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SIGNAL INTELLIGENCE CAPABILITY DEFINITIONS AND MEASUREMENT

Signal Capability

Signal Awareness

Asking questions that are timely, relevant to the customer's context, and move the conversation forward.

Behavioral Measure: Question Quality

Definition:

Asking questions that are timely, relevant to the customer's context, and move the conversation forward.

Measured by:

1. Contextual Relevance
2. Forward Value

Scoring scale: 1–5

(3 = acceptable / effective, not average)

1. Contextual Relevance

Does the question reflect what is happening in the conversation right now?

Score	Anchor Description
1	Question is disconnected from the customer's prior statements or context.
2	Question loosely relates to the topic but does not clearly build on customer input.
3	Question reflects the customer's stated priorities or recent comments.
4	Question is well-timed and clearly responds to subtle cues or shifts in context.

Score	Anchor Description
5	Question precisely reflects what matters most in the moment and demonstrates strong situational awareness.

2. Forward Value

Does the question move the conversation somewhere useful?

Score	Anchor Description
1	Question does not advance the conversation or leads to a dead end.
2	Question adds limited value; response does not meaningfully progress discussion.
3	Question advances understanding or clarifies next steps.
4	Question opens productive dialogue and builds momentum.
5	Question significantly deepens the conversation and creates clear forward movement.

Roll-Up Guidance (If Needed)

- **Question Quality Score** = average of Contextual Relevance and Forward Value
 - Preserve visibility of both subscores for coaching
 - Do **not** weight unless supported by empirical data
-

Rater Calibration Rule (Critical)

Score what you can observe in the interaction — not the rep's intent or the customer's presumed attitude.

Coaching Use (Why This Works)

- Low **Contextual Relevance** → coach noticing and timing
 - Low **Forward Value** → coach purpose and question design
 - Both high → reinforce judgment, not technique
-

Canonical Lock-In Statement

Question Quality is high when questions fit the moment and move the conversation forward.

Signal Capability

Signal Interpretation

Behavioral Measurement: Listening & Responsiveness

Definition:

Accurately understanding customer input and responding in a way that clearly reflects that understanding

Minimum Number of Metrics (Clear Position)

Listening & Responsiveness should be measured with *two* metrics.

Two is the minimum that:

- Preserves construct validity
- Keeps behaviors observable
- Supports reliable scoring
- Enables precise coaching

Anything less collapses distinct behaviors.

Anything more adds redundancy and noise.

The Two Canonical Metrics (Recommended)

1. Accuracy of Interpretation

What it measures:

Whether the rep correctly understands and reflects what the customer has communicated.

Observable indicators:

- Rep paraphrases or summarizes customer input accurately
- Rep does not misinterpret intent, priority, or meaning
- Rep avoids responding to assumptions the customer did not express

Why this is essential:

You cannot respond well to a signal you have misunderstood.

2. Responsiveness of Action

What it measures:

Whether the rep's response meaningfully aligns with what the customer has said.

Observable indicators:

- Rep response directly addresses the customer's input
- Rep adjusts message, depth, or direction appropriately
- Rep avoids defaulting to pre-planned content

Why this is essential:

Accurate listening without aligned response still breaks momentum and trust.

What Is Intentionally Excluded

- ✗ “Active listening techniques” (too prescriptive)
- ✗ Sentiment inference
- ✗ Empathy scoring
- ✗ Customer satisfaction outcomes

These reduce reliability and blur constructs.

1–5 SCORING ANCHORS

Scoring scale: 1–5
(3 = effective / acceptable)

1. Accuracy of Interpretation

Did the rep correctly understand what the customer communicated?

Score	Anchor Description
1	Rep misinterprets or overlooks key customer input.
2	Rep captures some elements but misses or distorts important meaning.

Score	Anchor Description
3	Rep accurately understands and reflects the customer's stated input.
4	Rep accurately interprets both explicit input and implied context.
5	Rep demonstrates precise understanding, including subtle nuance or priority shifts.

2. Responsiveness of Action

Did the rep's response align with what the customer shared?

Score	Anchor Description
1	Rep response is unrelated or ignores customer input.
2	Rep response is partially aligned but relies on generic or pre-set content.
3	Rep responds appropriately and addresses the customer's input.
4	Rep adapts message or direction clearly based on customer input.
5	Rep responds fluidly and strategically, advancing the conversation based on customer input.

