

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Build Account Engagement Scorecards That Explain Readiness

QUESTION

How can an account engagement scorecard prioritize useful action without equating repeated activity with buying readiness?

GUIDE TAKEAWAY

One contact generating many clicks can make an account appear more ready than several stakeholders taking fewer substantive actions. A cumulative score hides breadth, role, recency, and commercial context.

START HERE

Separate fit and engagement.

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. Separate fit and engagement

Evidence or input

Output or decision

Owner and review point

2. Count roles and people

Evidence or input

Output or decision**Owner and review point**

3. Cap repeated low-value events

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

4. Expose score components

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

5. Review seller dispositions

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

Activity total

Useful when: Finding frequent interaction

Limitation: Rewards repetition and account size

Suggested action: Cap repeated events

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

Component scorecard

Useful when: Explaining account priority

Limitation: More dimensions to maintain

Suggested action: Show breadth and recency

Why this fits our situation

Evidence needed before acting

Seller disposition loop

Useful when: Testing operational usefulness

Limitation: Feedback can be inconsistent

Suggested action: Standardize follow-up reasons

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/account-engagement-scorecards/>

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