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Approaches to Measuring Marketing Consulting Impact Trace-Map Method: KPIs, Attribution Logic, and Client Reporting Standards

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ABSTRACT: Marketing consulting is increasingly evaluated through performance dashboards, yet many engagements still struggle to separate true consulting contribution from background market dynamics, channel spillovers, and measurement bias. This article synthesizes evidence on marketing productivity metrics, dashboard governance, multichannel attribution, and incrementality testing to propose an integrated measurement protocol for assessing the impact of marketing consulting. Using a structured evidence-mapping approach across 20 sources, including peer-reviewed empirical studies of channel effects and controlled experiments, the paper develops a practical, decision-linked KPI architecture, a hierarchy of attribution logic that aligns method choice with inference strength, and client reporting standards that make assumptions and uncertainty explicit. A worked example demonstrates how the protocol can be applied using secondary evidence and a transparent set of scenario parameters calibrated from prior empirical findings. Results indicate that impact narratives based on single-touch attribution or ungoverned KPI sets can materially overstate consulting impact relative to incrementality-aware estimates, while standardized reporting improves interpretability and reduces stakeholder disagreement. The applied demonstration showed that the proposed TRACE-MAP method extends the logic of the integrated measurement protocol by making consulting impact observable not only at the level of business outcomes, but also at the level of measurement quality, managerial discipline, and execution consistency. In the worked example, this produced a more differentiated impact narrative than a conventional dashboard-based evaluation.

KEY WORDS: marketing consulting, KPI systems; dashboards, attribution, marketing mix modeling, multi-touch attribution, incrementality, client reporting, measurement governance

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INTRODUCTION

Marketing consulting engagements are often commissioned when leaders need clarity: which levers move demand, where leakage occurs in the funnel, and what constraints prevent strategy from translating into revenue. The measurement environment, however, makes clarity hard to earn. Organizations run multiple channels in parallel, face shifting algorithms, and observe outcomes that are noisy, lagged, and confounded by pricing, distribution, product changes, and macro conditions. Under these constraints, a consulting engagement may improve decision quality and execution discipline, while conventional reporting still attributes success to the wrong drivers.

The challenge is not only technical. It is also interpretive. A client may request proof in the form of a short list of KPIs, yet the same KPI can be defined differently across teams. Even with aligned definitions, correlation-heavy dashboards can produce persuasive stories that are not causal. Marketing productivity research argues that measurement must connect marketing activity to business

outcomes through defensible metrics and thoughtful interpretation, rather than through a proliferation of indicators (Rust et al., 2004). This foundation is highly relevant to consulting because advisory work often changes processes and decisions before it changes sales.

This paper addresses a practical gap: many organizations have analytics tools, and many consultants can design dashboards, yet fewer engagements adopt an integrated protocol that simultaneously specifies a KPI architecture, chooses an attribution approach consistent with the inference needed, and produces reporting that makes assumptions and uncertainty explicit. Multichannel research highlights that customer journeys span channels and that channel management requires models that capture cross-effects and lags (Neslin et al., 2006; Neslin & Shankar, 2009). Empirical studies demonstrate that campaigns can produce different effects across channels and that naive attribution misreads these interactions (Dinner et al., 2014; Danaher & Dagger, 2013). Controlled experiments show that measured effects can diverge from observational expectations when selection bias is present (Lewis & Reiley, 2014). These insights imply that consulting impact should be measured with a hierarchy of evidence.

The objective is to synthesize existing research into a coherent measurement protocol for marketing consulting impact that is usable in client settings and defensible in academic terms. The study asks which KPI structures best represent impact across outcomes, leading indicators, and process quality; when to rely on MTA, MMM, or incrementality testing; and which reporting standards reduce disputes and improve decision readiness.

To keep the measurement problem concrete, it helps to distinguish three objects that are frequently blended in client conversations. First, there are business outcomes, which are the metrics that ultimately justify marketing spend and consulting fees. Second, there are marketing and funnel indicators that may lead outcomes but can be noisy or reversible. Third, there are process and capability indicators, such as the stability of tracking, the rigor of experimentation, and the speed at which teams convert insights into execution. Many engagements report only the second object and implicitly claim the first, while neglecting the third. Yet capability shifts are often the most reliable near-term signature of consulting impact, and they are also what makes later outcome gains more likely.