Roll-Up Guidance

- **Listening & Responsiveness Score** = average of the two metrics
- Keep subscores visible for coaching
- Do not weight unless empirically validated

Coaching Diagnostic Value

- Low **Accuracy of Interpretation** → coach listening precision and confirmation
- Low **Responsiveness of Action** → coach adaptability and response alignment
- Both high → reinforce judgment and situational fluency

Canonical Lock-In Statement

Listening & Responsiveness is strong when the rep understands the customer correctly and responds in a way that clearly reflects that understanding

Signal Capability

Value Connection

Behavioral Measurement: Value Framing (Making It Matter)

Definition:

Connecting information to customer-specific priorities and clearly explaining why it matters to them.

Minimum Number of Metrics (Clear Position)

Value Framing should be measured with *two* metrics.

Two is the minimum that:

- Preserves construct validity
- Separates *relevance* from *impact*
- Enables actionable coaching
- Avoids outcome contamination

One metric collapses meaning.

Three or more introduces redundancy.

The Two Canonical Metrics (Recommended)

1. Customer Relevance Alignment

What it measures:

Whether the value being communicated clearly connects to the customer's stated priorities, needs, or goals.

Observable indicators:

- Rep references customer-specific goals, challenges, or context
- Value statements align with what the customer has indicated matters

- Rep avoids generic or product-centered framing

Why this is essential:

Value that isn't relevant to the customer is not value — it's information.

2. Outcome Translation

What it measures:

Whether the rep translates information into meaningful customer outcomes.

Observable indicators:

- Rep connects features or data to implications for the customer
- Rep articulates “so what this means for you is...”
- Customer can clearly see why the information matters

Why this is essential:

Relevance alone is insufficient if impact is unclear.

What Is Intentionally Excluded

- ✗ Persuasiveness
- ✗ Enthusiasm or tone
- ✗ Agreement or buy-in
- ✗ Commercial outcomes

These either bias scores or measure results, not behavior.

1–5 SCORING ANCHORS

Scoring scale: 1–5
(3 = effective / acceptable)

1. Customer Relevance Alignment

Does the value connect to what the customer cares about?

Score	Anchor Description
1	Value presented is generic or unrelated to customer priorities.
2	Value loosely relates to customer context but remains mostly generic.
3	Value aligns with customer's stated priorities or needs.
4	Value clearly reflects customer-specific goals or challenges.
5	Value is precisely tailored to what matters most to the customer in that moment.

2. Outcome Translation

Does the rep clearly explain why the information matters?

Score	Anchor Description
1	Information is presented without explanation of impact.
2	Limited or vague explanation of why the information matters.
3	Clear explanation of how the information affects the customer.
4	Strong linkage between information and meaningful customer outcomes.
5	Compelling, situation-specific translation that makes impact immediately clear.

Roll-Up Guidance

- **Value Framing Score** = average of the two metrics
- Preserve metric-level visibility for coaching
- Do not weight unless empirically validated

Coaching Diagnostic Value

- Low **Customer Relevance Alignment** → coach discovery and context usage
- Low **Outcome Translation** → coach articulation of impact and “so what”
- Both high → reinforce strategic value framing

Optional Expansion (Use Sparingly)

If — and only if — you need additional diagnostic power, add **one** metric.

Optional Metric: Decision Orientation

What it measures:

Whether value framing helps the customer move toward a decision or next step.

Observable indicators:

- Value framing clarifies implications for action
- Customer responds with evaluative or decision-oriented questions
- Conversation progresses toward choice or prioritization

Why this earns its place:

- Still behavior-focused
- Avoids outcome bias
- Adds decision clarity without forcing persuasion

Why Other Candidates Were Excluded

Candidate	Why Excluded
Persuasiveness	Outcome-biased
Emotional appeal	Subjective, style-driven
Storytelling	Technique, not judgment
Customer agreement	Result, not behavior

Canonical Lock-In Statement

Value Framing is strong when relevance is clear and impact is unmistakable.

If you want next, I can:

- Normalize **Decision Orientation** to a 1–5 scale
- Apply this same rigor to the remaining Signal Intelligence capabilities
- Build a **cross-capability consistency check** so metrics feel coherent system-wide

Just tell me where to continue.

yes to 1-5

Below is the **normalized 1–5 scoring scale** for the **optional expansion metric** under **Value Connection**, written to match the rigor and style of the prior capabilities.

Signal Capability

Customer Engagement Monitoring

Measured by: Customer Engagement Cues

Definition:

Noticing changes in customer participation and conversational momentum and adjusting accordingly

Each metric is scored **1–5**, where **3 = acceptable / baseline**, not “average.”

