OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

Cross-platform agentic CX: a connector governance plan for B2B marketing

QUESTION

How should enterprise marketing teams assess an agentic CX connector before it can read data or take action across AI platforms?

GUIDE TAKEAWAY

Treat each connector as a governed action path, not as a convenient chat feature. Approve the specific data, tools and consequences required for one workflow, then test revocation, recovery and evidence before expanding access.

START HERE

Define one decision and action 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. Define one decision and action path

Evidence or input

Output or decision

Owner and review point

2. Register data, tools and connector ownership

Evidence or input

Output or decision

Owner and review point

3. Constrain permissions and approval gates

Evidence or input

Output or decision

Owner and review point

4. Test failure, injection and revocation

Evidence or input

Output or decision

Owner and review point

5. Review control quality before expansion

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Read-only evidence retrieval

Useful when: The team needs facts from approved systems

Limitation: Retrieved content can still be stale or hostile

Suggested action: Validate source, identity and data class

Why this fits our situation

Evidence needed before acting

Draft and recommendation

Useful when: A human owns the business decision

Limitation: A plausible draft may hide missing evidence

Suggested action: Show sources, uncertainty and reviewer

Why this fits our situation

Evidence needed before acting

Bounded write action

Useful when: The target and state change are deterministic

Limitation: Retries or wrong identity can create damage

Suggested action: Add validation, idempotency and approval

Why this fits our situation

Evidence needed before acting

Broad cross-platform orchestration

Useful when: Multiple proven paths share governed context

Limitation: Authority and failure can compound across tools

Suggested action: Expand only from tested, revocable modules

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/cross-platform-agentic-cx-connector-governance/

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