

# Blueprint AI Sentiment Training Pack

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Balanced training dataset for business journal sentiment & category classification, with labeling guidelines, negation handling, and evaluation checklist.

## 1. Labeling Rubric & Definitions

Category	Definition	Keywords / Cues	Common Confusion
Growth	Forward momentum in demand, revenue, sales, expansion, new markets, channel, pipeline	growing, expanding, up, increase, momentum	Achievement
Challenge	Problems, risks, blockers, negative outcomes, delays, cash flow, churn, learning, complaint	struggle, delay, cash flow, challenge, problem, risk, blocker	Learning
Achievement	Milestones reached, launches, awards, success, shipped, go-to-market, passed audit	launched, shipped, award, success, milestone	Research
Planning	Future-oriented scoping, roadmaps, budgets, roadmaps, OKRs, research, roadmap	plans, roadmap, scope, OKRs, research	Challenge
Learning	Reflections, post mortems, discovered insights, realised, discovered, challenge, post-mortem	insights, realised, discovered, challenge, post-mortem	Research
Research	Fact-finding, interviews, competitive/market research, analysis, evaluate, planning	market research, analyse, evaluate, planning	Challenge

Tie break rules

- If an entry contains a problem and a fix/win in the same breath, label as Challenge (primary).
- If planning relies on new facts gathered, label as Research if the emphasis is gathering insights; otherwise Planning.
- Post mortems and lessons after a failure are Learning, not Challenge.
- Launches/releases with clear success metrics are Achievement.
- Pure sales/expansion momentum without a specific milestone is Growth.

## 2. Mood & Energy Normalisation

Normalize free text moods to a small polarity set internally (Positive/Negative/Neutral) but retain the original label for UX. Infer energy from intensifiers (exclamation, 'very/incredibly') and dampeners ('slightly/quietly').

## 3. Negation & Contrast Handling

- Negators: not / no / never — invert local sentiment (e.g., “ not happy ”).
- Contrast markers: but / however / although — lower confidence; favour primary clause (often a Challenge).

## 4. Annotation Workflow

- Two annotators minimum; 10 – 15% overlap for agreement; adjudicate disagreements.
- Stratified train/validation/test split by time and user to avoid leakage.
- Track slice metrics: short entries (<40 chars), negation, contrast, finance, launches.

## 5. Balanced Dataset (72 entries)

Each entry includes text, expected\_category, expected\_mood, expected\_energy, confidence\_range, and business\_context.

#1

**Text:** We onboarded three enterprise clients this week; MRR crossed R300k and momentum feels real.

**Expected Category:** Growth **Mood:** Excited **Energy:** high

**Confidence Range:** 90–95%

**Business Context:** Enterprise sales traction increasing recurring revenue

**#2**

**Text:** Foot traffic at the pop-up in Cape Town CBD doubled after the influencer collab.

**Expected Category:** Growth **Mood:** Optimistic **Energy:** high

**Confidence Range:** 85–95%

**Business Context:** Retail activation success driving demand

**#3**

**Text:** First international shipment to Namibia arrived without issues; exploring SADC expansion.

**Expected Category:** Growth **Mood:** Confident **Energy:** high

**Confidence Range:** 85–90%

**Business Context:** Regional market entry via cross-border logistics

**#4**

**Text:** Upsell campaign lifted ARPU by 14% — strong response from legacy customers.

**Expected Category:** Growth **Mood:** Pleased **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Monetisation uplift via targeted upsells

**#5**

**Text:** Our API partnership with a fintech aggregator opened a new channel for leads.

**Expected Category:** Growth **Mood:** Energised **Energy:** high

**Confidence Range:** 85–90%

**Business Context:** Channel partnership expanding top of funnel

**#6**

**Text:** Organic search impressions are up 60% after the new content cluster on DocSafe.

**Expected Category:** Growth **Mood:** Encouraged **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** SEO content strategy compounding traffic

**#7**

**Text:** We piloted a reseller programme with two accounting firms; early signs are promising.

**Expected Category:** Growth **Mood:** Hopeful **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** B2B reseller motion to scale distribution

**#8**

**Text:** Paid social finally hit a sustainable CAC:LTV ratio after creative refresh.

**Expected Category:** Growth **Mood:** Relieved **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Performance marketing efficiency restored

**#9**

**Text:** Webinar registrations exceeded 500; strong interest from SMEs in KZN and Gauteng.

**Expected Category:** Growth **Mood:** Excited **Energy:** high

**Confidence Range:** 85–95%

**Business Context:** Demand generation via educational webinars

**#10**

**Text:** Churn fell from 5.1% to 3.4% after onboarding tweaks.

**Expected Category:** Growth **Mood:** Optimistic **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Retention improvement via onboarding changes