1. Customer Verbal Participation Ratio

What is being scored:

The extent to which the customer is actively contributing vs passively responding.

Score	Behavioral Description
1	Customer responses are minimal (yes/no, short acknowledgments); rep dominates conversation.
2	Customer speaks occasionally but mostly reacts; limited elaboration or initiative.
3	Customer contributes regularly with complete responses; balanced participation overall.
4	Customer frequently elaborates, asks questions, or adds perspective; engagement is clearly active.
5	Customer consistently drives parts of the conversation; high energy, curiosity, and initiative throughout.

2. Responsiveness to Customer Cues

What is being scored:

Whether the rep notices and responds to shifts in engagement.

Score	Behavioral Description
1	Engagement cues are missed or ignored; rep continues unchanged despite clear signals.
2	Some cues noticed, but responses are delayed, generic, or misaligned.

Score	Behavioral Description
3	Rep acknowledges clear cues and adjusts appropriately when they are obvious.
4	Rep responds promptly to subtle cues and adjusts pacing, depth, or direction effectively.
5	Rep anticipates engagement shifts and adapts fluidly, often before disengagement occurs.

3. Momentum Continuity

What is being scored:

The ability to maintain conversational flow without stalls or forced transitions.

Score	Behavioral Description
1	Conversation frequently stalls; awkward pauses or abrupt topic shifts disrupt flow.
2	Momentum is inconsistent; several transitions feel forced or disjointed.
3	Conversation generally flows; occasional pauses but momentum is maintained overall.
4	Smooth progression between topics; momentum feels natural and sustained.
5	Conversation builds naturally with strong continuity; transitions deepen engagement rather than interrupt it.

4. Customer Signal Amplification

What is being scored:

Whether the rep strengthens engagement by building on customer input.

Score	Behavioral Description
1	Customer input is ignored or redirected without acknowledgment.
2	Rep acknowledges input but does not build on it meaningfully.
3	Rep follows up on customer input with relevant questions or reflections.
4	Rep consistently deepens engagement by expanding on customer signals.
5	Rep actively amplifies engagement, leading to richer dialogue and increased customer participation.

How Scores Should Be Interpreted (Important)

- **3 = Functional and acceptable**
- **4 = Strong, repeatable skill**
- **5 = Advanced, situational mastery**

Scores of **1–2** indicate:

- Missed signals
- Inconsistent awareness
- Coaching opportunity

Signal Capability

Objection Navigation

Behavioral Measurement: Objection Handling

Definition:

Responding to resistance with composure and engaging it in a way that sustains productive dialogue.

Construct Clarification (What We Are Actually Measuring)

Objection Navigation is **not** about:

- Overcoming objections
- Persuasion
- Winning arguments
- Securing agreement

It is about **maintaining productive dialogue in the presence of resistance**.

Instructionally and statistically, this capability breaks down into **three distinct failure modes**:

1. The rep becomes defensive
2. The rep stays calm but avoids the objection
3. The rep engages but leaves the objection unresolved or unclear

Your measurement system should detect **all three**.

Measurement Model (Integrity-First)

Core Metrics (Required)

These metrics together are **necessary and sufficient** to measure Objection Handling with integrity.

1. Non-Defensive Response

What it measures:

Whether the rep maintains composure, openness, and respect when resistance appears.

Observable indicators:

- No arguing, justifying, or dismissing
- Acknowledges the objection without minimizing it
- Tone remains calm and curious

Why this is essential:

Defensiveness immediately shuts down trust and learning.
Without this, navigation cannot occur.

2. Constructive Engagement

What it measures:

Whether the rep works with the objection rather than around it.

Observable indicators:

- Rep explores the objection to understand its basis
- Response is relevant to the specific concern raised
- Rep avoids deflection or premature redirection

Why this is essential:

Remaining calm without engagement is avoidance, not navigation.

Optional Expansion (Add Only When Needed)

Use this **only** when you need greater diagnostic resolution (e.g., coaching programs, manager enablement, analytics refinement).

3. Resolution Clarity (*Optional*)

What it measures:

Whether the objection is left clearer, contained, or positioned for next steps.

Observable indicators:

- Rep summarizes shared understanding
- Next steps or implications are clarified
- Objection feels acknowledged and bounded

Why this earns its place:

It captures a **distinct outcome of handling**, without requiring agreement or persuasion.

1–5 SCORING ANCHORS

Scoring scale: 1–5

(3 = effective / acceptable)

1. Non-Defensive Response

Does the rep remain open and composed when resistance appears?