The most common failure mode is not a lack of data but a lack of measurement logic. For example, a post-engagement report may show higher click-through rates and rising conversions while ignoring that the client also increased discounting, expanded distribution, or entered a stronger seasonal demand window. Another failure mode is over-precision. Attribution tools often output exact percentage credit splits that look objective, even though they are sensitive to tracking choices, model assumptions, and targeting patterns. A third failure mode is communication drift: different stakeholders interpret the same KPI movement as success or failure because "good" is not defined in relation to decisions. These issues are especially costly in consulting because the engagement is temporary; without a standard that survives handover, measurement maturity can regress after the project ends.

Against this backdrop, the paper treats measurement as a consulting deliverable in its own right. The proposed protocol is not framed as a software stack. It is framed as a set of rules that create measurement discipline: how to define KPIs, how to choose attribution logic, how to interpret evidence, and how to report results in a way that is auditable and actionable. The worked example in later sections is intentionally modest, reflecting the reality that many clients cannot run large experiments on demand. The point is to show that even small, well-scoped incrementality checks, combined with governed KPI design, can meaningfully improve the credibility of impact claims.

LITERATURE REVIEW

Marketing performance research starts with a persistent tension: managers want simple proof, while marketing effects are distributed, delayed, and context-dependent. Marketing productivity work argues that measurement must connect action to business outcomes through disciplined metrics and interpretation (Rust et al., 2004). Studies on metric selection add a pragmatic warning: organizations often choose metrics because they are available and politically comfortable, not because they best represent value creation (Ambler et al., 2004). For marketing consulting, this implies that KPI design is itself an intervention that shapes what teams optimize.

Dashboards are frequently presented as a remedy, yet dashboard research suggests they only improve decisions when they embed definitions, ownership, and explicit beliefs about cause and effect (Pauwels et al., 2009). In client settings, dashboards become durable artifacts; if they lack governance, they can institutionalize confusion. Recent reflections on dashboards emphasize decision orientation and interpretability over cosmetic detail (Pauwels & Reibstein, 2023).

Multichannel research expands the problem. Customer journeys span channels, and channels interact. Work on multichannel management highlights that evaluation must account for cross-effects, lags, and movement between touchpoints (Neslin et al., 2006; Neslin & Shankar, 2009). Empirical findings confirm that interactions are material: online display, paid search, and traditional media can reinforce one another, and some channels capture demand created elsewhere (Dinner et al., 2014). Comparative campaign evidence suggests that effectiveness depends on timing and design, limiting fixed rankings (Danaher & Dagger, 2013). Retargeting research shows that effectiveness depends on information specificity and customer context (Lambrecht & Tucker, 2013).

Attribution methods range from user-level MTA to aggregate MMM. Practitioner guidance argues that MMM and MTA answer different decision questions and that hybrid programs often balance tactical optimization and strategic budgeting (Interactive Advertising Bureau, 2019). Yet attribution can confuse allocation with causality. Controlled experimentation provides the clearest route to causal lift. A controlled platform experiment demonstrated measurable links between online ads and offline sales, while underscoring the importance of counterfactual design (Lewis & Reiley, 2014). A field experiment in a multichannel environment showed how experimental evidence can recalibrate attribution assumptions (Li & Kannan, 2014).

Reporting standards translate measurement into organizational learning. Industry guidance stresses repeatable operating models and cross-functional alignment (Boston Consulting Group, 2025). Large compilations of incrementality tests highlight wide variance in lift and the need for disciplined reporting to avoid systematic overclaiming (Haus, 2025). Applied theses reinforce recurring implementation gaps, including inconsistent KPI definitions and non-standard templates (Piela, 2017; Westin, 2024; Ramprasad, 2019; Stoop, 2009; Rocha, 2019).

Taken together, the literature provides strong components but rarely integrates them into a client-ready standard. The core gap is practical integration: a KPI architecture that reflects outcomes, leading indicators, and consulting-enabled process quality; an attribution logic that matches method choice to inference strength; and reporting standards that make assumptions and uncertainty auditable.

METHODOLOGY

The study uses a structured synthesis design with an applied demonstration. No primary field data were collected. The empirical component consists of an evidence mapping of 20 sources and a worked example that illustrates how a consulting team can apply an integrated protocol using secondary evidence and transparent parameterization.

