

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Building first-party account intelligence from ordinary interactions

QUESTION

How can owned interactions support an account view without overstating what they reveal?

GUIDE TAKEAWAY

First-party account intelligence often fails through fragmentation rather than a lack of data. Website activity, meeting notes, support requests, trial behavior, and opportunity records exist but use incompatible account identities or timestamps.

START HERE

Define useful events.

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 useful events

Evidence or input

Output or decision

Owner and review point

2. Resolve account identity

Evidence or input

Output or decision**Owner and review point**

3. Build dated timeline

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

4. Add human interpretation

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

5. Audit decision value

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

CRM activity timeline

Useful when: Reviewing known relationships

Limitation: Logging varies between teams

Suggested action: Add outcome and context

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

Product event summary

Useful when: Testing evaluation or adoption

Limitation: Usage is not budget authority

Suggested action: Link events to an agreed objective

Why this fits our situation

Evidence needed before acting

Website account activity

Useful when: Finding research themes

Limitation: Identity may be inferred

Suggested action: Retain confidence and source

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

Combined account brief

Useful when: Preparing a shared review

Limitation: Bad joins amplify errors

Suggested action: Audit evidence behind conclusions

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/first-party-account-intelligence/>

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