

Test an income idea

Move from an interesting idea to a customer test. Use AI to organize evidence, make a sample, prepare an offer, and review what happened while you own the customer relationship and delivery.



Editorial illustration. The worked examples inside are labeled teaching scenarios.

Ashley Kays / How I Build with AI

Read the example. Adapt the prompt. Make something useful.

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START HERE

Make this workbook yours

A practical workbook. Examples are illustrative; replace them with your project.

THE OUTCOME

Leave with one experiment card, a realistic sample, a bounded offer, a plan to reach relevant people, and a decision method that accounts for your time and costs.

Read the teaching page for each step, then use the visual and prompt page to adapt the work. Keep your decisions, evidence, and review notes together. The spaces are designed for handwriting or PDF annotation.

[Open the complete online guide](#)

Gather your starting materials

- [] A skill you can deliver reliably, including the parts you must personally review or cannot responsibly offer.
- [] A specific customer group you can reach through appropriate relationships, communities, or an existing audience.
- [] Observed problems, voluntary conversation notes, or public sources that you can separate from your assumptions.
- [] A written time limit, cash limit, review date, and simple record of activity, responses, delivery effort, and costs.

Choose tools for the job

Research and organize - Your AI assistant and original sources

Organize evidence and unanswered questions. Check original sources before treating a claim as a fact.

Make the sample - Tools suited to the deliverable

A document may be enough for a proposal pilot. Choose tools that help produce and review the promised work.

Record the experiment - A spreadsheet or simple log

Keep counts, dates, hours, costs, and outcomes together so you can explain the eventual decision.

YOUR PROJECT

A clear brief comes first

Write enough to guide the first useful version. You can revise this brief as you learn, while keeping the original question visible.

AUDIENCE

PROBLEM

DESIRED OUTPUT

TIME AND CASH LIMITS

SOURCES

WHAT EXISTS ALREADY

DEFINITION OF DONE

STEP 01 / DO THE WORK

Find a reachable buyer

Owner: You + research assistant

Name a buyer, a recurring task, and a realistic access route. Your skills and evidence about their current work give the experiment a practical starting point.

What to do

- 01 List tasks you can complete to a useful standard. Pair each with a specific customer and the situation that makes the task important; include your delivery limitations.
- 02 Collect observations about current behavior: what triggers the task, how it is handled, where effort accumulates, and what happens when it goes badly. Preserve the source and context.
- 03 Separate facts, interpretations, and unknowns. Ask AI to organize the notes and suggest research questions, then choose the buyer you can actually learn from.

Narrow the buyer before designing the offer

“Anyone who needs sales help” is too broad for this sample. A more useful starting group is independent consultants who prepare proposals from discovery-call notes and existing service descriptions.

The research questions are concrete: how often do proposals arise, which parts take work, what information must remain private, and who approves the final document? Repeated proposal writing may be observable; willingness to pay for outside preparation remains a separate question.

KEEP THIS OUTPUT

A buyer shortlist with sources, access routes, and questions worth investigating.

MY NOTES AND PROJECT-SPECIFIC DECISIONS

STEP 01 / SEE IT, ADAPT IT, CHECK IT

Your prompt and review

TEST AN INCOME IDEA / STEP 01

Keep evidence and assumptions apart

1 Observed task

Consultants prepare proposals from notes

2 Assumption

They may want help with a first draft

3 Next question

Which part would they pay to improve?

Illustrative example · The Wealth Experiment · Ashley Kays

Use this illustrative example to recognize the shape of a useful output. Replace its details with your own project.

COPY AND ADAPT THIS PROMPT

Use my skills [skills], access routes [routes], and observations [notes] to compare three possible buyers. For each, list the task, supporting evidence, missing information, and a practical way to learn more. Separate facts from assumptions. Do not invent customer quotes, demand estimates, or market size.

Review before moving on

- [] The buyer describes a recognizable group and situation.
- [] At least one realistic access route is identified.
- [] Unknown demand is still labeled unknown.

If you get stuck: An AI-generated persona can suggest questions, but it cannot establish that real customers have the problem or want your offer.

STEP 02 / DO THE WORK

Choose the risky assumption

Owner: Product assistant + you

Match the test to the uncertainty. A conversation can reveal workflow problems; a defined paid pilot can test a purchase decision. Choose the important question first.

What to do

- 01 List what must be true: the buyer has a relevant problem, you can reach them, the offer is understandable, they will agree to terms, and you can deliver sustainably.
- 02 Choose one assumption and match the test to it. Write what you will show, who will see it, and what observable action would change your confidence.
- 03 Set cash and total-hour limits, a review date, and continue/change/pause criteria in advance. Include preparation and follow-up time so the limit reflects the whole experiment.