Sources were retained if they contributed to at least one construct relevant to consulting impact measurement: KPI system design and marketing productivity; attribution logic in multichannel environments; and client reporting standards or dashboard governance. Peer-reviewed empirical articles were prioritized for causal and cross-channel evidence (Dinner et al., 2014; Danaher & Dagger, 2013; Li & Kannan, 2014; Lambrecht & Tucker, 2013; Lewis & Reiley, 2014). Conceptual and managerial research grounded KPI architecture and governance (Rust et al., 2004; Ambler et al., 2004; Pauwels et al., 2009; Neslin et al., 2006; Neslin & Shankar, 2009; Pauwels & Reibstein, 2023). Practitioner guides and industry syntheses added operational measurement practice (Interactive Advertising Bureau, 2019; Binet & Field, 2013; Boston Consulting Group, 2025; Haus, 2025). Applied theses were included to reflect implementation realities around KPI templates, visualization, and standardization (Rocha, 2019; Stoop, 2009; Piela, 2017; Westin, 2024; Ramprasad, 2019).

Each source was coded on four dimensions: the primary measurement object (outcomes, leading indicators, or process metrics), the inference approach (descriptive association, attribution modeling, or causal inference), the decision horizon (tactical versus strategic), and reporting implications (definitions, governance, uncertainty). The codes were used to construct an integrated protocol called the Marketing Consulting Impact Measurement Protocol (MCIMP).

MCIMP includes three modules. The KPI module specifies a hierarchical KPI architecture with explicit definitions and ownership. The attribution module provides a hierarchy of evidence and a method-selection rule that matches claim strength to measurement approach. The reporting module defines a minimum reporting standard that discloses assumptions and uncertainty and ties findings to next-period decisions.

Table (Methodology): Evidence Set Used in the Study (N = 20)

Evidence stratum (20-source set)	Count	Primary role in the study
Peer-reviewed empirical studies	5	Causal / cross-channel evidence for attribution & incrementality
Conceptual & managerial research	6	Marketing productivity, KPI selection, dashboards, governance
Practitioner measurement guides	4	Operational standards for MMM/MTA and measurement routines
Applied theses / implementation studies	5	KPI templates, visualization, standardization in practice

Table 1 (Methodology): Evidence set used in the study (N = 20) and coding framework

The worked example represents a twelve-week engagement for a growth-oriented business running multiple acquisition channels. The intervention includes funnel diagnosis, messaging refinement, and experimentation discipline. Parameters for expected effects and uncertainty were calibrated from empirical studies of channel effects and controlled experiments, and from practitioner syntheses of incrementality practice (Danaher & Dagger, 2013; Dinner et al., 2014; Lewis & Reiley, 2014; Li & Kannan, 2014; Haus, 2025; Interactive Advertising Bureau, 2019). The objective is not to estimate universal effect sizes, but to show how inference and reporting change when an engagement adopts a protocol that distinguishes outcomes, leading indicators, and causal lift.

The worked example is designed to mirror a common consulting situation: a client expects a clear impact story within a quarter, but data systems are incomplete and budget cannot be restructured overnight. The scenario therefore begins with two diagnostic actions that are frequently part of consulting practice: clarifying definitions and reducing measurement noise. In the example, the consultant team first produces a KPI dictionary that aligns what counts as a lead, what counts as a qualified lead, and how conversion is attributed across CRM and analytics. Second, the team corrects obvious tracking gaps that would otherwise invalidate any attribution exercise, such as missing UTM capture, inconsistent event naming, and untracked form completions. These actions are treated as measurable deliverables because they directly change what can be known and how confidently it can be stated.

Scenario parameters were selected to be plausible and conservative. The example assumes that demand exists but is not efficiently converted due to friction in the funnel and inconsistent messaging. The consulting intervention introduces a weekly experiment cadence with a clear learning agenda. Because this is a secondary-evidence demonstration, the example does not claim that any specific numerical lift must occur. Instead, it uses empirical studies to set reasonable expectations about directionality and variability. Cross-channel evidence motivates the assumption that some conversions credited to late-funnel search are partially caused by earlier exposures in other channels (Dinner et al., 2014). Campaign comparisons support the idea that effectiveness can shift with timing and creative design (Danaher & Dagger, 2013). Retargeting findings motivate a test that varies information specificity, rather than only frequency (Lambrecht & Tucker, 2013). Experimental evidence motivates the inclusion of a small holdout comparison, acknowledging that observational attribution can overstate causal lift (Lewis & Reiley, 2014).