Score	Anchor Description
1	Responds defensively, argues, or dismisses the objection.
2	Show mild defensiveness or discomfort; acknowledgment feels forced.
3	Remains calm and acknowledges the objection appropriately.
4	Responds with openness and curiosity, sustaining a constructive tone.
5	Creates psychological safety and openness around the objection.

2. Constructive Engagement

Does the rep engage the objection in a productive way?

Score	Anchor Description
1	Objection is ignored, deflected, or shut down.
2	Objection is acknowledged but not meaningfully explored.
3	Objection is addressed with relevant clarification or response.
4	Objection is explored and reframed to advance dialogue.
5	Objection is skillfully navigated, strengthening understanding and momentum.

3. Resolution Clarity (*Optional*)

Is the objection left in a clearer, more workable state?

Score	Anchor Description
1	Objection remains unresolved and conversation regresses.

Score	Anchor Description
2	Objection is acknowledged but left unclear or open-ended.
3	Objection is clarified or partially contained.
4	Objection is clearly reframed or positioned for next steps.
5	Objection is meaningfully resolved or cleanly staged for follow-up.

Roll-Up Guidance

- **Objection Handling Score** = average of core metrics
- Optional metric should **not** be required by default
- Preserve metric-level visibility for coaching
- Do not weight unless empirically validated

Coaching Diagnostics (Why This Design Works)

- Low **Non-Defensive Response** → coach emotional regulation and stance
- Low **Constructive Engagement** → coach exploration and relevance
- Low **Resolution Clarity** → coach summarization and containment

Each metric maps to a **different coaching intervention**.

Statistical Integrity Check

This design:

- Preserves construct validity
- Improves inter-rater reliability
- Avoids outcome contamination
- Separates style from behavior
- Scales across contexts

Nothing here is redundant.

Nothing here is artificial.

Canonical Lock-In Statement

Objection Navigation is strong when resistance is met with composure, engaged with curiosity, and left clearer than it began.

Signal Capability

Conversation Management

Behavioral Measurement: Conversation Control & Structure

Definition:

Providing clear direction and structure while guiding the conversation toward purposeful progress.

Construct Clarification (What We Are Measuring)

Conversation Management is **not** about:

- Dominating airtime
- Rigid agendas
- Script adherence
- Steering toward a predetermined outcome

It is about **helping the interaction progress coherently**, even as topics shift, time pressures emerge, or new information surfaces.

Across real interactions, this capability breaks down into **three distinct failure modes**:

1. The conversation lacks direction or coherence
2. The rep imposes structure without responsiveness
3. The rep adapts, but the conversation loses purpose or resolution

Your measurement model must detect **all three** without prescribing style.

Measurement Model (Integrity-First)

Core Metrics (Required)

These metrics together are **necessary and sufficient** to measure Conversation Control & Structure.

1. Directional Clarity

What it measures:

Whether the rep provides a clear sense of where the conversation is headed.

Observable indicators:

- Rep signals purpose, focus, or intent at key moments
- Transitions are framed rather than abrupt
- Customer understands the conversational direction

Why this is essential:

Without directional clarity, conversations drift — regardless of responsiveness.

2. Adaptive Steering

What it measures:

Whether the rep adjusts the conversation's direction appropriately as new input emerges.

Observable indicators:

- Rep integrates new topics without losing coherence
- Rep adjusts pacing, depth, or focus in response to customer input
- Structure flexes without collapsing

Why this is essential:

Control without adaptability feels rigid; adaptability without control feels chaotic.

Optional Expansion (Add Only When Needed)

Use this **only** when deeper diagnostic resolution or advanced coaching is required.

3. Purposeful Closure (*Optional*)

What it measures:

Whether the conversation is brought to a clear, intentional close.

Observable indicators:

- Rep summarizes key points or decisions
- Next steps or outcomes are made explicit
- Conversation ends with shared understanding

Why this earns its place:

It captures a **distinct endpoint behavior** that affects execution quality without forcing outcomes.

1–5 SCORING ANCHORS

Scoring scale: 1–5
(3 = effective / acceptable

1. Directional Clarity

Does the rep make the direction of the conversation clear?

Score	Anchor Description
1	Conversation lacks clear direction; topics feel disconnected.
2	Direction is implied but inconsistent or unclear.
3	Rep provides a generally clear sense of purpose and flow.
4	Rep clearly frames direction and transitions smoothly.
5	Rep consistently establishes and maintains clear conversational direction.

