OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

The hybrid AI buyer: a discovery-to-handoff model for B2B marketing

QUESTION

How should B2B technology and services teams prepare for buyers who research through AI but still need people, proof and operational detail to complete a purchase?

GUIDE TAKEAWAY

Treat AI-mediated discovery and human-led evaluation as one traceable journey. Publish useful evidence for machines and people, then preserve the question, source, account context and decision owner when the buyer reaches sales.

START HERE

Select one account cohort and buying 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. Select one account cohort and buying decision

Evidence or input

Output or decision

Owner and review point

2. Map role-specific questions across discovery and approval

Evidence or input

Output or decision

Owner and review point

3. Create a dated claim and evidence inventory

Evidence or input

Output or decision

Owner and review point

4. Define a permissioned AI-to-human handoff

Evidence or input

Output or decision

Owner and review point

5. Review continuity, corrections and qualified next steps

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Generic funnel content

Useful when: The audience need is broad and early

Limitation: Assumes a visible linear journey

Suggested action: Use only for orientation

Why this fits our situation

Evidence needed before acting

Question-led evidence pages

Useful when: Buyers need verifiable comparison detail

Limitation: Requires owners and dated maintenance

Suggested action: Link each claim to current evidence

Why this fits our situation

Evidence needed before acting

Permissioned sales handoff

Useful when: A buyer explicitly requests help

Limitation: Context can become stale or excessive

Suggested action: Transfer question, source and unknowns

Why this fits our situation

Evidence needed before acting

Authenticated decision room

Useful when: Account-specific terms or proof are needed

Limitation: Access and version control add work

Suggested action: Use for consequential evaluation

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/hybrid-ai-buyer-discovery-handoff-model/

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