

# Holdout-Test Readiness Worksheet

Use this before a marketing budget move depends on causal proof instead of attribution credit.

## 1. Budget decision

Decision to make: \_\_\_\_\_

Spend at risk: \_\_\_\_\_ Decision date: \_\_\_\_\_

Channel / campaign / audience / geography: \_\_\_\_\_

## 2. Current evidence

Current best read: attribution / MMM / platform report / CRM / finance view / other

What this evidence is safe to support: \_\_\_\_\_

What it cannot prove yet: \_\_\_\_\_

## 3. Readiness checks

Spend is material enough that a directional read is not enough.

Treatment can be isolated by geo, audience, account group, or campaign eligibility.

Control group can stay clean without sales, CS, or platform contamination.

Measurement window fits the sales cycle or a trusted leading metric.

Outcome metric is agreed before launch and will not change mid-test.

Leadership has pre-agreed actions for positive, flat, negative, or inconclusive results.

## 4. Decision rule

Attribution enough: tactical, reversible, and mostly about observed path learning.

MMM enough: portfolio-level allocation, not one isolatable tactic.

Test later: important decision, but isolation, timing, or outcome trust is not ready.

Run holdout now: material spend, clean split, trusted outcome, and action will change.

Selected path: attribution enough / MMM enough / test later / run holdout now

Reason: \_\_\_\_\_

## 5. Next proof needed

Owner: \_\_\_\_\_ Review meeting: \_\_\_\_\_

First repair or test-design step: \_\_\_\_\_

Caveat that must travel with the result: \_\_\_\_\_

## Domain Methods note

If the fight is spend confidence, start with Where Did the Money Go? If the attribution model and caveats need rebuilding, start with SaaS Marketing Attribution.