

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Account-data provenance: trace a recommendation back to its source

QUESTION

What records make an agent's account recommendation auditable?

GUIDE TAKEAWAY

Record the original entity, the transformation and the responsible owner. A final summary alone cannot explain how a source became a commercial recommendation.

START HERE

Identify the material assertion.

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. Identify the material assertion

Evidence or input

Output or decision

Owner and review point

2. Preserve source and entity

Evidence or input

Output or decision

Owner and review point

3. Record the transformation version

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

4. Attach acceptance and ownership

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

5. Trace corrections to affected outputs

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

Source entity

Useful when: Original evidence

Limitation: May be stale or restricted

Suggested action: Keep dates and permissions

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

Transformation

Useful when: Extraction or matching

Limitation: Can introduce an error

Suggested action: Record version and inputs

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

Assertion

Useful when: A statement used for action

Limitation: Trace does not imply truth

Suggested action: Review claim support

Why this fits our situation

Evidence needed before acting

Correction event

Useful when: Repairing an accepted record

Limitation: Other outputs may be affected

Suggested action: Inspect dependent decisions

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/account-data-provenance/>

Publisher and evidence policy: <https://outselll.com/editorial-policy/>