

Decision Workbook

Behavior choices and test plans

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How to use this document

Use the eight numbered sections to record a behavior choice, its evidence, a realistic test, and a supported next decision. The blank cells are intentional writing space. Expand them in Word or use an additional sheet when needed.

The three companion files are Decision Workbook, Student Casebook, and Facilitator Guide. Their PDFs and editable Word versions share those names. Use the student material before opening worked responses. Source URLs are reference links; the printed instructions and fictional records support offline practice.

Public facts, participant recollections, instructor analysis, proposed tests, and invented observations are labelled separately. No featured organization is claimed to have used DRIVE, BMF, or BFA. No participant study or independent validation of this teaching pack is reported.

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1. Decision Workbook

References and online companions

Workbook instructions

Purpose. This workbook turns a public case or a practical problem into a recorded behavior choice, a realistic test, and a next decision that matches the evidence.

Choose a packet: [M-PESA](#) [1], [Instagram](#) [2], or [GOV.UK Verify](#) [3]. Keep your initial response before opening its worked analysis. Recognizing the company does not prevent practice; explain your choice using the packet's evidence.

Download the [printable workbook](#) [4] or [editable Word workbook](#) [5]. The fields below are the same eight sections. Copy them into a document if you prefer to work there.

Suggested standalone time: 40 minutes. The section times are instructional estimates, not measured completion times. A workshop host can spread the sections across a longer discussion. Complete one row or short paragraph per prompt; expand only where the decision needs it.

Record before starting: your name or team label, date, case, source cutoff, and the practical decision you are making. Mark entries as public fact, reported experience, instructor analysis, your inference, or fictional assumption. A later published account of an earlier event remains a later source.

The examples throughout use an **invented shift-handover service**. Its conditions, thresholds, and choices are teaching examples. They are not company data or a completed study.

1 Define the outcome

Suggested time: 4 minutes.

Record	Your entry
Useful outcome and whose problem it resolves	
Observable action that might contribute	
Feature or service that might enable it	
Reason the action could produce the outcome	
What would show that this link is wrong or incomplete	

Worked example. The outcome is that incoming staff know who owns unfinished work. The action is a prepared handover acknowledged by the incoming lead. The feature is a shared form. Acknowledgement without correct task ownership could satisfy an interface metric while failing the outcome.

Check: Can another person distinguish what people do from what you build and what you hope improves?

2 Compare candidate actions

Suggested time: 5 minutes.

Write each candidate as **actor + observable action + context/opportunity + deadline + support**. Include the current workaround and a route that reduces user work.

Candidate	Full action statement	Expected benefit	Work removed or added; for whom
A			
B			
C, including a less-user-work challenger			
Current route or workaround			

Worked example. A: both leads exchange a written handover. B: they hold a brief discussion and record unresolved items. C: existing task records generate a draft that the leads check and acknowledge. C reduces writing but adds dependence on correct records and review. These are alternative service routes, not observed preferences.

Check: Are the candidates materially different actions? Renaming the button or changing its color is a change within a route.

3 Map actors and support

Suggested time: 5 minutes.

Step and actor	Required action or handoff	Prerequisite	Completion evidence	Fallback if it fails

Add rows until the useful service is complete. Include off-platform work, people who authorize access, recipients, and staff who repair errors.

Support question	Your entry
Normal support the intended service will supply	
Exceptional help a trial might accidentally supply	
Staff work and cost, including failed attempts	
Peak demand, available capacity, and possible waiting	
Evidence or assumption supporting those capacity estimates	

Worked example. Updating a task record, writing the handover, resolving an unclear owner, and acknowledging receipt require different work. A researcher who repairs every unclear owner creates exceptional support. A planned supervisor review can be normal support if its time and capacity are included in the service.

Check: Have you removed work, or transferred it to another person or system?

4 Compare the evidence

Suggested time: 5 minutes.

Candidate	Supporting observation and source	Contradictory evidence	Unknown	Finding that would change your ranking
A				
B				
C				

For each serious candidate, add a short note about **Dispositional Fit** (recurring tendencies and preferences), **Capability Fit** (abilities, skills, knowledge), and **Context Fit** (external social and physical conditions). State which segment and window each note describes.

Worked example. If a case packet shows inconsistent source records, a generated handover draft has an unresolved input-quality requirement. That does not establish that people dislike the draft or lack the skill to review it. Observe those questions separately.

Check: Can you justify the provisional selection without a total score? Optional BFA ratings organize judgments. They are not probabilities, validated cutoffs, or proof of fit. Leave a gap as unknown rather than assigning a middle score.

Record your provisional choice: chosen candidate, strongest reason, best alternative, and the most important unresolved assumption.

5 Specify the next test

Suggested time: 6 minutes.