2. Adaptive Steering

Does the rep adjust structure appropriately as the conversation unfolds?

Score	Anchor Description
1	Rep ignores customer input and rigidly follows a set path.
2	Rep makes limited adjustments but structure often feels forced.
3	Rep adapts direction appropriately when new input arises.
4	Rep flexes structure fluidly while maintaining coherence.
5	Rep seamlessly balances structure and adaptability throughout the conversation.

3. Purposeful Closure (*Optional*)

Is the conversation brought to a clear and intentional close?

Score	Anchor Description
1	Conversation ends abruptly with no summary or next steps.
2	Closure is attempted but unclear or incomplete.
3	Rep summarizes or clarifies next steps adequately.
4	Rep clearly aligns on outcomes or next steps.
5	Rep brings the conversation to a confident, shared conclusion that supports forward action.

Roll-Up Guidance

- **Conversation Control & Structure Score** = average of core metrics
- Optional metric should be activated selectively
- Preserve metric-level visibility for coaching
- Do not weight metrics unless empirically validated

Coaching Diagnostics (Why This Works)

- Low **Directional Clarity** → coach framing and signaling intent
- Low **Adaptive Steering** → coach flexibility and integration of input
- Low **Purposeful Closure** → coach summarization and next-step clarity

Each metric points to a **different, actionable intervention**.

Statistical Integrity Check

This design:

- Preserves construct validity
- Maintains inter-rater reliability
- Avoids conflating control with dominance
- Separates structure from outcomes
- Scales across contexts and interaction types

Nothing here is redundant.

Nothing here is prescriptive.

Canonical Lock-In Statement

Conversation Management is strong when direction is clear, structure is adaptive, and purpose is maintained throughout the interaction.

Signal Capability

Adaptive Response

Behavioral Measurement: Adaptability

Definition:

Making timely, appropriate adjustments to approach based on what is happening in the interaction

Construct Clarification (What We Are Measuring)

Adaptive Response is **not** about:

- Constant improvisation
- Abandoning structure
- Changing direction unnecessarily
- Reacting emotionally

It is about **making intentional, situational adjustments** when new information, signals, or constraints emerge.

In real interactions, this capability fails in **three distinct ways**:

1. The rep does not notice the need to adapt
2. The rep notices but adjusts ineffectively
3. The rep adapts, but in a way that disrupts coherence or purpose

Your measurement system should detect **all three** without rewarding randomness.

Measurement Model (Integrity-First)

Core Metrics (Required)

These metrics together are **necessary and sufficient** to measure Adaptability with integrity.

1. Situational Responsiveness

What it measures:

Whether the rep recognizes and responds to changes in the interaction as they occur.

Observable indicators:

- Rep adjusts pacing, depth, or focus in response to new input
- Rep acknowledges shifts in context, constraints, or priorities
- Rep avoids continuing on autopilot when conditions change

Why this is essential:

Adaptation cannot occur without recognition of change.

2. Approach Adjustment Quality

What it measures:

Whether the adjustment made is appropriate and helpful given the situation.

Observable indicators:

- Adjustment aligns with the customer's needs or direction
- Rep avoids overcorrecting or undercorrecting
- The new approach improves clarity or momentum

Why this is essential:

Not all adaptation is good adaptation — quality matters.

Optional Expansion (Add Only When Needed)

Use this **only** when deeper diagnostic resolution or advanced coaching is required.

3. Continuity Preservation (*Optional*)

What it measures:

Whether adaptation maintains coherence and purpose across the conversation.

Observable indicators:

- Rep connects the adjustment to prior discussion
- Conversation remains understandable and purposeful

- Adaptation feels intentional, not abrupt

Why this earns its place:

It captures a **distinct failure mode**: adapting in a way that fragments the interaction.

1–5 SCORING ANCHORS

Scoring scale: 1–5
(3 = effective / acceptable)

1. Situational Responsiveness

Does the rep recognize and respond to changes in the moment?

Score	Anchor Description
1	Rep does not adjust despite clear changes in the interaction.
2	Rep notices change but responds slowly or inconsistently.
3	Rep adjusts appropriately to clear changes in the situation.
4	Rep responds promptly to subtle shifts in context or cues.
5	Rep anticipates changes and adapts fluidly as the interaction unfolds.

2. Approach Adjustment Quality

Is the adjustment appropriate and effective?

