

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Design an ABM Dashboard for Decisions and Follow-Through

QUESTION

What should an ABM dashboard show so account teams can decide what to do next without confusing activity with progress?

GUIDE TAKEAWAY

A dashboard fails when every metric is equally prominent and none names a decision. Activity, buying-group coverage, opportunity progression, and commercial outcomes operate on different time scales.

START HERE

Name the review decisions.

YOUR SITUATION

Account or cohort

Decision to make

Starting state and exclusions

Evidence sources, dates, and limitations

Unknowns to validate

WORK THROUGH THE GUIDE

1. Name the review decisions

Evidence or input

Output or decision

Owner and review point

2. Build an account action table

Evidence or input

Output or decision**Owner and review point**

3. Expose filters and freshness

Evidence or input**Output or decision****Owner and review point**

4. Link to supporting records

Evidence or input**Output or decision****Owner and review point**

5. Test known account examples

Evidence or input**Output or decision****Owner and review point****COMPARE THE OPTIONS**

Executive outcome view

Useful when: Program allocation decisions

Limitation: Lags current account work

Suggested action: Show mature cohorts

Why this fits our situation**Evidence needed before acting**

Account action table

Useful when: Weekly seller coordination

Limitation: Needs maintained ownership

Suggested action: Assign actions and dates

Why this fits our situation

Evidence needed before acting

Diagnostic cohort view

Useful when: Explaining uneven performance

Limitation: Can fragment small samples

Suggested action: Keep counts and definitions

Why this fits our situation**Evidence needed before acting****COMMIT TO A BOUNDED NEXT STEP****Chosen action****Responsible owner****Required approval****Success measure and definition****Review date****Continue, revise, or stop criteria**

Guide: <https://outselll.com/blogs/abm-dashboard-design/>

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