

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Define Sourced and Influenced Pipeline Separately

QUESTION

How should an enterprise ABM team define sourced and influenced pipeline without inflating either measure?

GUIDE TAKEAWAY

Teams often use sourced to mean first contact, opportunity origination, or ownership credit, then compare it with influenced as if the measures were mutually exclusive. Those choices produce disputes because neither label supplies a universal rule.

START HERE

Agree the origin trigger.

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. Agree the origin trigger

Evidence or input

Output or decision

Owner and review point

2. Define qualifying influence

Evidence or input

Output or decision**Owner and review point**

3. Preserve opportunity overlap

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

4. Separate value from credit

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

5. Reconcile distinct records

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

Origin flag

Useful when: Understanding opportunity formation

Limitation: Depends on agreed trigger

Suggested action: Document conflict rules

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

Influence flag

Useful when: Tracking relevant participation

Limitation: Overlap prevents simple summing

Suggested action: Report distinct opportunity IDs

Why this fits our situation

Evidence needed before acting

Fractional credit

Useful when: Allocating a defined total

Limitation: Weights reflect model assumptions

Suggested action: Reconcile model allocations

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://outsell.com/blogs/sourced-versus-influenced-pipeline/>

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