reflect in dashboards.
- ☐ Identify the riskiest upstream source and add a monitor or caveat to your report.
- ☐ Meet briefly with a domain owner to confirm assumptions on a metric for this sprint.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, data lineage, or privacy constraints for analysis, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or data ecosystem relationships, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft data lineage maps or metric definitions, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past analyses or domain-related data issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Metric definitions include lineage, quality, and privacy notes.
- ☐ Stakeholders understand data trust boundaries.

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6) The Art of Storytelling

Package insights as compelling, usable stories.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Deliver one key finding as a user story with a chart and a quote.
- ☐ Create two versions of a dashboard/slide: exec (outcomes/actions) and squad (details/next tests).
- ☐ Frame a trend as a before/after narrative tied to a release or change.
- ☐ Add a user verbatim to one slide to anchor the metric to real people.
- ☐ Record a 60-second walkthrough of a chart explaining what changed and what to do next.

Evidence of Progress

- ☐ Stakeholders accurately retell your finding.
- ☐ Teams take concrete actions from your story-backed insight.

WORKBOOK

Make the Mission Yours

Role: **Data Engineer**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

> ⚠️ **Important: When Using AI Tools**
>
> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

State how pipelines support mission outcomes.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Add “mission/outcome supported” to one pipeline runbook (e.g., supports activation metric).
- ☐ Review with PM/Analyst which outcomes depend on your datasets this sprint.
- ☐ For a new table, document the user/business question it enables.
- ☐ Tag one in-flight task with the mission metric it supports and the consumer who needs it.
- ☐ Explain in standup how a current pipeline change advances a specific user/business outcome.

AI Assisted Activities

- ☐ Use AI to help draft data pipeline documentation that maps to mission outcomes, but have your team review and refine it to ensure it reflects real user needs and business goals.
- ☐ Ask AI to generate potential data pipeline improvements based on mission outcomes, then validate each one against direct user feedback and domain knowledge before implementing.
- ☐ Use AI to help structure your pipeline runbooks tied to mission outcomes, but ensure human team members validate that each pipeline truly serves the mission before deploying.
- ☐ Have AI analyze past data pipeline work to identify mission alignment patterns, then use those insights in team discussions to improve how data infrastructure connects to user outcomes.

Evidence of Progress

- ☐ Pipelines are described by the outcomes they serve.
- ☐ Analysts/PMs acknowledge alignment to their questions.

---

2) Break Down Silos

Co-own contracts and data readiness.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Define data contracts with upstream/downstream owners before changes.
- ☐ Hold a joint schema review with analysts and QA for a new dataset.
- ☐ Add data validation steps that QA can see before launch.
- ☐ Pair with a downstream consumer to confirm fields, semantics, and edge cases.
- ☐ Schedule a quick “data readiness” check for the release and publish the results.

AI Assisted Activities

- ☐ When AI generates data schemas or pipeline designs, have cross-functional team members (analysts, QA, PM) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft data contracts or schema documentation, but ensure all roles contribute their perspectives during the actual schema review sessions.
- ☐ Have AI analyze data handoff patterns and schema friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure data collaboration sessions, but ensure human team members make decisions together about what to build and how it serves users.

Evidence of Progress

- ☐ Fewer breaking changes for downstream consumers.
- ☐ Schema/contract is agreed before build; validation catches issues early.

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3) User Engagement

See how data is consumed in real workflows.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Attend an analytics or ops review to watch how data is used for decisions.
- ☐ Interview a consumer (analyst/PM/support) about pain points with current data.
- ☐ Instrument one pipeline to surface usage/quality signals to consumers.
- ☐ Shadow a consumer building a report; note friction and adjust schema/docs.
- ☐ Share one consumer quote about data pain with the team and propose a fix.

