OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

AI marketing context at handoffs: a decision-ledger operating model

QUESTION

How can B2B marketing teams preserve strategy, evidence and buyer context when AI accelerates work across research, content, media and sales?

GUIDE TAKEAWAY

Move a versioned context packet with the work: objective, account and audience scope, approved claims, evidence limits, decision owners, change history and activation status.

START HERE

Define one buyer decision and cohort.

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 one buyer decision and cohort

Evidence or input

Output or decision

Owner and review point

2. Register facts, hypotheses, constraints and owners

Evidence or input

Output or decision

Owner and review point

3. Attach a versioned context packet to each handoff

Evidence or input

Output or decision

Owner and review point

4. Gate consequential activation and sales actions

Evidence or input

Output or decision

Owner and review point

5. Measure corrections, recovery and buyer outcomes separately

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Static campaign brief

Useful when: One team executes a short, stable campaign

Limitation: Changes and reasoning become detached

Suggested action: Add version, owners and expiry

Why this fits our situation

Evidence needed before acting

Shared context ledger

Useful when: Several teams need the same decision basis

Limitation: Requires disciplined updates

Suggested action: Link claims, decisions and dependent assets

Why this fits our situation

Evidence needed before acting

Tool-specific workflow state

Useful when: Execution stays inside one platform

Limitation: Context may disappear across systems

Suggested action: Export a human-readable handoff contract

Why this fits our situation

Evidence needed before acting

Autonomous cross-channel execution

Useful when: Actions adapt at high speed

Limitation: Errors and stale assumptions propagate quickly

Suggested action: Use bounded authority, approval and rollback

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/ai-marketing-context-handoff-ledger/

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