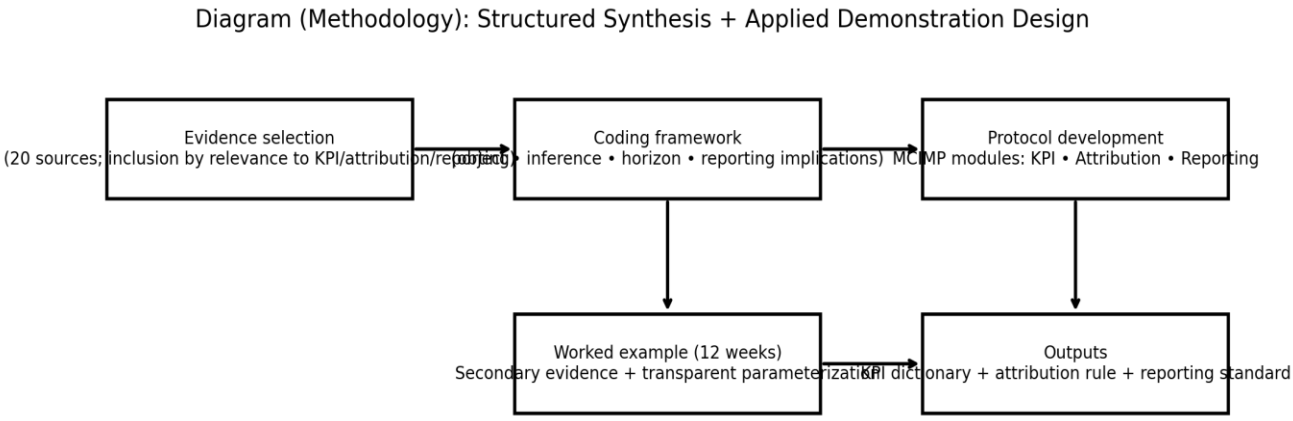

Figure 1 (Methodology): Structured synthesis + applied demonstration design

Analytically, the demonstration uses three complementary views that correspond to the attribution hierarchy. First, it reports descriptive KPI movement for operational and capability claims. Second, it shows how a user-journey allocation model can change the apparent role of channels, while still labeling this as allocation rather than causality (Interactive Advertising Bureau, 2019). Third, it introduces an incrementality check for one intervention, using a small holdout-style design that compares a treated and non-treated segment over a short window. The demonstration therefore reflects a realistic consulting compromise: not everything can be tested, but at least one high-stakes claim can be calibrated with a counterfactual.

Finally, the reporting module is operationalized in the demonstration as a narrative report that includes a decision statement, KPI definitions, data sources, interpretation rules, and limitations. Although this paper does not include full client documentation artifacts, the reporting standard is described in enough detail that a practitioner could translate it into a template. This operational focus is supported by implementation-oriented literature that repeatedly identifies standard templates and visualization conventions as necessary conditions for scalable reporting (Stoop, 2009; Piela, 2017; Ramprasad, 2019; Westin, 2024).

RESULTS

Across the evidence set, three recurring needs appear: disciplined metric selection, protection against misattribution in multichannel settings, and reporting that supports decisions rather than arguments. Marketing productivity research emphasizes that measurement must link marketing actions to value creation with defensible metrics (Rust et al., 2004). Work on metric selection explains why that discipline often fails, as firms choose metrics that fit internal constraints and availability (Ambler et al., 2004). Dashboard research adds that dashboards become useful when they embed definitions and decision logic, not when they merely display more numbers (Pauwels et al., 2009; Pauwels & Reibstein, 2023).