AI Assisted Activities

- ☐ Use AI to analyze consumer feedback, usage data, or quality metrics to identify patterns for data pipeline work, but always validate AI insights through direct consumer engagement or observation.
- ☐ Have AI generate questions for consumer interviews based on your data assumptions, then use those questions in real conversations with data consumers to build genuine empathy.
- ☐ Use AI to help summarize consumer research findings for data pipeline planning, but ensure you review the summaries and add your own observations from direct consumer interactions.
- ☐ Have AI analyze consumer behavior patterns from data usage telemetry, then discuss those patterns with actual consumers to understand the "why" behind the behavior before making pipeline changes.

Evidence of Progress

- ☐ You addressed a consumer pain point with a data change or documentation.
- ☐ Consumers see quality/usage signals and respond to them.

---

4) Outcomes Over Outputs

Measure data work by quality and impact on decisions.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Track a quality/SLA metric for a critical dataset (freshness, completeness) and share weekly.
- ☐ After a change, report before/after on errors or trust signals.
- ☐ Tie one data improvement to a downstream decision it unlocked.
- ☐ If quality missed, propose a concrete fix (contract, validation, retry) and schedule it.
- ☐ Add a “post-release data check” to confirm the intended decision-maker can use the data.

AI Assisted Activities

- ☐ When AI generates data pipelines or infrastructure code, define data quality outcome metrics upfront and measure whether AI-generated pipelines achieve intended user outcomes, not just technical completion.
- ☐ Use AI to help analyze data quality outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft data quality outcome definitions and success criteria, but ensure the team validates them against real user needs and business goals before deploying.
- ☐ Use AI to track and report on data quality outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust pipelines based on observed impact.

Evidence of Progress

- ☐ Quality metrics are visible and trending in the right direction.
- ☐ Downstream teams cite your change as enabling a decision.

---

5) Domain Knowledge

Map data across the service ecosystem.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Map front/back stage data flows for a core journey; mark weakest links and owners.
- ☐ Identify regulatory/PII constraints per table and add to docs.
- ☐ Note which upstream systems most affect data quality and agree on monitoring with owners.
- ☐ Review a past data incident for this domain and add one guardrail to current work.
- ☐ Verify one critical upstream dependency this sprint and log the contact/contract in docs.

AI Assisted Activities

- ☐ Use AI to help summarize domain documentation, data lineage, or ecosystem constraints for data pipeline work, but validate AI-generated domain knowledge through direct engagement with domain experts.
- ☐ Have AI generate questions about domain constraints or data ecosystem relationships, then use those questions in conversations with domain experts to build deep understanding.
- ☐ Use AI to help draft data flow maps or ecosystem diagrams, but ensure team members review them with domain experts to verify accuracy and completeness.
- ☐ Have AI analyze past data pipeline work or domain-related issues, then discuss those insights with the team and domain experts to identify patterns and prevent similar problems.

Evidence of Progress

- ☐ Data docs show constraints, ownership, and weak links.
- ☐ Monitors/alerts exist for the riskiest upstream dependencies.

---

6) The Art of Storytelling

Explain data work as user/business value.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Describe a data fix as a user-impact story (e.g., “more accurate billing for customers because…”).
- ☐ Create two summaries of a pipeline change: one for engineers (lineage, tests) and one for stakeholders (decisions it enables).
- ☐ Show a before/after chart of data quality with the decision it unlocked.
- ☐ Add a consumer quote to your update about how the change helps them decide faster/better.
- ☐ Record a 60-second explainer of a pipeline change focusing on who benefits and how.

AI Assisted Activities

- ☐ Use AI to help structure or draft data pipeline stories and documentation, but refine them with real consumer anecdotes, emotions, and personal observations from direct consumer interactions.
- ☐ Have AI generate different versions of data pipeline updates for different audiences (engineers vs stakeholders), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize data pipeline work in presentations, but lead with human stories about real consumers, using AI-generated summaries as supporting material.
- ☐ Have AI help draft data pipeline documentation or updates, but always include real consumer quotes, data points, or anecdotes that connect your data work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell why a data change mattered.
- ☐ Consumers trust and use the improved data for decisions.

