Could your B2B2C channel work better?

Use these questions to investigate a channel and design your next experiment.

Download and open in Adobe Acrobat Reader. Type into the shaded boxes and save your copy. Keep answers brief; use a separate document for longer notes.

Channel or offering

Business outcome + time window

DECISION + QUESTIONS	YOUR WORKING ANSWER
1. Find the friction Where does participation break down: buyer commitment, sharing, consumer engagement, or conversion? What evidence supports that?	
2. Understand both audiences What makes this worth sharing for the buyer and worth using for the consumer? Who actually does the sharing?	
3. Align the promise What value stays consistent? What changes in the message, format, language, or access details for each audience?	
4. Design a small test What can you test with existing resources? What evidence would justify continuing, changing direction, or stopping?	
5. Support distribution What helps customers follow through? Who internally can support them and bring feedback back to you?	
6. Measure and improve How will you distinguish sharing, engagement, and conversion? What remains unknown, and what will you change based on what you learn?	

Start with curiosity: what would solving this make possible, and do you have enough evidence and resources to test a working hypothesis?

Decide where AI fits

Choose task by task. Keep people accountable in every mode.

Use AI where it improves the work. Preserve the expertise, relationships, and judgment that make the experience valuable.

MODE	WHEN IT FITS	EXAMPLE
Human-led	Human expertise, trust, or consequential judgment create the value.	Customer conversations; positioning decisions; expert-led content.
AI-assisted	AI drafts or analyzes; a person directs, checks, and decides.	Message variants; edit suggestions; feedback synthesis.
Automated	Inputs and rules are stable, outputs are checkable, and a fallback is clear.	Scheduled data refresh with validation and alerts.

Before choosing: where does human involvement add value? What happens if AI is wrong? What data is approved? Do the gains justify review, rework, and tool costs?

Task + intended outcome

Chosen mode

Choose a mode

Why this mode? What stays human?

Inputs, tools + data boundaries

Quality checks + accountable owner

Pause trigger + fallback

How will you know it helps?

Compare total time, review, rework, upkeep, costs, and quality. Where will saved time go?

Turn your answers into an experiment

Set the test, measure each step, and decide what happens next.

We believe...

[Audience] is not taking [action] because [barrier].

We will test...

[Change] with [group] over [time period], compared with [baseline or comparison].

We will look for...

[Behavior or outcome] alongside [customer feedback], to decide [what happens next].

STAGE	EVENT + DATA SOURCE	BASELINE TO TARGET
Buyer participation		
Distribution		
Consumer engagement		
Consumer conversion		
Business value		

Define the conversion event and the later revenue or value event separately. Use consistent time windows and denominators; label modeled value and assumptions.

Continue, change, or stop if...

Next action, owner + review date

Pair the numbers with customer feedback. Consider seasonality and other campaigns. Attribution identifies touchpoints; a credible comparison or controlled test helps estimate incremental impact.