**#11**

**Text:** Launched a student pricing tier; signups picked up on Friday paydays.

**Expected Category:** Growth **Mood:** Curious **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Pricing experimentation opening new segment

**#12**

**Text:** Marketplace listing drove steady weekly trials; conversion holding at 19%.

**Expected Category:** Growth **Mood:** Positive **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Third-party marketplace distribution working

**#13**

**Text:** Load shedding during peak hours hurt our live training session; several attendees dropped.

**Expected Category:** Challenge **Mood:** Frustrated **Energy:** medium

**Confidence Range:** 85–95%

**Business Context:** Operational disruption due to power outages

**#14**

**Text:** Cash flow is tight; delaying my own draw to make payroll this month.

**Expected Category:** Challenge **Mood:** Stressed **Energy:** low

**Confidence Range:** 90–95%

**Business Context:** Liquidity crunch affecting founder remuneration

**#15**

**Text:** Key engineer resigned unexpectedly; recruiting replacement is urgent.

**Expected Category:** Challenge **Mood:** Overwhelmed **Energy:** low

**Confidence Range:** 85–95%

**Business Context:** Staffing gap creating delivery risk

**#16**

**Text:** A client raised a POPIA concern about DocSafe sharing links — need to update our policy copy.

**Expected Category:** Challenge **Mood:** Concerned **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Regulatory/compliance question from customer

**#17**

**Text:** Supplier pushed our hardware delivery out by two weeks; risk to KZN rollout.

**Expected Category:** Challenge **Mood:** Anxious **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Supply chain delay impacts deployment

**#18**

**Text:** Incident: API outage for 47 minutes — root cause traced to misconfigured cache invalidation.

**Expected Category:** Challenge **Mood:** Determined **Energy:** medium

**Confidence Range:** 85–95%

**Business Context:** Production reliability issue under investigation

**#19**

**Text:** Two chargebacks came through; unclear if fraud or misunderstanding.

**Expected Category:** Challenge **Mood:** Worried **Energy:** low

**Confidence Range:** 80–90%

**Business Context:** Payments risk and reconciliation burden

**#20**

**Text:** Competitor undercut our pricing with a limited-time offer; sales pipeline hesitating.

**Expected Category:** Challenge **Mood:** Uneasy **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Competitive pressure affecting conversions

**#21**

**Text:** Not happy with our NPS trend — responses dipped after we changed support hours.

**Expected Category:** Challenge **Mood:** Disappointed **Energy:** low

**Confidence Range:** 80–90%

**Business Context:** Customer satisfaction drop linked to service change

**#22**

**Text:** Board meeting was tense; targets missed in Q2 and questions were pointed.

**Expected Category:** Challenge **Mood:** Pressured **Energy:** low

**Confidence Range:** 80–90%

**Business Context:** Governance pressure after underperformance

**#23**

**Text:** We discovered duplicate records in the CRM; reporting is unreliable until fixed.

**Expected Category:** Challenge **Mood:** Irritated **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Data quality issue compromising analytics

#24

**Text:** Customs held our demo units at OR Tambo; training schedule at risk.  
**Expected Category:** Challenge **Mood:** Frustrated **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Logistics/cross-border clearance delays

#25

**Text:** Hit break-even this month — quietly proud of the team for pushing through.  
**Expected Category:** Achievement **Mood:** Proud **Energy:** medium  
**Confidence Range:** 90–95%  
**Business Context:** Financial milestone achieving sustainability

#26

**Text:** Launched the new onboarding flow; activation rate jumped 18% in week one.  
**Expected Category:** Achievement **Mood:** Accomplished **Energy:** high  
**Confidence Range:** 85–95%  
**Business Context:** Product milestone with measurable impact

#27

**Text:** Secured our first university client after a thorough security review.  
**Expected Category:** Achievement **Mood:** Validated **Energy:** high  
**Confidence Range:** 85–95%  
**Business Context:** Enterprise trust milestone following infosec checks

#28

**Text:** Our Women's Day campaign exceeded engagement targets by 2x.  
**Expected Category:** Achievement **Mood:** Delighted **Energy:** high  
**Confidence Range:** 85–90%  
**Business Context:** Marketing campaign outperformed expectations

#29

**Text:** Closed a multi-year agreement with a national distributor.  
**Expected Category:** Achievement **Mood:** Triumphant **Energy:** high  
**Confidence Range:** 90–95%  
**Business Context:** Strategic partnership securing long-term revenue

#30

**Text:** Recognised as a top startup in the Western Cape tech awards.  
**Expected Category:** Achievement **Mood:** Grateful **Energy:** high  
**Confidence Range:** 85–90%  
**Business Context:** External recognition boosting credibility