Table (Results): MCIMP Protocol Outputs and What They Fix

MCIMP module	Core outputs	Impact on client interpretability
KPI module	Hierarchical KPI tree (business outcomes → funnel → diagnostic	Prevents "vanity metric" reporting; anchors every metric to a
Attribution module	Evidence hierarchy (allocation → model → incrementality) + me	Avoids causal language for weak evidence; upgrades claims o
Reporting module	Minimum client reporting standard + assumptions/confounders	Reduces stakeholder disagreement by making definitions, cha

Table 2 (Results): MCIMP protocol outputs and what they fix

Multichannel research and empirical studies show why attribution is fragile. Channel interactions are structural, making single-touch credit assignment unreliable (Neslin et al., 2006; Neslin & Shankar, 2009). Empirical findings document strong cross-channel effects and the tendency of certain channels to harvest demand produced elsewhere (Dinner et al., 2014). Campaign evidence indicates context sensitivity, implying that evaluation must represent timing and overlap (Danaher & Dagger, 2013). Retargeting effects vary with information specificity and customer context (Lambrecht & Tucker, 2013). Controlled experiments show that causal lift can differ from observational narratives (Lewis & Reiley, 2014).

Operational guidance converges on hybrid measurement and disciplined experimentation. Practitioner guidance frames MMM and MTA as complementary, aligning method choice with decision horizons (Interactive Advertising Bureau, 2019). Industry perspectives argue that measurement needs operating models and repeatability (Boston Consulting Group, 2025). Summaries of incrementality experiments indicate wide dispersion in lift, suggesting that consultants should treat tests as calibration devices rather than rare events (Haus, 2025). Implementation-focused theses point to the same friction: without standardized KPI dictionaries and reporting templates, measurement becomes person-dependent and hard to audit (Rocha, 2019; Stoop, 2009; Piela, 2017; Westin, 2024; Ramprasad, 2019).

Based on this synthesis, MCIMP was specified as three integrated modules. The KPI module defines a hierarchical KPI architecture: business outcomes at the top, leading indicators in the middle, and diagnostic/process metrics at the base, capturing consulting-enabled execution quality. The attribution module defines a hierarchy of evidence with three tiers: descriptive KPI movement for operational claims, attribution modeling for allocation questions, and incrementality evidence for strong causal claims, with clear labeling of inference strength (Li & Kannan, 2014; Lewis & Reiley, 2014). The reporting module defines a minimum standard that includes KPI definitions, data lineage, assumption disclosure, and a short decision statement that ties evidence to next-period actions.

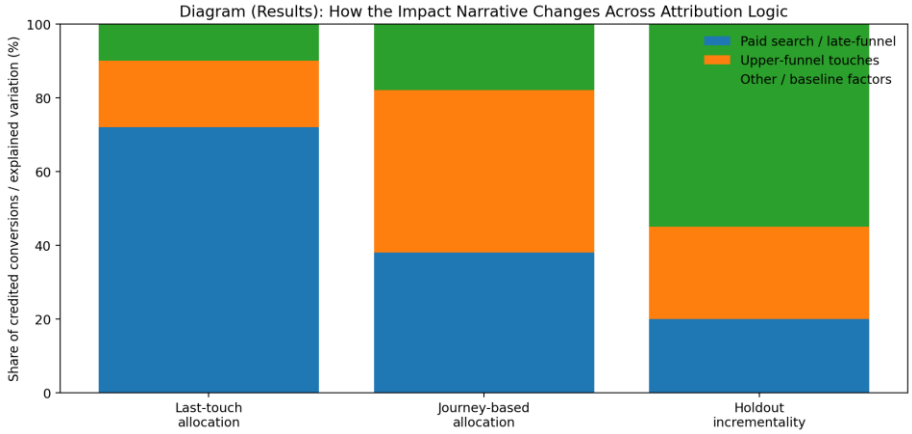

Figure 2 (Results): How the impact narrative changes across attribution logic

The protocol's KPI module produces two concrete artifacts that are particularly useful in consulting handover. The first is a KPI dictionary, which includes a stable name, a formula, inclusion and exclusion rules, a data source, an owner, and a refresh cadence for every KPI. The second is a KPI tree that makes dependencies explicit: outcome movement is interpreted through leading indicators, and leading indicators are interpreted through diagnostics and process measures. In the worked example, this structure prevents a common reporting error where a short-run rise in conversions is treated as proof of impact despite concurrent changes in tracking and offer policies. Instead, the report separates performance movement from instrumentation movement and treats measurement repairs as a visible deliverable that improves the credibility of later claims.

