OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

HubSpot Fall 2026: prepare your CRM before scaling AI campaigns

QUESTION

What should a B2B team check before applying HubSpot's latest AI capabilities to ABM?

GUIDE TAKEAWAY

Better campaign context starts with a usable account record: consistent company identity, current buying-role information, dated evidence and an owner who can correct it.

START HERE

Choose a small account 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 a small account cohort

Evidence or input

Output or decision

Owner and review point

2. Resolve company relationships

Evidence or input

Output or decision

Owner and review point

3. Review roles and dated evidence

Evidence or input

Output or decision

Owner and review point

4. Approve a message and handoff

Evidence or input

Output or decision

Owner and review point

5. Compare quality and correction effort

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Unreviewed CRM export

Useful when: The team needs an initial inventory

Limitation: May contain duplicates and stale roles

Suggested action: Assign account identity owners

Why this fits our situation

Evidence needed before acting

Reviewed account brief

Useful when: A specific buyer decision is known

Limitation: Needs dated supporting evidence

Suggested action: Record unknowns explicitly

Why this fits our situation

Evidence needed before acting

Bounded AI draft

Useful when: The brief and permissions are approved

Limitation: Still needs factual review

Suggested action: Check claims before activation

Why this fits our situation

Evidence needed before acting

Campaign expansion

Useful when: The pilot produces usable handoffs

Limitation: Needs ongoing data maintenance

Suggested action: Review quality before adding volume

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/hubspot-fall-2026-crm-context-abm/

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