#31

**Text:** Shipped accessibility improvements and received heartfelt user feedback.  
**Expected Category:** Achievement **Mood:** Moved **Energy:** medium  
**Confidence Range:** 85–90%  
**Business Context:** Inclusive design win increasing usability

#32

**Text:** Customer success playbook reduced escalations by 40%.  
**Expected Category:** Achievement **Mood:** Satisfied **Energy:** medium  
**Confidence Range:** 85–90%  
**Business Context:** Operational excellence through process

#33

**Text:** Our first Cape Town office day with the whole team — morale is high.  
**Expected Category:** Achievement **Mood:** Happy **Energy:** high  
**Confidence Range:** 80–90%  
**Business Context:** Culture milestone strengthening cohesion

**#34**

**Text:** Completed our first successful security audit with zero critical findings.

**Expected Category:** Achievement **Mood:** Relieved **Energy:** high

**Confidence Range:** 85–95%

**Business Context:** Compliance milestone demonstrating maturity

**#35**

**Text:** The budget calculator passed QA and is live in BizBuilder Tools.

**Expected Category:** Achievement **Mood:** Pleased **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Feature delivery expanding product value

**#36**

**Text:** Support response time now under 2 minutes on average.

**Expected Category:** Achievement **Mood:** Proud **Energy:** high

**Confidence Range:** 85–90%

**Business Context:** Service excellence improving user experience

**#37**

**Text:** Drafting Q4 marketing plan focusing on webinars, SEO clusters, and partner co-marketing.

**Expected Category:** Planning **Mood:** Organised **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Campaign planning for next quarter

**#38**

**Text:** Mapping a hiring plan: one full-stack dev, one data analyst, and a CS manager.

**Expected Category:** Planning **Mood:** Focused **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Workforce planning aligned to growth

**#39**

**Text:** Creating a POPIA compliance roadmap with policy updates and staff training.

**Expected Category:** Planning **Mood:** Methodical **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Regulatory alignment and internal governance

**#40**

**Text:** Scheduling a phased DocSafe migration to S3-compatible storage on R2.

**Expected Category:** Planning **Mood:** Analytical **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Infrastructure planning to reduce costs

**#41**

**Text:** Preparing investor update materials with revised KPIs and runway outlook.

**Expected Category:** Planning **Mood:** Measured **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Stakeholder communications and fundraising hygiene

**#42**

**Text:** Setting quarterly OKRs to improve activation and reduce churn by 1.5pp.

**Expected Category:** Planning **Mood:** Determined **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Outcome-driven planning with targets

**#43**

**Text:** Designing a coaching programme for SMEs using our Training library.

**Expected Category:** Planning **Mood:** Constructive **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Programme design for customer enablement

**#44**

**Text:** Scoping a pilot for Afrikaans UI localisation across key views.

**Expected Category:** Planning **Mood:** Optimistic **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Internationalisation planning for local market fit

**#45**

**Text:** Building a price test matrix for tiered plans including an annual discount.

**Expected Category:** Planning **Mood:** Analytical **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Pricing experiments for monetisation

**#46**

**Text:** Outlining a crisis comms plan for outages and security incidents.

**Expected Category:** Planning **Mood:** Prepared **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Risk management and communication strategy

**#47**

**Text:** Creating a content calendar for LinkedIn thought leadership posts.

**Expected Category:** Planning **Mood:** Organised **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Editorial planning to drive awareness

**#48**

**Text:** Drafting requirements for an in-app referral programme with rewards.

**Expected Category:** Planning **Mood:** Practical **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Growth loop planning to encourage virality

**#49**

**Text:** Customer interviews revealed our trial is too short for SMEs to see value.

**Expected Category:** Learning **Mood:** Reflective **Energy:** medium

**Confidence Range:** 85–90%

**Business Context:** Voice of customer insights driving change

**#50**

**Text:** We learned that WhatsApp support is preferred over email for urgent issues.

**Expected Category:** Learning **Mood:** Insightful **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Support channel preference discovery

**#51**

**Text:** Post-mortem: incident alerts were noisy; we need better thresholds and runbooks.

**Expected Category:** Learning **Mood:** Analytical **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Operational learning from outage

**#52**

**Text:** Realised our Afrikaans translations need a professional review to avoid ambiguity.

**Expected Category:** Learning **Mood:** Thoughtful **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Localization quality improvements

**#53**

**Text:** Beta users struggled with DocSafe permissions — the UI labels are not clear.

**Expected Category:** Learning **Mood:** Concerned **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Usability feedback informing redesign

**#54**

**Text:** A/B test showed shorter headlines lift CTR; long copy hurt conversions.

**Expected Category:** Learning **Mood:** Curious **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Experimentation insights for marketing

