

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Uplift versus propensity: find accounts contact can help

QUESTION

What is the difference between predicting conversion and estimating the effect of contact?

GUIDE TAKEAWAY

Propensity predicts an outcome under observed conditions. Uplift asks how an intervention changes that outcome; it needs a credible comparison and cannot be inferred from engagement alone.

START HERE

Choose prediction or causal effect.

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. Choose prediction or causal effect

Evidence or input

Output or decision

Owner and review point

2. Specify treatment and baseline

Evidence or input

Output or decision

Owner and review point

3. Preserve assignment and features

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

4. Inspect overlap and subgroup size

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

5. Validate before allocating effort

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

Propensity

Useful when: Forecasting likely outcomes

Limitation: Does not estimate contact effect

Suggested action: Label the predicted event

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

Average treatment effect

Useful when: Evaluating the added play

Limitation: May hide useful variation

Suggested action: Start with a credible comparison

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

Conditional effect

Useful when: Targeting an intervention

Limitation: Needs more data and assumptions

Suggested action: Validate in fresh accounts

Why this fits our situation

Evidence needed before acting

Engagement correlation

Useful when: Describing observed activity

Limitation: Selection can explain it

Suggested action: Avoid causal wording

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/uplift-versus-propensity-in-abm/>

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