

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Evaluate AI Account Research at the Claim Level

QUESTION

How can an ABM team tell whether an AI account brief is usable before sales acts on it?

GUIDE TAKEAWAY

Polished prose can conceal a weak account match, stale information, or an inference presented as a fact. A brief can contain many correct details and still fail if its central buying hypothesis rests on the wrong subsidiary.

START HERE

Identify material claims.

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 material claims

Evidence or input

Output or decision

Owner and review point

2. Check account identity

Evidence or input

Output or decision

Owner and review point

3. Inspect cited passages

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

4. Label unknowns explicitly

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

5. Calibrate quality scoring

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

Claim audit

Useful when: Buying hypothesis needs verification

Limitation: Requires specialist review

Suggested action: Inspect decision-bearing claims

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

Brief-level rubric

Useful when: Comparing repeated tasks

Limitation: Can hide one severe error

Suggested action: Add hard-failure rules

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

Automated grader

Useful when: Larger evaluation volumes

Limitation: May disagree with experts

Suggested action: Calibrate against labels

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/ai-account-research-quality/>

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