TEMPLATE P09 · BASELINE

Baseline

Measures the starting position of the value hypothesis metrics, with a reproducible method, so that subsequent value is incremental and verifiable.

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01

Instructions for use

Aspect	Guidance
When it is used	In phase 2, before G2, in parallel with the value hypothesis canvas (P08). The baseline is frozen at G2 and used in phases 5, 6 and 7.
Who completes it	The AI Product Owner, with the owner of the process data. Management control reviews the unit values.
Who verifies it	Lite: AI Office. Enterprise: AI Auditor.

Aspect	Guidance
Who decides	It is approved with G2: sponsor (Lite) · AI Committee (Enterprise).
Gate at which it is reviewed	Hypothesis. It is consulted again at G5, R6 and G7. (G2)
Tool	T11 · Value hypothesis canvas and calculator.
Lite versus Enterprise	Lite may omit the fields and blocks marked **(Enterprise)**. The definition of metrics, the period, the method and the results are mandatory in both.

Completion rules:

- The baseline is **measured**; it is only estimated if it is justified why it cannot be measured and how this will be corrected (01 §6.4).
- "No data" is not zero: missing data is shown as missing and is never filled in without saying so (rule 8).
- The metrics must be **the same**, with the same definition, as those that will be used to measure the result.

02

Identification

Field	Content	Guidance
Use case code		IA-AAAA-NNN.
Use case name		
Version of the associated canvas		Version of P08 to which this baseline corresponds.
Document version		
Date		DD-MM-AAAA.
Author		Name and role.
Freeze date		Date of G2. Thereafter it is only modified in accordance with section 9.

03

Definition of the metrics

Metric	Type	Operational definition	Formula	Unit	Data source	Data owner
	Main · Secondary · Safeguard					
(illustrative example) **Average time to first response**	Secondary	Hours from receipt of the query to the first useful response to the customer	Sum of times ÷ no. of queries	hours	Customer service tool	Head of customer service operations
(illustrative example) **External customer service hours**	Main (economic)	Hours invoiced by the external customer service supplier	Monthly sum of invoiced hours	h	Supplier invoices	Management control

The operational definition answers: what is counted, what is excluded, from when and until when, and in which system it is recorded.

04

Measurement period and method

Field	Content	Guidance
Reference period		Start and end dates.
Justification of the duration		It must cover the relevant cycles of the process (weeks, months, campaigns).
Scope or population		Channels, units, customers or cases included.
Sample (Enterprise)		If the whole population is not measured: size, selection criterion and representativeness.
Measured or estimated		Measured · Estimated. If estimated, justification and plan to measure it before G5.
Extraction method		Query, report or system from which it is obtained.

Field	Content	Guidance
Exclusions		Cases excluded and reason.
Treatment of missing data		How they are shown and how many there are.
Data quality		Completeness and known problems.

05

Baseline results

Metric	Period	Value	Variability	No. of observations	Status	Remarks
			Minimum–maximum or standard deviation		Measured · Estimated · No data	
(illustrative example) **Average time to first response**	01-01-2026 to 30-06-2026	26.4 h	9.1–41.7 h (monthly average)	96,300	Measured	Peaks during January campaigns.
(illustrative example) **External customer service hours**	01-01-2026 to 30-06-2026	5,150 h	610–1,240 h/month	6 invoices	Measured	—
(illustrative example) **Satisfaction of the customer served**	01-01-2026 to 30-06-2026	No data	—	—	No data	The survey is activated in October; it will be measured four weeks before the pilot.

06

Unit values for translation into money

Item	Unit value (€)	Source	Reference date	Reviewed by management control
				Yes · No
(illustrative example) **Cost per hour of external customer service**	21.00	Current contract with the supplier	01-06-2026	Yes
(illustrative example) **Average margin per order**	9.00	Channel income statement	First half of 2026	Yes

The unit values are used in the P08 formula (units × unit value). If they change after G2, this is recorded in section 9.

07

Control group

Complete if the attribution method in P08 is a control group.

Field	Content	Guidance
Definition of the control group		Which cases, customers or units do not receive the intervention.
Assignment criterion		Random, by region, by shift or other, with justification.
Comparability		Baseline values in the control group and in the treated group.
Risk of contamination		How the control group is prevented from receiving effects of the intervention.

Metric	Treated group (baseline)	Control group (baseline)	Difference	Comparable?
				Yes · No

08

External factors and seasonality

Factor	Expected effect on the metric	How it is corrected or controlled
(illustrative example) **Sales campaign**	60% increase in queries in January	Compare with the same period of the control group and not with the annual average.

09

Freeze and subsequent changes

After G2, the baseline may only be modified because of a documented material error or a change in the definition of a metric, with the approval of the body that authorised the use case. Modifying it to favour the result is a nonconformity.

Date	Metric	Previous value	New value	Reason	Approved by

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Reproducibility (**Enterprise**)

Field	Content	Guidance
Query or calculation procedure		Link to the versioned query, script or report.
Version or snapshot of the data		Identifier of the extraction used.
Location		Repository where it is kept.
Person able to reproduce it		Different from whoever calculated it.

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Quality criteria

The formal G2 criteria are in document 21 (see criteria G2.xx).

#	Check	Status
1	Each P08 metric has an operational definition, formula and source.	Met · Not met · Not applicable · Pending
2	The period covers the relevant cycles of the process.	
3	The baseline is measured or its estimate is justified with a measurement plan.	
4	Missing data appears as "no data".	
5	The unit values have a source and management control review.	
6	If there is a control group, its comparability is demonstrated.	
7	The freeze date is recorded.	

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Approval and verification

Function	Role in SEVEN-G	Name and position	Date	Signature or reference
Prepares	AI Product Owner			
Provides data	Owner of the process data			
Reviews unit values	Management control			
Verifies	AI Office (Lite) · AI Auditor (Enterprise)			
Decides	AI Sponsor (Lite) · AI Committee (Enterprise), with G2			

Segregation of duties: the verifier has not calculated the baseline.

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Version control

Completed document

Version	Date	Author	Changes

Template

Version	Date	Changes
0.1	16-09-2026	First version. Structure aligned with 01 §6.4 and with measurement rules 1 and 8 in 00 §6.