OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

Copilot Workspaces: a buying-group action ledger for shared AI work

QUESTION

How should B2B account teams use a shared AI workspace without turning mixed files, conversations and suggestions into unverified buyer truth?

GUIDE TAKEAWAY

A shared workspace becomes commercially useful when every material claim has an owner, every unresolved question stays visible and every consequential action records the human decision behind it.

START HERE

Define one account decision and named roles.

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 account decision and named roles

Evidence or input

Output or decision

Owner and review point

2. Review linked sources and access

Evidence or input

Output or decision

Owner and review point

3. Classify claims and unresolved questions

Evidence or input

Output or decision

Owner and review point

4. Record human approval for each action

Evidence or input

Output or decision

Owner and review point

5. Measure corrections, decisions and stop rules

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Shared document folder

Useful when: Team needs common files

Limitation: Files do not expose claim status

Suggested action: Add an action ledger

Why this fits our situation

Evidence needed before acting

Copilot Workspace pilot

Useful when: Evidence spans reviewed sources

Limitation: Rollout and access can vary

Suggested action: Test one bounded workstream

Why this fits our situation

Evidence needed before acting

Workspace plus proposed action

Useful when: Team needs a coordinated next step

Limitation: Suggestion can look like approval

Suggested action: Name the human decider

Why this fits our situation

Evidence needed before acting

Automated account action

Useful when: Rules and authority are proven

Limitation: Can amplify stale or restricted context

Suggested action: Require a separate control review

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/copilot-workspaces-buying-group-action-ledger/

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