

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Audit the Data Relationships Behind Attribution

QUESTION

Which data checks should come before an ABM team trusts a pipeline attribution report?

GUIDE TAKEAWAY

Attribution depends on a chain of relationships: event to participant, participant to account, account to opportunity, and opportunity to the measured outcome. A clean chart cannot repair a broken link.

START HERE

Fix the eligible CRM base.

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. Fix the eligible CRM base

Evidence or input

Output or decision

Owner and review point

2. Test identity relationships

Evidence or input

Output or decision

Owner and review point

3. Reconcile included amounts

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

4. Inspect excluded records

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

5. Own the exception queue

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

Completeness audit

Useful when: Finding absent required fields

Limitation: Cannot prove correct associations

Suggested action: Inspect linked records

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

Relationship audit

Useful when: Validating event-to-deal paths

Limitation: Requires record-level review

Suggested action: Sample included and excluded deals

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

Tagging validation

Useful when: Preventing campaign fragmentation

Limitation: Misses offline activity

Suggested action: Test redirects and naming

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/attribution-data-quality/>

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