

# Metrics Workshop Agenda

Goal: align on north stars, pick leading indicators, and define how we will measure a release.

Time	Min	Topic	Prompts	Content points	Outcome
09:00	10	Welcome & recap	What stood out during the online sessions?	<ul style="list-style-type: none"> <li>• Impact vs effort</li> <li>• Hypothesis-driven decisions</li> <li>• Break big/uncertain work into smaller bets</li> <li>• Avoid over-customizing ("we need XYZ")</li> <li>• Impact discussions without a clear definition of "impact"</li> <li>• No benchmark for feature success / prioritization</li> </ul>	
09:10	5	Set the goal + name north stars	Our goal: <b>"Help advisors help more people."</b> What are our north star metrics?	Solo: 3 minutes on sticky notes. Then compare with a neighbor.	
09:15	5	Define leading indicators	What leading indicators show progress toward the north star(s)?		
09:20	10	Breakout: converge on indicators	In groups, co-create leading indicators for the north-star metrics.	<ul style="list-style-type: none"> <li>• Expect: advisor productivity, compliance, sales needs</li> <li>• Measures: time saved, task completion, before/after</li> <li>• A/B tests and feature usage</li> <li>• Qual feedback (interviews, word of mouth)</li> </ul>	Top 5 indicators + how to measure them
09:30	15	Share-back (north stars + indicators)	Each group shares top 2 north stars and leading indicators.		
09:45	20	In practice: roll-out + measurement	Pick a concrete feature. Plan roll-out and success measurement. Assume instrumentation exists.	<ul style="list-style-type: none"> <li>• Trading &amp; rebalancing</li> <li>• Redesigned proposal journey</li> <li>• Investor experience</li> </ul>	Roll-out plan + success measurement plan
10:05	20	Share-back and compare approaches	Groups share their initiative and roll-out plan.	Discuss tradeoffs and what changes if instrumentation is missing.	
10:25	—	Close			

**Note:** This agenda is designed for ~85 minutes. If discussion runs long, cut the share-back time before you cut the breakout.