

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

RAG for account research: build a brief from verifiable evidence

QUESTION

How should retrieval-augmented generation support an ABM account brief?

GUIDE TAKEAWAY

Retrieve relevant, dated passages before drafting. Preserve the identity and source behind each assertion, and allow the workflow to return an unresolved question.

START HERE

Define the account question.

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 the account question

Evidence or input

Output or decision

Owner and review point

2. Retrieve permissioned passages

Evidence or input

Output or decision

Owner and review point

3. Check identity and dates

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

4. Draft supported claims

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

5. Review unknowns before activation

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

Public documents

Useful when: Company-level facts

Limitation: May be stale or incomplete

Suggested action: Store date and exact passage

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

CRM notes

Useful when: Known relationship context

Limitation: Access may be restricted

Suggested action: Apply record permissions

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

Retrieved brief

Useful when: Repeatable preparation

Limitation: Generation may add unsupported detail

Suggested action: Review material claims

Why this fits our situation

Evidence needed before acting

Unresolved question

Useful when: Evidence is missing

Limitation: Cannot justify a purchase claim

Suggested action: Ask a bounded discovery question

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/retrieval-augmented-account-research/>

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