Score	Anchor Description
1	Adjustment is inappropriate or disruptive.
2	Adjustment partially fits but creates confusion or inefficiency.
3	Adjustment fits the situation and supports the conversation.
4	Adjustment clearly improves relevance or momentum.
5	Adjustment is highly effective and strengthens overall interaction quality.

3. Continuity Preservation (*Optional*)

Does the adaptation maintain coherence and purpose?

Score	Anchor Description
1	Adaptation fragments the conversation or causes loss of focus.
2	Adaptation disrupts flow or purpose.
3	Adaptation maintains basic continuity.
4	Adaptation preserves clarity and conversational coherence.
5	Adaptation feels seamless and reinforces overall direction and purpose.

Roll-Up Guidance

- **Adaptability Score** = average of core metrics
 - Optional metric should be activated selectively
 - Preserve metric-level visibility for coaching
 - Do not weight metrics unless empirically validated
-

Coaching Diagnostics (Why This Works)

- Low **Situational Responsiveness** → coach noticing and awareness
- Low **Approach Adjustment Quality** → coach judgment and choice of response
- Low **Continuity Preservation** → coach integration and intentional transitions

Each metric maps to a **distinct coaching intervention**.

Statistical Integrity Check

This design:

- Preserves construct validity
- Improves inter-rater reliability
- Separates responsiveness from effectiveness
- Avoids rewarding randomness or improvisation
- Scales across interaction types

Nothing here is redundant.

Nothing here compromises integrity

Canonical Lock-In Statement

Adaptive Response is strong when adjustments are timely, appropriate, and maintain coherence in the interaction.

Signal Capability

Commitment Generation

Behavioral Measurement: Commitment Gaining

Definition:

Establishing clear next actions that are voluntarily owned by the customer.

Construct Clarification (What We Are Measuring)

Commitment Generation is **not** about:

- Closing techniques
- Pressure or persuasion
- Agreement at all costs
- Verbal enthusiasm

It is about **helping the customer make a clear, self-directed decision about what happens next.**

In real interactions, this capability fails in **three distinct ways**:

1. No clear next action is established
2. A next action is suggested but not owned by the customer
3. A next action is stated but lacks clarity or commitment strength

Your measurement system must distinguish **all three**.

Measurement Model (Integrity-First)

Core Metrics (Required)

These metrics together are **necessary and sufficient** to measure Commitment Gaining with integrity.

1. Next-Step Clarity

What it measures:

Whether a specific, concrete next action is clearly articulated.

Observable indicators:

- Next step is explicitly stated (who, what, when)
- Avoids vague endings (“we’ll follow up”)
- Both parties appear aligned on what comes next

Why this is essential:

Without clarity, there is no real commitment — only intention.

2. Customer Ownership

What it measures:

Whether the next action is voluntarily accepted or initiated by the customer.

Observable indicators:

- Customer verbally agrees to or proposes the next step
- Language reflects ownership (“I will...”, “We’ll...”)
- Rep avoids imposing or forcing the action

Why this is essential:

Commitment without ownership is compliance, not engagement.

Optional Expansion (Add Only When Needed)

Use this **only** when deeper diagnostic resolution or advanced coaching is required.

3. Commitment Strength (*Optional*)

What it measures:

How firm and actionable the commitment appears.

Observable indicators:

- Timing and scope are realistic and specific
- Commitment feels credible given the conversation
- No hedging or ambiguity in language

Why this earns its place:

It captures a **distinct quality dimension** without requiring outcome success.

1–5 SCORING ANCHORS

Scoring scale: 1–5
(3 = effective / acceptable)

1. Next-Step Clarity

Is there a clear, specific next action?

Score	Anchor Description
--------------	---------------------------

- | | |
|----------|--|
| 1 | No next step is identified. |
| 2 | Next step is vague or implied but not clearly defined. |
| 3 | Next step is clearly stated. |
| 4 | Next step is specific and well-articulated. |
| 5 | Next step is explicit, concrete, and unambiguous. |
-

2. Customer Ownership

Does the customer voluntarily own the next action?

Score	Anchor Description
--------------	---------------------------

- | | |
|----------|--|
| 1 | No customer commitment is expressed. |
| 2 | Customer passively agrees without clear ownership. |
| 3 | Customer verbally agrees to the next step. |
| 4 | Customer clearly accepts and affirms ownership of the next step. |
| 5 | Customer proactively articulates or reinforces ownership of the next action. |
-

3. Commitment Strength (*Optional*)

How firm and actionable is the commitment?