WORKBOOK

Make the Mission Yours

Role: **Customer Support**

Use these activities to apply each principle to your current product, service, or project. These activities are a sample to get you started, not an exhaustive list. Adapt and expand them based on your team's context and needs. Capture your answers, share them with your team, and revisit them as you learn.

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> When using AI-assisted activities, always double-check for accuracy and meaning each and every time. AI tools can help accelerate your work, but human judgment, validation, and critical thinking remain essential.
>
> Review AI-generated content with your team, validate it against real user feedback and domain knowledge, and ensure it truly serves your mission and user outcomes before proceeding.

1) Shared Mission and Vision

Frame support work in mission terms.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **1) Shared Mission and Vision** section in the framework.

Workbook Activities (do now)

- ☐ Rewrite the mission in terms of the top support themes you see.
- ☐ Tag the top three ticket categories to the user outcomes they block.
- ☐ Share a weekly note: which outcome was most impacted by support issues.
- ☐ Annotate one current hot ticket type with the mission risk and desired user outcome.
- ☐ Align with PM on which user outcomes your insights this week should influence.

AI Assisted Activities

- ☐ Use AI to help draft support summaries that map to mission outcomes, but have your team review and refine them to ensure they reflect real user needs and business goals.
- ☐ Ask AI to generate potential user outcomes from support ticket patterns, then validate each one against direct user feedback and domain knowledge before escalating.
- ☐ Use AI to help structure your support insights tied to mission outcomes, but ensure human team members validate that each insight truly serves the mission before sharing.
- ☐ Have AI analyze past support insights to identify mission alignment patterns, then use those insights in team discussions to improve how support connects to user outcomes.

Evidence of Progress

- ☐ Support summaries reference mission/outcomes.
- ☐ Product sees clear linkage between tickets and user outcomes.

---

2) Break Down Silos

Feed frontline insights directly into build/QA/design.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **2) Break Down Silos** section in the framework.

Workbook Activities (do now)

- ☐ Join a sprint planning or review to present top recurring issues and examples.
- ☐ Create a “support ready” checklist for new releases (known issues, macros, comms).
- ☐ Pair with QA to turn a top recurring ticket into a regression test.
- ☐ Share a short Loom/walkthrough of a high-volume issue to design/eng with repro steps.
- ☐ Replace one long email thread with a live 10-minute sync to agree on a fix path for a top issue.

AI Assisted Activities

- ☐ When AI generates support summaries or issue reports, have cross-functional team members (PM, design, engineering, QA) review them together to ensure they serve users and align with mission.
- ☐ Use AI to help draft support-ready checklists or documentation, but ensure all roles contribute their perspectives during the actual planning sessions.
- ☐ Have AI analyze support handoff patterns and issue escalation friction, then use those insights in cross-functional discussions to improve collaboration.
- ☐ Use AI to help structure support collaboration sessions, but ensure human team members make decisions together about what to fix and how it serves users.

Evidence of Progress

- ☐ Recurring issues are reflected in backlog/regression tests.
- ☐ Releases include support-ready comms/macros.

---

3) User Engagement

Bring authentic user voice to the team.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **3) User Engagement** section in the framework.

Workbook Activities (do now)

- ☐ Tag the top pain points with short narratives and user quotes; share weekly.
- ☐ Record (or summarize) a representative call and share a 2-minute clip/summary.
- ☐ Identify one quick product/content fix per week from tickets and propose it.
- ☐ Collect three verbatim quotes for the highest-volume issue and share with design/PM.
- ☐ Pair with a PM/Designer to validate wording or flows that drive confusion and suggest edits.

