

## OUTSELL PLAYBOOK

# OUTSELL JOURNAL — DECISION WORKSHEET

9 Ways Agentic ABM Connects Account Work to Sales Opportunities

## QUESTION

Which practical connections help sales and marketing turn agent-assisted account work into an accountable opportunity process?

## GUIDE TAKEAWAY

Define the account, commercial objective, starting opportunity state, owner, and proposed next decision before generating content. Siloed teams often disagree because they work from different account lists or objectives.

## START HERE

Agree the account objective.

## 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. Agree the account objective

Evidence or input

Output or decision

Owner and review point

2. Map verified buying roles

Evidence or input

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

3. Package evidence and messages

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

4. Record sales dispositions

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

5. Review opportunity follow-through

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

Manual account-owner coordination

Useful when: A small account set needs nuanced commercial judgment

Limitation: Preparation and updates depend on available owner time

Suggested action: Standardize one shared decision packet

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

Rule-based CRM coordination

Useful when: Eligibility and handoff steps are predictable

Limitation: Novel research and ambiguity remain outside fixed rules

Suggested action: Define exception ownership and dispositions

**Why this fits our situation**

**Evidence needed before acting**

Bounded agent-assisted coordination

Useful when: Research and message preparation vary across accounts

Limitation: Output quality and execution need independent controls

Suggested action: Evaluate accepted plays and correction effort

**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/agent-ic-abm-sales-marketing-alignment/>

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