

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Matching intelligence to the right CRM account

QUESTION

How can a team attach external evidence without creating duplicates or crossing account boundaries?

GUIDE TAKEAWAY

A signal attached to the wrong CRM entity can misroute a seller, distort scoring, and contaminate reporting even if the underlying observation is valid. Domain matching alone often collapses parent groups, regional entities, and shared brands.

START HERE

Normalize identity evidence.

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. Normalize identity evidence

Evidence or input

Output or decision

Owner and review point

2. Check canonical crosswalk

Evidence or input

Output or decision**Owner and review point**

3. Rank match candidates

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

4. Review ambiguous entities

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

5. Record correction rule

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

Stable identifier crosswalk

Useful when: Reconciling recurring providers

Limitation: Identifiers can be missing or recycled

Suggested action: Validate source and lifecycle

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

Domain-based association

Useful when: Simple single-entity businesses

Limitation: Parents and subsidiaries may share domains

Suggested action: Add entity context

Why this fits our situation

Evidence needed before acting

Constrained fuzzy matching

Useful when: Handling spelling and aliases

Limitation: Similarity can create false matches

Suggested action: Require review for ambiguity

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

Human exception queue

Useful when: Complex purchasing structures

Limitation: Backlog can delay routing

Suggested action: Assign steward and turnaround

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/crm-account-matching/>

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