OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

B2B quote-to-order AI: a readiness plan after Ericsson's SAP Commerce case

QUESTION

What should a B2B team fix before adding AI agents to quoting and order workflows?

GUIDE TAKEAWAY

Automate only after the team can explain the current quote, its authoritative data, approval rights and failure recovery. Speed is useful when the resulting quote is valid, reviewable and easy for the buyer to act on.

START HERE

Map one current quote-to-order path.

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. Map one current quote-to-order path

Evidence or input

Output or decision

Owner and review point

2. Name authoritative data and permissions

Evidence or input

Output or decision

Owner and review point

3. Define exception and approval routes

Evidence or input

Output or decision

Owner and review point

4. Test a bounded draft-only workflow

Evidence or input

Output or decision

Owner and review point

5. Compare validity, recovery and accepted outcomes

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Deterministic workflow

Useful when: Rules, data and transitions are stable

Limitation: Cannot resolve ambiguous commercial judgment

Suggested action: Automate validation and routing first

Why this fits our situation

Evidence needed before acting

Agent-assisted preparation

Useful when: Evidence must be gathered across approved systems

Limitation: Can assemble an incorrect or incomplete draft

Suggested action: Require citations and human approval

Why this fits our situation

Evidence needed before acting

Buyer self-service quoting

Useful when: Standard products and entitlements are clear

Limitation: Complex exceptions can frustrate buyers

Suggested action: Show status, assumptions and a human route

Why this fits our situation

Evidence needed before acting

Autonomous consequential action

Useful when: Authority and recovery are demonstrably controlled

Limitation: Errors can affect price, contract or order state

Suggested action: Expand only after adversarial and rollback tests

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/b2b-quote-to-order-ai-readiness/

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