OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

Copilotforce: a sales-context boundary pilot for Microsoft and Salesforce teams

QUESTION

How should revenue teams test Salesforce in Microsoft Copilot without confusing connected context, permissioned action and verified customer truth?

GUIDE TAKEAWAY

Connected context is useful only when the team knows which system owns each fact, which user may see it, which action requires confirmation and how a seller corrects unsupported output.

START HERE

Choose one account decision and pilot 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. Choose one account decision and pilot cohort

Evidence or input

Output or decision

Owner and review point

2. Map source authority, identity, freshness and correction

Evidence or input

Output or decision

Owner and review point

3. Separate retrieval from proposed and confirmed writeback

Evidence or input

Output or decision

Owner and review point

4. Test permissions, conflicts, refusals and validation rules

Evidence or input

Output or decision

Owner and review point

5. Review decision quality and stop thresholds

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Manual CRM and inbox review

Useful when: Small cohort and high-consequence deal

Limitation: Slow and dependent on seller discipline

Suggested action: Use as the pilot baseline

Why this fits our situation

Evidence needed before acting

Read-only connected brief

Useful when: Context is scattered across approved sources

Limitation: Can still merge stale or conflicting facts

Suggested action: Require citations and correction

Why this fits our situation

Evidence needed before acting

Proposed CRM writeback

Useful when: Repetitive updates have clear rules

Limitation: Suggestion can bypass normal process

Suggested action: Show before and after for approval

Why this fits our situation

Evidence needed before acting

Confirmed agent action

Useful when: Low-risk action has tested validation

Limitation: Authority may expand unnoticed

Suggested action: Limit fields, users 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/copilotforce-sales-context-boundary-pilot/

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