

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Hand off an account decision with context and ownership

QUESTION

What should a sales and marketing handoff contain in enterprise ABM?

GUIDE TAKEAWAY

A handoff can satisfy a lead-score threshold while leaving the receiving team unable to explain why the account deserves attention. Multiple contacts may be routed separately, existing conversations may be missed, and unanswered questions disappear from the record.

START HERE

Agree handoff criteria.

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 handoff criteria

Evidence or input

Output or decision

Owner and review point

2. Package account context

Evidence or input

Output or decision**Owner and review point**

3. Route to a named owner

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

4. Record the response

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

5. Review failed handoffs

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

Explicit-request handoff

Useful when: A buyer asks for contact

Limitation: Still needs account context

Suggested action: Route to the right owner

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

Account-interest review

Useful when: Signals suggest a project

Limitation: Intent remains an inference

Suggested action: Validate the hypothesis

Why this fits our situation

Evidence needed before acting

Opportunity support task

Useful when: Sales is already engaged

Limitation: Needs shared visibility

Suggested action: Address the current blocker

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/sales-and-marketing-handoffs/>

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