OUTSELL PLAYBOOK

OUTSELL JOURNAL - DECISION WORKSHEET

SMB AI partner conversations: build an evidence brief before the pitch

QUESTION

How should B2B technology partners turn a broad AI transformation narrative into a credible, account-specific conversation for an SMB buying group?

GUIDE TAKEAWAY

Use a platform narrative to open the discussion, then replace generic promise with a bounded workflow, named owners, a baseline, risks, evidence and an explicit next decision.

START HERE

Select one account cohort and workflow 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 workflow decision

Evidence or input

Output or decision

Owner and review point

2. Label facts, claims, hypotheses and open questions

Evidence or input

Output or decision

Owner and review point

3. Map buyer roles to one shared evidence brief

Evidence or input

Output or decision

Owner and review point

4. Choose a bounded proof and explicit stop rule

Evidence or input

Output or decision

Owner and review point

5. Hand sales approved claims, owners and next actions

Evidence or input

Output or decision

Owner and review point

COMPARE THE OPTIONS

Vendor narrative

Useful when: Buyer needs orientation

Limitation: Can remain generic

Suggested action: Use it to open discovery

Why this fits our situation

Evidence needed before acting

Workflow evidence brief

Useful when: Account has a defined problem

Limitation: Requires permissioned discovery

Suggested action: Assign claims and unknowns

Why this fits our situation

Evidence needed before acting

Technical assessment

Useful when: Data or architecture is the main uncertainty

Limitation: May omit adoption and commercial context

Suggested action: Add role and outcome views

Why this fits our situation

Evidence needed before acting

Peer community session

Useful when: Buyers need shared learning

Limitation: Does not prove account intent or fit

Suggested action: Publish attributed limits

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/smb-ai-partner-conversation-evidence-brief/

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