Test field	Your entry
Decision the test will change	
Population, recruitment route, exclusions, and relevant contexts	
Action and full normal-support service to test	
Comparator and assignment method, if estimating an effect	
Observation method, window, and repeat-opportunity rule	
Sample and precision rationale, including grouped/repeated records	
Completion, quality, cost, and capacity rules with reasons	
Missing-data rule and condition for an inconclusive result	
Date agreed; any later changes and their reasons	

Worked example. A handover service might require at least 70% completion because its assumed fallback capacity covers only the remaining 30%. That is an invented operating rationale, which must itself be checked. A small pilot above that threshold still needs adequate precision, normal support, and a quality check before it could justify expansion.

Choose a diagnostic observation when you need to locate a break. Choose an appropriate comparison when you need to estimate the effect of a service change. Neither a staged demonstration nor a few convenient volunteers establishes a general population rate.

Check: Would a different result change the decision? If every possible result leads to the same action, explain why this is the next useful test.

6 Define the measures

Suggested time: 5 minutes.

Measure	Numerator	Denominator and unit	Window	Data source; unknown/missing rule
Reach and applicable opportunity				
Attempt				
Completion and quality				
Repeat completion given another opportunity				
Useful outcome				
Staff time, total cost, and capacity				

Worked example. A saved handover form starts an attempt. A usable handover acknowledged by the next lead completes the action. Count team-handover opportunities, and identify repeat completion among first-completing teams that have another applicable handover. A missing acknowledgement record is unknown if the recording failed; a verified lack of acknowledgement by the deadline is a noncompletion.

Keep **yes**, **no**, **not applicable**, and **unknown** distinct. Report the unresolved count beside each rate. A zero denominator gives an undefined rate. A rate among attempts needs the broader opportunity rate beside it.

Check: Would excluding unreachable people or missing records make the result look better? Show what the exclusions remove and how plausible unresolved outcomes affect the decision.

7 Diagnose the result

Suggested time: 5 minutes.

For a case with no observed test results, write anticipated interpretations here. Label them as a proposed analysis. Do not invent a successful trial to finish the workbook.

Result or scenario	Plausible explanations	What this does not establish	Evidence that distinguishes the explanations

Worked example. Forms are saved but handovers are not acknowledged. Possible causes include shift overlap, unclear responsibility, a notification problem, or a recording failure. The result alone does not prove that written handovers are the wrong behavior. Compare record checks and observation of the handoff before choosing a repair or alternative.

Check: Separate a treatment that did not help from a behavior that cannot work, and a completed action from a useful outcome. Consider uncertainty, alternate explanations, and who is missing from the data.

8 Record the next decision

Suggested time: 5 minutes.

Choose one: **proceed narrowly, change support, reselect, stop, or inconclusive**. A proposed test is a complete next action when the evidence cannot yet support rollout.

Decision record	Your entry
Selected next decision and specific action	
Evidence and operating rule that justify it	
Population, context, support, and scale limits	
Remaining uncertainty and best rival explanation	
Owner, resource limit, and review point	
Finding that would reverse or reopen the decision	

Worked example. Change support: investigate acknowledgement timing and test a scheduled overlap before extending the written route. Preserve the discussion route as an alternative. This is a proposed response to an invented problem, not evidence that the repair will work.

Final check: Can a reader follow the evidence to your decision, identify what remains unknown, and carry out the next action without asking you to supply missing assumptions?

Compare and revise

Keep your original response, then open the selected case's worked analysis. Record one defensible difference and one revision. A good response need not reproduce the historical outcome. It must use the available evidence, expose assumptions, and make a practical next step clear.

Choose your worked analysis: [M-PESA](#) [6], [Instagram](#) [7], or [GOV.UK Verify](#) [8].

Use the [measurement lab](#) [9] to check your denominators and failure diagnosis. The [teaching notes](#) [10] explain source labels, adaptation, and review of learner responses.

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References and online companions

Numbered links identify sources or companion pages used in the text. External material retains its own rights. These links do not imply endorsement. The pack contains original teaching synthesis, not copies of third-party casebooks or proprietary exhibits.

1. M-PESA

<https://behavioralstrategy.com/education/mpesa-decision/>

2. Instagram

<https://behavioralstrategy.com/education/instagram-decision/>

3. GOV.UK Verify

<https://behavioralstrategy.com/education/verify-decision/>

4. printable workbook

<https://behavioralstrategy.com/downloads/teaching-pack/v1/decision-workbook.pdf>

5. editable Word workbook

<https://behavioralstrategy.com/downloads/teaching-pack/v1/decision-workbook.docx>

6. M-PESA

<https://behavioralstrategy.com/education/mpesa-worked-decision/>

7. Instagram

<https://behavioralstrategy.com/education/instagram-worked-decision/>

8. GOV.UK Verify

<https://behavioralstrategy.com/education/verify-worked-decision/>

9. measurement lab

<https://behavioralstrategy.com/education/measurement-lab/>

10. teaching notes

<https://behavioralstrategy.com/education/teaching-notes/>

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