OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

Decision models for B2B routing: an evaluation plan beyond latency

QUESTION

When should a B2B team use rules, a decision model, a general LLM or human triage to route work?

GUIDE TAKEAWAY

Choose a routing method by decision shape, error cost and evidence-not by model speed alone. Define labels, abstention, review, drift and recovery before automating consequential handoffs.

START HERE

Define one bounded routing decision.

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 bounded routing decision

Evidence or input

Output or decision

Owner and review point

2. Create labels, evidence and error costs

Evidence or input

Output or decision

Owner and review point

3. Choose rules, model and human boundaries

Evidence or input

Output or decision

Owner and review point

4. Evaluate representative cases and abstention

Evidence or input

Output or decision

Owner and review point

5. Pilot in shadow mode and monitor drift

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Deterministic rules

Useful when: Inputs and policy are explicit and stable

Limitation: Brittle with semantic variation or many exceptions

Suggested action: Version rules and route unmatched cases

Why this fits our situation

Evidence needed before acting

Specialist decision model

Useful when: A bounded label set has representative examples

Limitation: Taxonomy drift can create confident misroutes

Suggested action: Calibrate, abstain and test per class

Why this fits our situation

Evidence needed before acting

General-purpose LLM

Useful when: The task needs synthesis or multi-step explanation

Limitation: Higher latency and broader failure surface

Suggested action: Constrain outputs and verify consequential actions

Why this fits our situation

Evidence needed before acting

Human triage

Useful when: Evidence is incomplete or consequence is high

Limitation: Queues can be slow and inconsistent

Suggested action: Give reviewers clear evidence and correction codes

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/decision-model-governance-b2b-routing/

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