**#55**

**Text:** We underestimated the accounting export need — bookkeepers need CSV + Xero.

**Expected Category:** Learning **Mood:** Humbled **Energy:** low  
**Confidence Range:** 80–90%  
**Business Context:** Feature gap identified via user roles

#56

**Text:** Churn analysis suggests onboarding emails arrive too late on Fridays.  
**Expected Category:** Learning **Mood:** Analytical **Energy:** medium  
**Confidence Range:** 80–88%  
**Business Context:** Lifecycle timing insight from cohort data

#57

**Text:** Found that SMEs prefer rands in pricing examples — dollars feel foreign.  
**Expected Category:** Learning **Mood:** Practical **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Localisation learning for SA audience

#58

**Text:** Our training videos load slowly on mobile data — compress and add captions.  
**Expected Category:** Learning **Mood:** Resolved **Energy:** medium  
**Confidence Range:** 80–88%  
**Business Context:** Media optimisation learning

#59

**Text:** We tried removing the free tier; trial-to-paid rose but signups dipped — trade-off to weigh.  
**Expected Category:** Learning **Mood:** Balanced **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Pricing and funnel dynamics insight

#60

**Text:** Sales calls taught us to avoid jargon; plain language boosts trust.  
**Expected Category:** Learning **Mood:** Encouraged **Energy:** medium  
**Confidence Range:** 80–88%  
**Business Context:** Messaging clarity lesson

#61

**Text:** Comparing cloud storage costs between R2 and S3 regions for POPIA-friendly setup.  
**Expected Category:** Research **Mood:** Analytical **Energy:** medium  
**Confidence Range:** 85–90%  
**Business Context:** Infrastructure cost and compliance study

#62

**Text:** Surveying SMEs about preferred invoicing tools to scope integrations.  
**Expected Category:** Research **Mood:** Curious **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Ecosystem mapping for product roadmap

#63

**Text:** Desk research on SARS tax bracket changes to update the estimator.  
**Expected Category:** Research **Mood:** Methodical **Energy:** medium  
**Confidence Range:** 85–90%  
**Business Context:** Regulatory data gathering for calculator

#64

**Text:** Studying competitor onboarding to benchmark time-to-value flows.  
**Expected Category:** Research **Mood:** Focused **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Competitive analysis of activation patterns

#65

**Text:** Analysing payment provider reliability and dispute rates for SA merchants.  
**Expected Category:** Research **Mood:** Investigative **Energy:** medium  
**Confidence Range:** 80–90%  
**Business Context:** Vendor selection research

#66

**Text:** Running a pricing conjoint survey for tier packaging and features.

**Expected Category:** Research **Mood:** Analytical **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Quantitative research to inform pricing

#67

**Text:** Exploring voice-to-text APIs for journaling with mood detection.

**Expected Category:** Research **Mood:** Exploratory **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Feasibility study for new capability

#68

**Text:** Collecting qualitative feedback on the Goals page from 15 users.

**Expected Category:** Research **Mood:** Inquisitive **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Usability research via interviews

#69

**Text:** Heatmap analysis shows low interaction with the DocSafe sidebar icons.

**Expected Category:** Research **Mood:** Curious **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Behavioural analytics diagnosing UX issues

#70

**Text:** Evaluating BI connectors to export metrics into Google Looker Studio.

**Expected Category:** Research **Mood:** Analytical **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Reporting/BI integration research

#71

**Text:** Assessing market demand for coach/mentor workspaces in SA.

**Expected Category:** Research **Mood:** Open-minded **Energy:** medium

**Confidence Range:** 80–88%

**Business Context:** Opportunity sizing for collaboration features

#72

**Text:** Investigating offline-first options for low-bandwidth regions.

**Expected Category:** Research **Mood:** Pragmatic **Energy:** medium

**Confidence Range:** 80–90%

**Business Context:** Technical research for accessibility and reach



## 6. Evaluation Checklist

- Report accuracy, macro F1, per class F1, and confusion matrix.
- Target macro F1 0.85 and 0.80 for each slice (negation, short, mixed).
- Calibrate classifier probabilities (e.g., Platt/temperature) and set confidence bands for UI fallbacks.

## 7. JSONL Schema

```
{
  "text": "Sample journal entry...",
  "expected_category": "Growth|Challenge|Achievement|Planning|Learning|Research",
  "expected_mood": "free_text_label (e.g., Excited/Reflective/Frustrated)",
  "expected_energy": "high|medium|low",
  "confidence_range": [
    80,
    90
  ],
  "business_context": "short rationale"
}
```

An export with 72 balanced entries has also been saved as JSONL for direct training:  
*/mnt/data/blueprint\_sentiment\_training\_dataset.jsonl*