LeadScorer

ENTERPRISE CX, AI & MANAGED OPERATIONS
FIELD GUIDE / 04

Win the workstream. Earn the enterprise contract.

A practical lead generation and appointment-setting system for firms that advise, build, run and improve enterprise operations.

42 CHAPTERS / 8 ENTRY PLAYS / 12 OUTREACH EMAILS

01 / IDENTIFY

Find an operating unit and a decision worth discussing.

02 / QUALIFY

Reach the right owners. Earn a useful next conversation.

03 / PROVE

Separate capacity, cash and margin. Protect the transition.

FREE INDUSTRY PLAYBOOK

OCTOBER 2026

Find the next decision.

Read the model. Pick one entry play. Use the tools before spending expert time.

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A / CHOOSE THE RIGHT PURSUIT

01 Start with a workstream, not a company

WORKING TOOL / Campaign Brief

A multinational can be the right account and still be the wrong opportunity. Its UK service desk, German returns queue and US renewals team may have different budgets, platforms, owners and sourcing rules. A meeting with the group CIO does not automatically open any of them.

This guide is for commercial teams selling **customer experience (CX), AI implementation, business process outsourcing (BPO) and managed operations**. It covers firms that advise, build technology, run processes and improve them over time. It is not a guide to generating consumer enquiries for those firms' clients.

Define the unit you are pursuing

Parent account → buying entity → region → journey or process → workstream → owner → next decision.

An actionable target is: “The UK retail operation's refund-status workflow, owned by customer operations, with an agreed review before peak trading.” “A large retailer with lots of customers” is only a research lead.

Start with a decision you can help the buyer make. Should they renew a service contract, add overflow capacity, put an AI use case into production, fix a digital journey, improve renewal coverage or clear a controlled backlog? Pick one. Do not open with the whole catalogue.

The first conversation should produce a bounded next step: a baseline review, technical fit check, approved sourcing route or a decision not to proceed.

Use this guide in three passes

Stage	Read and do	Leave with
Choose a pursuit	Chapters 1–6 and one entry play	One workstream and a reason to pursue it
Before outreach	Chapters 20–28	Evidence, message, meeting rules and an owner
Before expert time	Chapters 29–36	A real decision, economics and controlled next step

The main constraint to test is **access to a funded, feasible workstream**, not the size of the contact database. If meetings repeatedly die in discovery, repair the brief before increasing outreach.

All schedules, thresholds, scorecards and examples are proposed operating tools. They are not sector benchmarks. All worked numbers and example accounts are fictional. Replace assumptions with approved buyer or provider evidence before making a live decision.

A / CHOOSE THE RIGHT PURSUIT

02 Separate the four commercial engines

WORKING TOOL / Contract Model

An assessment, a platform build, an outsourced service and an AI product can sit inside one account. They are not the same sale. Each needs its own acceptance event, owner, cost basis and route to revenue.

Engine	What the buyer approves	Evidence needed to advance	Commercial trap
Advisory and design	A defined decision or operating plan	Sponsor, decision date and baseline access	Endless unpaid analysis
Engineering and implementation	A working integration, journey or platform change	Architecture, test access and acceptance criteria	Deployment mistaken for business value
Managed operations	An ongoing service with agreed scope and controls	Volumes, service windows, skills and transition	Low unit price without full delivery cost
AI or platform service	Ongoing use and operation of technology	Eligible tasks, usage basis, evaluation and fallback	Model cost mistaken for total operating cost

Build the sequence around the decision

A sensible route might be **workstream review → paid design → controlled implementation → managed operation**. It is not mandatory. A buyer with an approved request for proposal may be past discovery. Another may buy a stand-alone assessment and keep its incumbent.

State what is free, what is paid and who owns the output. Do not manufacture a pilot to evade procurement or label a sales call a workshop when it produces no usable deliverable.

Know what happens when automation succeeds

In a people-priced contract, fewer staffed hours may reduce provider revenue. With transaction pricing, retries may inflate billing unless excluded. With outcome pricing, the provider may carry risks it cannot control.

Before pitching AI, answer: What changes in the buyer's cost? What changes in the provider's revenue? Who pays for technology and monitoring? How will gains be verified and shared?

Consider a base fee for continuing responsibilities and a clear variable unit where justified. It is an option to evaluate, not a universal price structure. Specify volume bands, minimum commitments, service credits and change control.