Score	Anchor Description
--------------	---------------------------

- | | |
|----------|------------------------------------|
| 1 | Commitment is weak or unrealistic. |
|----------|------------------------------------|

Score	Anchor Description
2	Commitment is tentative or heavily qualified.
3	Commitment is reasonable and credible.
4	Commitment is firm and actionable.
5	Commitment is strong, specific, and highly credible.

Roll-Up Guidance

- **Commitment Gaining Score** = average of core metrics
 - Optional metric should be activated selectively
 - Preserve metric-level visibility for coaching
 - Do not weight metrics unless empirically validated
-

Coaching Diagnostics (Why This Works)

- Low **Next-Step Clarity** → coach articulation of next actions
- Low **Customer Ownership** → coach invitation vs imposition
- Low **Commitment Strength** → coach realism and specificity

Each metric maps to a **distinct coaching lever**.

Statistical Integrity Check

This design:

- Preserves construct validity
- Avoids outcome bias (no requirement that the action actually happens)
- Maintains inter-rater reliability
- Separates commitment from persuasion
- Scales across interaction types

Nothing here is redundant.

Nothing here compromises integrity

Canonical Lock-In Statement

Commitment Generation is strong when next actions are clear, voluntary, and owned by the customer.

Below is a **one-page governance artifact** you can use internally across **product, enablement, analytics, and coaching**.

It is written to be **authoritative, simple, and enforceable** — not explanatory.

You can treat this as a **source-of-truth reference**.

Signal Intelligence™

Capability & Measurement Governance (One-Page)

Purpose

To ensure Signal Intelligence capabilities are **distinct, measurable, coachable, and analytically sound**, without redundancy or artificial complexity.

Core Design Principles (Non-Negotiable)

1. Capabilities describe judgment
 2. Measurements capture observable behavior
 3. No metric infers intent, emotion, or outcome
 4. Each metric earns its place by explaining a distinct failure mode
 5. Optional metrics explain variance — they do not define the construct
-

Capability Boundary Rules

Each capability must answer a **different diagnostic question**.

If two capabilities can be coached the same way, they are overlapping and must be revised.

Canonical Capabilities & Measurements

1. Signal Awareness

Did the rep notice what mattered?

- Contextual Relevance
 - Forward Value
-

2. Signal Interpretation

Did the rep understand and respond correctly?

- Accuracy of Interpretation
 - Responsiveness of Action
 - *(Optional)* Confirmation of Understanding
-

3. Value Connection

Did the rep make it meaningful to the customer?

- Customer Relevance Alignment
 - Outcome Translation
 - *(Optional)* Decision Orientation
-

4. Customer Engagement Monitoring

Did the rep notice changes in momentum and participation?

- Customer Verbal Participation
 - Responsiveness to Engagement Cues
 - Momentum Continuity
 - Signal Amplification
-

5. Objection Navigation

Did the rep respond constructively to resistance?

- Non-Defensive Response
 - Constructive Engagement
 - *(Optional)* Resolution Clarity
-

6. Conversation Management

Did the rep guide the conversation with clarity and purpose?

- Directional Clarity
 - Adaptive Steering
 - (*Optional*) Purposeful Closure
-

7. Adaptive Response

Did the rep adjust appropriately in real time?

- Situational Responsiveness
 - Approach Adjustment Quality
 - (*Optional*) Continuity Preservation
-

8. Commitment Generation

Did the customer voluntarily commit to next actions?

- Next-Step Clarity
 - Customer Ownership
 - (*Optional*) Commitment Strength
-

Overlap Prevention Rules

- **Signal Awareness ≠ Signal Interpretation**
Awareness = noticing
Interpretation = meaning + response
- **Engagement Monitoring ≠ Conversation Management**
Engagement = customer behavior
Management = rep structure
- **Adaptive Response ≠ Objection Navigation**
Adaptation = any situational shift
Objections = resistance only
- **Conversation Management ≠ Commitment Generation**
Management = process
Commitment = customer decision

Measurement Activation Rules

- Core metrics are **always active**
 - Optional metrics are activated **only when deeper diagnosis is required**
 - Optional metrics are **never required for scoring**
 - Metrics are **never weighted without empirical validation**
-

Coaching Integrity Rule

Each metric must map to a **different coaching action**.

If a coach cannot give different guidance based on two metrics, one must be removed.

Scoring Integrity Rule

- **3 = effective / acceptable**
 - Scores reflect **what happened**, not what was intended
 - Customer outcomes do **not** determine scores
 - Style preferences must not influence scoring
-

Canonical System Statement

Signal Intelligence is a judgment system.

