

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Build CFO messaging around a decision-ready investment case

QUESTION

What should ABM content give a CFO before asking for investment approval?

GUIDE TAKEAWAY

Financial messaging often collapses into a large ROI percentage with no explanation of how benefits will be realised. A CFO cannot evaluate that number without a baseline, costs, timing and an accountable owner.

START HERE

Confirm investment intent.

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. Confirm investment intent

Evidence or input

Output or decision

Owner and review point

2. List full delivery costs

Evidence or input

Output or decision

Owner and review point

3. Validate model inputs

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

4. Show downside assumptions

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

5. Agree review checkpoints

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

Editable cost model

Useful when: Inputs can be validated

Limitation: Defaults can mislead

Suggested action: Confirm each assumption

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

Investment memo

Useful when: Committee needs a concise case

Limitation: Simplifies operational detail

Suggested action: Attach the working model

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

Measured pilot

Useful when: Benefits are uncertain

Limitation: Adds time and expense

Suggested action: Agree evaluation criteria

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/cfo-messaging/>

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