AI Assisted Activities

- ☐ Use AI to analyze support tickets, user feedback, or call transcripts to identify patterns, but always validate AI insights through direct user engagement or observation.
- ☐ Have AI generate questions for user follow-ups based on your support assumptions, then use those questions in real conversations with users to build genuine empathy.
- ☐ Use AI to help summarize user pain points from support interactions, but ensure you review the summaries and add your own observations from direct user interactions.
- ☐ Have AI analyze user behavior patterns from support data, then discuss those patterns with actual users to understand the "why" behind the issues before escalating.

Evidence of Progress

- ☐ Team references your user quotes/clips in planning.
- ☐ At least one fix per sprint is sourced from support insights.

---

4) Outcomes Over Outputs

Track support impact on outcomes, not just volume.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **4) Outcomes Over Outputs** section in the framework.

Workbook Activities (do now)

- ☐ Pick one outcome metric (e.g., repeat contacts, time to resolve) tied to product issues; track weekly.
- ☐ After a product fix, measure the change in that support metric.
- ☐ Flag when support volume signals a missed outcome and escalate with data.
- ☐ Post a short readout after a fix lands: trend of the metric and remaining gaps.
- ☐ If the outcome didn't move, propose a specific product/help content change.

AI Assisted Activities

- ☐ When AI generates support reports or outcome summaries, define outcome metrics upfront and measure whether AI-generated insights achieve intended user outcomes, not just ticket resolution.
- ☐ Use AI to help analyze support outcome data and identify patterns, but have human team members interpret what those patterns mean for users and the mission.
- ☐ Have AI help draft support outcome definitions and success criteria, but ensure the team validates them against real user needs and business goals before proceeding.
- ☐ Use AI to track and report on support outcome metrics, but schedule human team reviews to discuss what the metrics mean and how to adjust support processes based on observed impact.

Evidence of Progress

- ☐ Support reports show outcome metrics tied to product fixes.
- ☐ Product changes correlate with improved support outcomes.

---

5) Domain Knowledge

Map where support issues originate in the ecosystem.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **5) Domain Knowledge** section in the framework.

Workbook Activities (do now)

- ☐ Map which back-stage systems drive your top support categories; note owners.
- ☐ Highlight the most failure-prone steps in the user journey from tickets.
- ☐ Share a simple service map with “hot spots” from support volume.
- ☐ Meet briefly with an owner of a hot spot system to confirm the top pain and possible fixes.
- ☐ Review a past high-severity issue and add one warning/guardrail to current support playbooks.

Evidence of Progress

- ☐ Engineering sees a clear map of where support pain originates.
- ☐ Hot spots are acknowledged and scheduled for improvement.

---

6) The Art of Storytelling

Tell user stories that motivate fixes.

> 💡 **Learn More**
>
> For more information and deeper understanding of this principle, refer to the **6) The Art of Storytelling** section in the framework.

Workbook Activities (do now)

- ☐ Tell a “ticket to resolution” story: user impact → root cause → fix → outcome; share in review.
- ☐ Prepare two summaries of top issues: one for execs (impact/trend) and one for the squad (specifics/repro).
- ☐ Share a before/after vignette when a fix lands, highlighting the user benefit.
- ☐ Include one customer quote or screenshot in your summary to make the pain real.
- ☐ Record a 60-second clip walking through a top issue and why it matters to users.

AI Assisted Activities

- ☐ Use AI to help structure or draft support stories and issue summaries, but refine them with real user anecdotes, emotions, and personal observations from direct user interactions.
- ☐ Have AI generate different versions of support issue summaries for different audiences (executives vs team), but ensure each version includes authentic human stories about real user impact.
- ☐ Use AI to help summarize support work in reviews, but lead presentations with human stories about real users, using AI-generated summaries as supporting material.
- ☐ Have AI help draft support documentation or issue reports, but always include real user quotes, data points, or anecdotes that connect your support work to human impact.

Evidence of Progress

- ☐ Stakeholders can retell the user stories behind top issues.
- ☐ Fixes are prioritized with clear user-impact stories from support.