Capabilities define where judgment is applied.

Measurements reveal how judgment shows up in behavior.

If you want, I can next:

- Convert this into a **PDF / slide version**
- Create a **rater decision tree**
- Map each capability to **UI patterns**
- Audit existing scoring for violations

Just tell me.

Signal Intelligence™ Scoring Validation Audit

Below is a **validation audit** of the existing scoring system, based strictly on the body of work we've developed.

This is not a redesign — it is a **check for validity, reliability, and defensibility**.

Scope

Audit of current scoring approach across all 8 Signal Intelligence capabilities to assess:

- Construct validity
 - Inter-rater reliability risk
 - Redundancy / overlap
 - Instructional and coaching integrity
-

1. Construct Validity Audit

Are we scoring what we say we are scoring?

Strengths

- Capabilities and behavioral measurements are clearly separated
- Definitions focus on **observable behavior**, not inferred traits
- No scores require:
 - Intent inference
 - Emotional attribution
 - Outcome success

Watchouts

- Any scoring language that:
 - Uses “ability,” “skill,” or “competence” in the rubric
 - References internal states (“understands,” “feels,” “cares”) without behavioral evidence

Validation Rule:

If a rater must *assume* something internal, the score is invalid.

2. Inter-Rater Reliability Audit

Would two trained raters score the same interaction similarly?

Strengths

- 1–5 anchors are behaviorally described
- “3 = effective / acceptable” is consistently defined
- Metrics are orthogonal (non-overlapping)

Watchouts

- Optional metrics being used inconsistently
- Raters blending:
 - Engagement into Interpretation
 - Adaptability into Objection Navigation
- Overweighting tone or personality style

Validation Rule:

If two raters can justify different scores using different criteria, calibration is required.

3. Redundancy & Double-Counting Audit

Are we scoring the same behavior twice?

Strengths

- Clear boundary rules between capabilities
- Optional metrics clearly labeled and non-required
- Engagement metrics focus on **customer behavior**, not rep intent

Watchouts

- Penalizing reps twice for:
 - Missed engagement cues (Engagement Monitoring + Adaptive Response)
 - Poor closure (Conversation Management + Commitment Generation)

Validation Rule:

A single observed behavior should map to **one primary capability**.

4. Optional Metric Activation Audit

Are optional metrics being used correctly?

Intended Use

- Activated selectively for:
 - Coaching
 - Advanced diagnostics
 - Deeper analysis

Common Misuse Patterns

- Optional metrics treated as required
- Optional metrics averaged into core scores
- Optional metrics used without rater training

Validation Rule:

Optional metrics may explain variance — they must never define performance.

5. Scoring Scale Integrity Audit

Is the 1–5 scale functioning as intended?

Strengths

- Anchors are behavior-based, not comparative
- Midpoint (3) is clearly defined
- High scores require *distinct* mastery behaviors

Watchouts

- Score compression (everyone scoring 3–4)
- Avoidance of 1–2 scores due to discomfort
- Treating 5 as “rare perfection” instead of “clear mastery”

Validation Rule:

If the full scale is not used over time, calibration is required.

6. Coaching Alignment Audit

Do scores lead to different coaching actions?

 **Strengths**

- Each metric maps to a distinct coaching lever
- Low scores indicate *what to coach*, not just *that coaching is needed*

 **Watchouts**

- Generic feedback (“listen more,” “be more engaging”)
- Coaching based on overall scores rather than metric patterns

Validation Rule:

If two different low scores lead to the same coaching advice, one metric is unnecessary.

7. Psychological Safety & Adoption Audit

Does scoring feel developmental rather than judgmental?

 **Strengths**

- Behavior-first language
- No trait or personality labeling
- “What happened” framing vs “who you are”

 **Watchouts**

- Using scores as labels (“low adaptability rep”)
- Comparing reps against each other instead of against criteria

Validation Rule:

Scores describe interactions, not individuals.

8. System-Level Validation Conclusion

Current State

- **Measurement integrity is high**
- **Definitions are defensible**
- **Scoring model is structurally sound**

Primary Validation Risks (If Any)

1. Rater drift without calibration
2. Optional metrics becoming mandatory by habit
3. Over-interpretation of scores without behavioral evidence

None of these require redesign — only **governance and calibration**.

Canonical Validation Statement

If scoring stays behavior-anchored, capability-distinct, and coaching-linked, the Signal Intelligence system remains valid, reliable, and scalable.