An experiment card with a clear question

Sample question: will a relevant consultant with an upcoming proposal consider a clearly scoped preparation pilot after inspecting a sample? The test is a direct conversation and a specific offer, not an app build.

Illustrative boundaries are 14 calendar days, 10 total hours, and a \$50 cash cap; choose limits that fit your circumstances. A meaningful commitment is agreement to a defined pilot and its terms. Praise, curiosity, and an accepted paid engagement belong in separate evidence categories.

KEEP THIS OUTPUT

One experiment card with a question, test, limits, evidence rule, and review date.

MY NOTES AND PROJECT-SPECIFIC DECISIONS

STEP 02 / SEE IT, ADAPT IT, CHECK IT

Your prompt and review

TEST AN INCOME IDEA / STEP 02

Give the test clear boundaries

1 Question

Will a consultant agree to a scoped pilot?

2 Test

Show a sample and discuss specific terms

3 Record

Response, commitment, effort, and uncertainty

Illustrative example · The Wealth Experiment · Ashley Kays

Use this illustrative example to recognize the shape of a useful output. Replace its details with your own project.

COPY AND ADAPT THIS PROMPT

Identify the riskiest assumption in this idea [idea]. Design one small test using my buyer access [access] and limits [limits]. Specify the artifact, audience, primary observation, denominator, review date, and continue/change/pause rules. Explain what the test cannot establish and which alternative explanations to consider.

Review before moving on

- [] The proposed test addresses the chosen uncertainty.
- [] The evidence rule describes an observable action.
- [] Limits include selling, delivery, and review effort.

If you get stuck: Do not change the success rule after seeing the result. Record a revised hypothesis as the next experiment instead.

STEP 03 / DO THE WORK

Make a small sample

Owner: Delivery assistant + you

A representative sample helps someone evaluate the offer. Rehearsing it also reveals missing inputs and delivery problems before you make a customer commitment.

What to do

- 01 Build one representative deliverable using fictional or authorized inputs. Include enough detail to demonstrate your judgment and quality without pretending it was completed for a real client.
- 02 Describe the offer's boundaries: required inputs, exact output, turnaround to agree, revisions, exclusions, and acceptance criteria. Identify any work that requires specialist knowledge you do not provide.
- 03 Run the delivery process yourself and record the effort, including review and correction. Improve the sample until you can explain how you would produce comparable work again.

A proposal draft with useful boundaries

The sample includes a project summary, proposed scope, deliverables, assumptions, and questions for the consultant. It uses fictional source notes and marks information that the consultant must confirm.

The offer covers organizing approved material into a first draft and one agreed review round. The consultant owns commercial terms, factual approval, and the final send. Legal advice, invented credentials, and guaranteed sales outcomes are outside the service. Any sample price is a hypothesis until terms are agreed.

KEEP THIS OUTPUT

A clearly labeled sample, a bounded offer, and a rehearsed delivery checklist.

MY NOTES AND PROJECT-SPECIFIC DECISIONS

STEP 03 / SEE IT, ADAPT IT, CHECK IT

Your prompt and review

TEST AN INCOME IDEA / STEP 03

Make the offer easy to inspect

1 Inputs

Approved notes and service information

2 Deliverable

A proposal first draft for client review

3 Boundary

Client approves terms and sends the proposal

Illustrative example · The Wealth Experiment · Ashley Kays

Use this illustrative example to recognize the shape of a useful output. Replace its details with your own project.

COPY AND ADAPT THIS PROMPT

Create a sample deliverable from these fictional inputs [inputs]. Preserve the stated facts and mark missing information. Then draft an offer with client inputs, deliverables, exclusions, review steps, and acceptance criteria. Identify delivery risks and questions to resolve before I make a customer commitment.

Review before moving on

- [] A buyer can tell exactly what they would receive.
- [] Sample data and unresolved details are clearly marked.
- [] You can perform and review the promised work.

If you get stuck: A beautiful sample does not prove that delivery is repeatable. Rehearse the work from fresh inputs and include corrections in the effort log.

STEP 04 / DO THE WORK

Run one distribution test

Owner: Marketing assistant + you

A test needs relevant people to encounter the offer. Choose one appropriate channel so you can understand who saw it, what they were offered, and how they responded.

What to do

- 01 Choose a channel that fits your buyer access: existing relationships, a relevant community that permits the activity, or a useful demonstration for your audience. Respect the channel's expectations.
- 02 Prepare a clear invitation that identifies the problem, sample, proposed next step, and any pilot terms. Review the exact message and recipient before sending or publishing it.
- 03 Track the date, channel, relevant reach where known, responses, conversations, and commitments. Use aggregate or minimal personal information and preserve the difference between observed counts and estimates.

A draft invitation someone can evaluate

Example wording: "I'm testing a service that turns a consultant's approved notes into a proposal first draft. I have a fictional sample showing the format and review process. If proposal preparation is a current bottleneck, would you be open to a brief conversation about whether a scoped pilot would help?"

