

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Agentic workflows versus marketing automation

QUESTION

When does a task need an agent instead of fixed automation?

GUIDE TAKEAWAY

Automate stable rules. Add bounded agents for varied evidence and interpretation. Use accountable specialist judgment for unresolved or consequential decisions.

START HERE

Define the acceptance contract.

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. Define the acceptance contract

Evidence or input

Output or decision

Owner and review point

2. Automate stable rules

Evidence or input

Output or decision

Owner and review point

3. Bound agent interpretation

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

4. Handle unresolved states

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

5. Measure accepted work and rework

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

Fixed automation

Useful when: Known routing rules

Limitation: Cannot resolve ambiguity

Suggested action: Fix identifiers and permissions

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

Bounded agent

Useful when: Variable interpretation

Limitation: Unsupported plausible output

Suggested action: Test source support

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

Specialist review

Useful when: Consequential decisions

Limitation: Requires review capacity

Suggested action: Specify the approval decision

Why this fits our situation

Evidence needed before acting

Hybrid workflow

Useful when: Coordinating the methods

Limitation: More integrations to maintain

Suggested action: Observe complete delivery

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/agentive-workflow-versus-marketing-automation/>

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