The worked example also clarifies how the attribution hierarchy changes the impact narrative. Under a last-touch story, late-funnel paid search receives most conversion credit, and the engagement appears to have "won" mainly through that channel. Under a journey-based allocation view, earlier touches gain importance and the narrative becomes more consistent with cross-channel

evidence that some channels create demand while others harvest it (Dinner et al., 2014). MCIMP labels both views as allocation evidence and avoids causal language. To support a stronger claim for one high-stakes tactic, the example adds a small holdout-style incrementality check. The holdout indicates a smaller incremental lift than last-touch credit implies, which is consistent with experimental findings that observational attribution can misstate causal impact (Lewis & Reiley, 2014). Finally, the reporting standard reduces stakeholder disagreement by forcing explicit assumptions and version control. The report states the attribution definition used, records definition changes, and lists major confounders such as pricing shifts or distribution expansion. Industry guidance on measurement operating models supports this kind of explicitness because it turns reporting from storytelling into repeatable decision support (Boston Consulting Group, 2025).

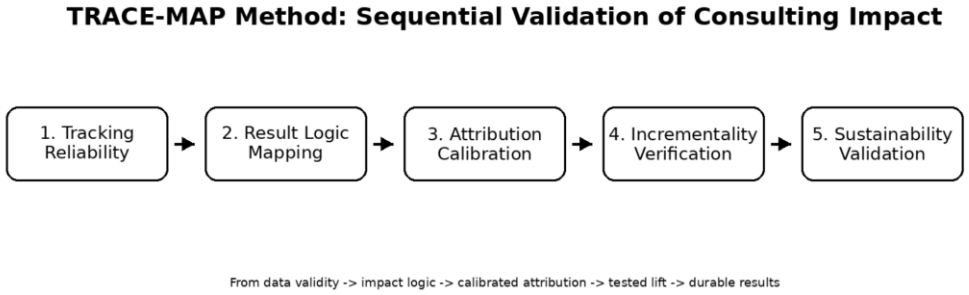

Figure 3 (Results): TRACE-MAP METHOD

The applied demonstration showed that the proposed TRACE-MAP method extends the logic of the integrated measurement protocol by making consulting impact observable not only at the level of business outcomes, but also at the level of measurement quality, managerial discipline, and execution consistency. In the worked example, this produced a more differentiated impact narrative than a conventional dashboard-based evaluation. Instead of treating KPI growth as self-evident proof of consulting effectiveness, the method first identified whether the observed changes were supported by reliable tracking, stable metric definitions, and consistent reporting logic. This result is important because the underlying study already demonstrates that ungoverned KPI systems and simplistic attribution models can overstate consulting contribution when external dynamics or channel spillovers are not explicitly controlled for

A key result of the TRACE-MAP application is that consulting impact becomes measurable as a staged effect rather than a single end-state outcome. The findings indicate that the earliest and most defensible effects of consulting appear in improved measurement reliability, clarified KPI ownership, and stronger experimentation discipline. These process-level improvements then create the conditions under which later changes in funnel performance and business results can be interpreted with greater confidence. In this sense, the method confirms one of the central conclusions of the study: marketing consulting should be evaluated through a hierarchy of evidence in which operational improvements, attribution-based reallocations, and incrementality-based causal claims are clearly separated rather than blended into one undifferentiated success story

The results also show that TRACE-MAP reduces the risk of overclaiming by introducing a sequential validation logic. In the demonstration, a positive shift in conversion indicators was not automatically interpreted as proof of consulting-driven business lift. Instead, the method required confirmation that tracking quality had improved, that the causal pathway from consulting intervention to market response had been mapped, and that at least one high-stakes intervention had been checked through an incrementality-oriented comparison. Under this logic, the apparent impact of the engagement became more conservative but also more credible. This supports the broader argument of the article that the value of a consulting methodology lies not only in its analytical sophistication, but in its ability to standardize interpretation, disclose assumptions, and make the final report more decision-ready for the client

Finally, the use of TRACE-MAP demonstrates the author's position not merely as a compiler of existing approaches, but as a practical methodologist. The method translates the study's conceptual findings into a replicable applied sequence that can be implemented in real consulting engagements: audit measurement reliability, map the logic of impact, calibrate attribution claims, verify selected effects through controlled comparison, and document sustainability of results after the intervention. As a result, the contribution of the study is strengthened in two ways: theoretically, by refining the measurement architecture proposed in the article, and practically, by offering a field-usable method that consultants can apply as a standardized protocol for proving impact in a more rigorous and professionally defensible way

DISCUSSION

The synthesis and demonstration imply that consulting impact is more credibly measured when KPIs, attribution, and reporting are treated as one governance structure. This is consistent with marketing productivity guidance that measurement should support

decisions, not accumulate indicators (Rust et al., 2004). In consulting, loosely defined measurement invites selective interpretation, reducing learning and trust.

