

Product Event Contract and Tracking Plan Worksheet

Govern one important event before it feeds AI, PQL, lifecycle, or revenue workflows.

Bring one real event and one downstream use. Keep the contract narrow enough to review in 45 minutes.

1. Decision and event definition

Decision or workflow this event is allowed to support:

Canonical event name, retired aliases, and event version:

Plain-English meaning, exact trigger, and exclusions:

Entity/grain, source system, business owner, and technical owner:

2. Identity and time rules

Stable user, workspace, account, or subscription identifiers:

Anonymous-to-known stitching and multi-workspace/account rules:

Event time, processing time, timezone, dedupe, and expiry:

Late arrival, replay, and backfill behavior:

3. Properties and downstream consumers

Required properties, allowed values, types, and null/default rules:

Sensitive-property, consent, retention, or regional constraints to review:

Metrics, experiments, scores, audiences, CRM fields, or prompts that consume it:

Reason code, timestamp, source, or caveat that must travel downstream:

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4. QA and change control

Positive test case and expected event payload:

Negative cases: retries, tests, employees, replays, incomplete flows, or bad matches:

Change approvers, compatibility period, and downstream notification path:

Monitoring threshold, pause rule, rollback owner, and first review date:

5. Allowed and forbidden uses

Allowed now: directional analysis / experiment / reviewed route / limited automation:

Human review required before this event changes work:

Forbidden until repaired: AI action / customer message / revenue or board claim / other:

Evidence or control needed to earn the next confidence level:

6. Worked example and review decision

Real user, workspace, or account example reviewed in the meeting:

What could make this event look correct while the workflow is wrong:

Decision: approve / approve with limits / not ready:

Named repair owner, due date, and next route: AI Diagnostic / Data Foundation / \$500K:
