OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

Slack knowledge for B2B discovery: a governed evidence-to-question workflow

QUESTION

How can B2B teams use internal conversation history to improve discovery without leaking private context or turning anecdotes into facts?

GUIDE TAKEAWAY

Permission to retrieve a conversation is not permission to publish it. Preserve the source and context, separate patterns from facts, remove identities, and require accountable review before internal knowledge becomes buyer-facing material.

START HERE

Define one permitted knowledge task.

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 permitted knowledge task

Evidence or input

Output or decision

Owner and review point

2. Register sources and evidence classes

Evidence or input

Output or decision

Owner and review point

3. Separate patterns from publishable claims

Evidence or input

Output or decision

Owner and review point

4. Redact and approve each reuse context

Evidence or input

Output or decision

Owner and review point

5. Monitor corrections, retention and usefulness

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Raw conversation search

Useful when: A reviewer needs source-level context

Limitation: Messages may be private, incomplete or outdated

Suggested action: Restrict scope and open cited context

Why this fits our situation

Evidence needed before acting

Internal sourced brief

Useful when: A team needs reusable discovery preparation

Limitation: Derived summaries can outlive evidence

Suggested action: Attach provenance, owner and review date

Why this fits our situation

Evidence needed before acting

Account-specific example

Useful when: The example directly helps a permitted conversation

Limitation: Details can identify another customer or project

Suggested action: Use only approved, minimal context

Why this fits our situation

Evidence needed before acting

Public learning content

Useful when: A pattern is sufficiently evidenced and cleared

Limitation: Anonymisation may not prevent re-identification

Suggested action: Require publication review and limitations

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/slack-knowledge-b2b-discovery-governance/

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