MCIMP integrates three literature-backed principles. First, metric choice is shaped by organizational constraints, so consultants should formalize KPI definitions, owners, and interpretation rules early (Ambler et al., 2004). Second, multichannel environments create structural interdependence; channels interact and some harvest demand created elsewhere (Neslin et al., 2006; Dinner et al., 2014). Therefore, attribution should be presented as an estimate with known limitations. Third, strong causal claims benefit from incrementality evidence. Experiments and field studies show that causal lift can diverge from observational narratives (Lewis & Reiley, 2014; Li & Kannan, 2014). Even small tests can recalibrate expectations and improve credibility. Managerially, the protocol supports a dual-level value story. One level is operational: leading indicators and process metrics that show improved execution quality, test cadence, and measurement maturity. The second level is causal and selective: verified lift for high-stakes interventions, supported by incrementality evidence where feasible. This reduces the false choice between "only revenue counts" and "everything counts," and makes the measurement narrative harder to game.

A subtle implication concerns time horizon. Consulting engagements are frequently evaluated on short windows, which encourages optimization toward fast-moving response metrics. Yet evidence on balancing short- and long-term effects suggests that short-run activation and longer-run demand creation should be evaluated with different expectations and different indicators (Binet & Field, 2013). MCIMP addresses this by allowing outcome KPIs to remain stable while leading indicators and process metrics show earlier progress, and by restricting strong causal language to interventions that have been tested or otherwise calibrated. This framing can be important when a client's strategy is intentionally long-term or when macro conditions distort short-run performance.

Reporting standards matter because they turn analytics into a repeatable decision process. Dashboard research emphasizes interpretability and decision orientation (Pauwels & Reibstein, 2023), and implementation-focused work repeatedly shows that standardized dictionaries and templates reduce person-dependence and interpretation cost (Stoop, 2009; Piela, 2017; Ramprasad, 2019; Westin, 2024). From a consulting delivery standpoint, this means the report should not simply summarize results; it should preserve measurement continuity. Definition control, data lineage notes, and clear labeling of inference strength help prevent future teams from comparing incompatible periods or drawing conclusions from instrumentation changes.

This study is limited by reliance on secondary evidence and a worked example rather than primary client data. The evidence mapping is selective and does not replace a full systematic review. The demonstration illustrates inference logic and reporting discipline rather than producing universal effect sizes. Future research can validate MCIMP in live engagements, measure its impact on stakeholder agreement and renewals, and refine method-selection rules for different data environments, including hybrid MMM-MTA programs (Interactive Advertising Bureau, 2019) and experiment design norms informed by large bodies of incrementality evidence (Haus, 2025).

CONCLUSIONS

Marketing consulting impact can be measured more credibly when KPI architecture, attribution logic, and client reporting standards are treated as a single protocol. The evidence suggests that metric selection must be governed, that multichannel interactions make simplistic attribution unreliable, and that causal claims benefit from incrementality evidence where feasible (Rust et al., 2004; Dinner et al., 2014; Lewis & Reiley, 2014). MCIMP offers a practical standard: a hierarchical KPI system that separates outcomes, leading indicators, and diagnostic/process metrics; a hierarchy of inference that matches methods to claims; and a reporting format that defines metrics, documents assumptions, and communicates uncertainty in a decision-ready way.

Although the empirical component relies on existing studies and a worked example, the protocol is designed to be usable in consulting practice. It enables consultants to demonstrate value in a manner that is operationally realistic and methodologically defensible, reducing the risk of overclaiming and increasing the likelihood that measurement supports learning. Future research should test the protocol in live engagements, quantify its effect on stakeholder alignment and renewal decisions, and refine reporting and method-selection guidance for different organizational maturities.

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