Adapt the message to a relevant relationship. A reply requesting the sample is interest; a conversation is a deeper signal; agreed pilot terms are a different event. Record each accurately and respect a decline.

KEEP THIS OUTPUT

Reviewed invitations or a demonstration, plus a dated record of relevant exposure and responses.

MY NOTES AND PROJECT-SPECIFIC DECISIONS

STEP 04 / SEE IT, ADAPT IT, CHECK IT

Your prompt and review

TEST AN INCOME IDEA / STEP 04

Track different kinds of response

1 Attention

A relevant person sees the offer

2 Interest

They ask a question or inspect the sample

3 Commitment

They agree to the defined pilot terms

Illustrative example · The Wealth Experiment · Ashley Kays

Use this illustrative example to recognize the shape of a useful output. Replace its details with your own project.

COPY AND ADAPT THIS PROMPT

Draft a short invitation for this buyer [buyer], channel [channel], offer [offer], and sample [sample]. State the pilot honestly, avoid unsupported claims, and give one clear next step. Then propose a simple tracking table that separates relevant reach, replies, conversations, commitments, and completed work.

Review before moving on

- [] The audience is relevant to the offer.
- [] The message matches the scope you can deliver.
- [] Counts use consistent definitions and denominators.

If you get stuck: Silence has several explanations. Check relevance, delivery, timing, and clarity before concluding the problem does not matter.

STEP 05 / DO THE WORK

Deliver and count the costs

Owner: Delivery assistant + quality reviewer

A purchased pilot is useful evidence only when you understand the work required to fulfill it. Keep a record of delivery quality, customer acceptance, cash movement, and the full effort behind the result.

What to do

- 01 Before starting, confirm scope, inputs, price, timing, review arrangements, and what acceptance means. Use only customer information you are authorized to process in the chosen tools.
- 02 Follow the delivery checklist and review the output against the source material. Record defects, revisions, customer questions, and the final acceptance decision rather than counting an unfinished draft as delivered.
- 03 Log setup, research, selling, production, review, revisions, and support time. Record cash received, direct expenses, refunds, and shared costs consistently; keep pending amounts separate.

Make the effort visible

For the proposal pilot, the ledger includes preparing the fictional sample, discussing fit, clarifying source notes, producing the draft, checking every claim, and handling the agreed review. Failed attempts still belong in the record.

Subtract direct cash costs and refunds from gross collected revenue to describe contribution before other overhead and tax. Do not subtract refunds twice if receipts are already net. Record total human hours separately. Explain any allocation of shared subscriptions or setup effort so later comparisons stay consistent.

KEEP THIS OUTPUT

A reviewed deliverable, an acceptance record, and a complete effort and cash ledger.

MY NOTES AND PROJECT-SPECIFIC DECISIONS

STEP 05 / SEE IT, ADAPT IT, CHECK IT

Your prompt and review

TEST AN INCOME IDEA / STEP 05

Count the whole delivery effort

1 Before delivery

Research, sample, selling, and preparation

2 During delivery

Production, review, and correction

3 After delivery

Acceptance, revisions, support, and costs

Illustrative example · The Wealth Experiment · Ashley Kays

Use this illustrative example to recognize the shape of a useful output. Replace its details with your own project.

COPY AND ADAPT THIS PROMPT

Audit this experiment ledger [ledger]. Separate collected revenue, pending amounts, direct costs, refunds, shared-cost allocations, and all human hours. Show the arithmetic and flag missing categories without treating missing values as zero. Summarize delivery acceptance and unresolved defects separately from financial observations.

Review before moving on

- [] The customer has accepted the agreed work or gaps are recorded.
- [] Preparation, selling, revisions, and failed attempts are included.
- [] Revenue, contribution, and total profit are not confused.

If you get stuck: Counting only generation time hides much of the work. Include the conversations and judgment needed to produce something the customer accepts.

STEP 06 / DO THE WORK

Continue, change or stop

Owner: Analysis assistant + you

Compare the evidence with your original rule, explain what remains unknown, and choose the next move. A useful experiment changes a decision.

What to do

- 01 Review the original question, limits, and evidence rule alongside the dated log. Separate work completed, customer behavior, delivery quality, and economics so activity does not stand in for results.
- 02 Consider alternative explanations. A weak channel, unclear offer, delayed buying need, or difficult delivery process may require a different next test; document which interpretation the evidence supports.
- 03 Write a short decision memo: continue, change, or pause; why; what remains uncertain; and the next test or stopping point. Set new limits before beginning another round.

Three possible decisions, each grounded in evidence

Continue if the observed commitments and accepted delivery justify another bounded test. Change if relevant conversations reveal that organizing discovery notes matters more than drafting a proposal. Pause if you reach your limits without enough useful access or cannot deliver to the required standard.

