

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Writing account research briefs that support one decision

QUESTION

What does a seller need to know before choosing an account action?

GUIDE TAKEAWAY

A long company summary can still leave a seller uncertain about whom to contact, what to ask, and which claims require verification. Diagnose brief usefulness by checking whether a reviewer can identify the proposed action and the evidence behind it in one pass.

START HERE

Name the decision.

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 decision

Evidence or input

Output or decision

Owner and review point

2. Gather original evidence

Evidence or input

Output or decision**Owner and review point**

3. Separate fact and inference

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

4. Propose next question

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

5. Refresh after discovery

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

Meeting brief

Useful when: Preparing a specific conversation

Limitation: Can become too broad

Suggested action: Choose three verification questions

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

Qualification brief

Useful when: Deciding effort level

Limitation: May inherit selection bias

Suggested action: Document exclusions and unknowns

Why this fits our situation

Evidence needed before acting

Trigger brief

Useful when: Interpreting a recent event

Limitation: Public event may lack commercial scope

Suggested action: Test one operational hypothesis

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

Living account plan

Useful when: Coordinating sustained pursuit

Limitation: Updates can lose evidence history

Suggested action: Version decisions and sources

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://outsell.com/blogs/account-research-briefs/>

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