

OUTSELL PLAYBOOK

OUTSELL AI — SAMPLE ACCOUNT PLAY

Fictional account. Illustrative deliverables. No customer results claimed.

Northstar Components

Fictional manufacturing group evaluating how to connect finance and operational systems after an acquisition.

ACCOUNT BRIEF

Observation: Sample evidence: an acquisition announcement, an approved CRM account record, and integration-related website engagement.

Hypothesis: Integration may be a relevant conversation. The acquisition and engagement do not prove a funded project, a buying timeline, or a specific stakeholder's intent.

Unknowns: Budget, current systems, decision ownership, implementation timing, and whether consolidation is a priority.

ROLE MESSAGES

CFO

Question: How would we compare consolidation cost with the cost of leaving systems separate?

Sample message: If systems consolidation is on your agenda, would a worksheet comparing migration cost, reporting effort, and disruption help your finance team assess the options?

Useful asset: Cost-assumptions worksheet

Review gate: Finance owner validates assumptions; no savings claim is published without supporting evidence.

CTO

Question: Which systems and interfaces would need to change, and what could interrupt operations?

Sample message: If integration is being assessed, we can structure a discovery brief around the current interfaces, migration dependencies, and testing requirements. Which dependency would your team investigate first?

Useful asset: Integration discovery brief

Review gate: Technical owner checks product capabilities, dependencies, and security statements.

COO

Question: What would change for the teams and processes that have to keep operating?

Sample message: A process map can help compare where today's systems add work and where a migration could disrupt delivery. Which operating process should the team map first?

Useful asset: Process and adoption map

Review gate: Operational claims stay provisional until the account validates the workflow.

CONNECTED WORKFLOW

1. Research: A sourced account brief

Record the observation, source, date, account match, hypothesis, unknowns, and proposed next action.

2. Message: A role-specific message map

Keep one business question. Change the evidence and next step for finance, technology, and operations.

3. Journey: An approved account play

Prepare a relevant account page, a permitted email or account-targeted placement, and sales follow-up. Stop or adapt the sequence when a buyer responds.

4. Handoff: A sales action with context

Send the account owner the known interaction, its limitations, the useful asset, and a suggested discovery question. The owner accepts, defers, or rejects the action.

5. Measure: A decision about the next play

Review accepted handoffs, verified stakeholder coverage, and CRM stage movement. Keep existing opportunities separate from newly sourced pipeline.

YOUR ACCOUNT WORKSHEET

Account and owner

Business problem to explore

Observed fact, source link, and date

Account-match confidence and limitations

Hypothesis to validate

Unknowns

CFO question and supporting evidence

CTO question and supporting evidence

Operational question and supporting evidence

Useful asset and approved claims

Permitted channels and exclusions

Review owners

Starting account and opportunity state

Recommended sales action

Acceptance decision and reason

Measure, definition, and review date

Full example: <https://outselll.com/sample-account-play/>

Evidence policy: <https://outselll.com/editorial-policy/>

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