These are possible interpretations, not reported outcomes. A small pilot informs the next decision; repeatable demand and dependable income require further evidence.

KEEP THIS OUTPUT

A dated decision memo with the supporting evidence, unresolved questions, and next action.

MY NOTES AND PROJECT-SPECIFIC DECISIONS

STEP 06 / SEE IT, ADAPT IT, CHECK IT

Your prompt and review

TEST AN INCOME IDEA / STEP 06

Let the evidence choose the next move

1 Continue

Repeat a promising test within fresh limits

2 Change

Adjust the offer or access route

3 Pause

Stop at the limit and preserve the learning

Illustrative example · The Wealth Experiment · Ashley Kays

Use this illustrative example to recognize the shape of a useful output. Replace its details with your own project.

COPY AND ADAPT THIS PROMPT

Use this original experiment card [card] and evidence log [log] to draft a decision memo. Distinguish observations, interpretations, and unknowns. Assess the preselected criteria, explain alternative causes, and recommend one bounded next test or a pause. Do not infer repeatable revenue from a small sample.

Review before moving on

- [] The decision refers to the original test question.
- [] Alternative explanations and missing evidence are visible.
- [] The next action has a clear limit and review point.

If you get stuck: Do not keep adding features to avoid a difficult decision. Resolve the uncertainty that the current evidence actually exposes.

PUT THE PIECES TOGETHER

Prepare your first experiment for real feedback

Choose a service you could deliver with existing skills. Complete the experiment card before building the sample, then review the offer and outreach plan so your first conversation has a clear purpose.

What you will make

- [] One experiment card with a question, limits, and review date.
- [] One clearly labeled sample and a scoped offer.
- [] One appropriate channel and a reviewed invitation.
- [] One ledger for effort, costs, responses, and the final decision.

How to review it

- [] A relevant person can explain the proposed deliverable.
- [] Your next test addresses a specific uncertainty.
- [] You can record an honest outcome, including a decision to pause.

MY FIRST USEFUL VERSION

NEXT ACTION AND REVIEW DATE

WHEN THE WORK GETS STUCK

Diagnose one problem at a time

People praise the idea but do not commit.

Make the deliverable and next decision concrete. Ask about timing, current alternatives, and what they would need to evaluate a pilot; keep compliments separate from purchase evidence.

The test reaches few relevant people.

Revisit your access route and audience fit. Record the distribution limitation before making conclusions about demand, and choose a realistic channel for the next test.

Delivery takes much longer than expected.

Find the work creating the overrun. Clarify inputs, narrow scope, improve the review process, or change the terms before accepting another engagement.

AI research produces confident but unsupported claims.

Ask for the original sources and inspect them. Remove claims that cannot be established, and convert the remaining uncertainty into a customer question or test.

THE OBSTACLE I AM SEEING

ONE CHANGE I WILL TRY AND HOW I WILL CHECK IT

COMMON QUESTIONS

Decisions you can make with confidence

Do I need a website before testing an offer?

Often a clear document and representative sample are enough for an initial conversation. Build a page when it helps a relevant person understand or act on the offer.

Should my first pilot be free?

Choose based on the question. A free test can reveal usability or delivery issues, but it does not test willingness to pay. Explain the arrangement and avoid treating free participation as purchase evidence.

What if the first experiment does not work?

Record what happened, what it cost, and what you learned. Decide whether the evidence supports a different test or a pause. A bounded attempt can be useful without becoming an ongoing business.

Go deeper with the original sources

[Anthropic: choosing simple workflows and evaluating their results](https://www.anthropic.com/research/building-effective-agents)

<https://www.anthropic.com/research/building-effective-agents>

[U.S. Small Business Administration: customer research and business planning](https://www.sba.gov/counseling/plan-your-business/)

<https://www.sba.gov/counseling/plan-your-business/>

Tool interfaces and features can change. Recheck current official instructions when you apply the method.

FINAL REVIEW

Keep an honest result record

A finished artifact, demand, learner performance, and business results are different forms of evidence. Record what you know and what you still need to learn.

WHAT EXISTS

WHAT I CHECKED

EVIDENCE AND SOURCE

TOTAL HOURS (INCLUDING SETUP AND REVIEW)

CASH SPENT

WHAT REMAINS UNKNOWN

NEXT DECISION

ASK ASHLEY

Bring your project. Let's work through the next step.

Share your project, current URL and main question. Scope, availability and pricing are agreed before work is booked.

MAKE YOUR FIRST MESSAGE USEFUL

What are you trying to create or improve?

Who is it for, and what have you already made?

Which part is blocking you, and what kind of help would be useful?

[Email Ashley: info@waymaker.cx](mailto:info@waymaker.cx)

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WHAT I WANT TO ASK OR WORK ON

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