

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Segmenting accounts around a meaningful operating difference

QUESTION

Which account differences require a different message, motion, or level of effort?

GUIDE TAKEAWAY

Segmentation adds little value when every segment receives the same proposition and workflow. Industry and company size may help organize a database while overlooking the operating condition that changes the offer's relevance.

START HERE

Choose segment 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. Choose segment decision

Evidence or input

Output or decision

Owner and review point

2. Select meaningful dimensions

Evidence or input

Output or decision**Owner and review point**

3. Define movement rules

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

4. Set queue precedence

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

5. Compare outcomes

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

Structural segment

Useful when: Changing the proposition or delivery

Limitation: Attributes may conceal internal variation

Suggested action: Validate operating model

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

Dynamic behavior segment

Useful when: Routing current account interest

Limitation: Membership changes quickly

Suggested action: Set precedence and expiry

Why this fits our situation

Evidence needed before acting

Fixed campaign cohort

Useful when: Reviewing a completed initiative

Limitation: Does not reflect current readiness

Suggested action: Preserve cohort and date

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

Lifecycle segment

Useful when: Coordinating prospect and customer work

Limitation: Stage labels can be inconsistent

Suggested action: Define entry and exit evidence

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-segmentation-enterprise-abm/>

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