Pipeline rule: record the first purchasable scope. A small assessment is not a full outsourcing win. A hoped-for global rollout is not contracted value.

A / CHOOSE THE RIGHT PURSUIT

03 Define fit at the operating-unit level

WORKING TOOL / Account Universe

Use company size to find candidates, not to prove demand. A large workforce does not reveal service-contact volume, outsourcing willingness, available budget or the cost of a specific process.

Fit dimension	Record this	Hold or reject when
Workload	Task, case type, volume range and seasonality	There is no meaningful recurring work
Scope	Region, languages, channels and service hours	Required coverage is outside verified capacity
Current model	In-house, outsourced or hybrid; incumbent if confirmed	The mandate excludes your model
Technology	Contact, CRM, knowledge and transaction systems	A hard access or integration restriction blocks delivery
Commercial route	Buyer, review window and sourcing rules	There is no permissible next decision
Economics	Skills, transition, operating costs and payment timing	Plausible scope cannot support contribution
Evidence	Dated source, what it states and what remains unknown	Fit depends on an unverified database label

Exclude early without pretending to know too much

Hold when geography, ownership or the supposed renewal window is unclear. Reject an explicit no-contact instruction, binding conflict, delivery prohibition or procurement exclusion.

“No budget allocated” need not kill early discovery. “No owner, no decision and no willingness to explore one” should stop expensive solution work. Ask for the minimum missing evidence that could reverse the choice.

Start from work that was good for both sides

Review completed engagements by workstream, not only vertical. Compare contribution after transition and rework, retention, time to a useful result, pursuit cost and referenceability. Look for shared traits among engagements that were valuable to buyers and viable to deliver.

Create a narrow campaign cell: “Regional telecom operators reviewing billing-contact operations after a confirmed platform change, with permission to consider hybrid delivery.” Treat this as a hypothesis, not a claim that every firm in the cell needs help.

Write exclusions into the campaign brief. An exclusion protects sellers, brand and delivery more than an impressive but vague addressable-market number.

Action: approve the unit, scope, evidence and exclusions before buying more contact data.

A / CHOOSE THE RIGHT PURSUIT

04 Turn public signals into testable questions

WORKING TOOL / Signal Register

A signal gives you a reason to ask. It does not establish pain, budget, outsourcing intent or dissatisfaction with an incumbent. Record the original source, event date, affected unit and a recheck date.

Observed event	Workstream hypothesis	Safe question
New market or language	Coverage may need a new model	“Who owns service in the new market?”
Merger or acquired brand	Processes or suppliers may overlap	“Which customer process is being standardised?”
Contact-platform migration	Routing or knowledge may need work	“Who owns operations after deployment?”
Public AI programme	A task may need production support	“Which workflow has an operating owner?”
Peak planning	Overflow or exceptions may need capacity	“Is the review about capacity or avoidable contacts?”
Confirmed contract review	Scope may be open to competition	“What can change, and through which route?”
New operations leader	A service baseline may be reviewed	“Which journey is first on the plan?”
New marketplace category	Policy or seller-support work may change	“Where do new exceptions sit?”
New recurring product	Onboarding or renewals may need coverage	“Who owns accounts before renewal?”
Recall or service incident	Approved continuity support may help	“Is there an authorised capacity discussion?”
Shared-services programme	Finance and service handoffs may change	“Which queue creates cross-team rework?”
Procurement notice	A real buying process exists	“Do we meet the entry conditions?”

Write an evidence sentence

“Source X reports event Y on date Z. We infer that workstream W may need review. Pain, funding and supplier change are not confirmed.”

Prefer first-party announcements, public procurement notices, annual reports, product notices and relevant job descriptions. A job advert can suggest a role or technology. It does not prove a funded project or installed system.

Review-site complaints can suggest questions, not incidence rates or causes. Do not turn a sensitive incident into fear-based outreach or suggest access to private facts.

Set freshness by the event. A launch window may expire quickly; an architecture constraint may persist. Recheck when the next action depends on it rather than applying an arbitrary universal expiry.

Action: every active record needs a fact, a labelled inference and one unanswered buying question.

A / CHOOSE THE RIGHT PURSUIT

05 Map the buying group by decision rights

WORKING TOOL / Buying Group

A senior-title list is not a buying group. Map what each person can approve. One person can hold several roles; several people can share a role across regions.

Role to confirm	Titles to research	Decision they influence
Service owner	VP Customer Operations, Support Director	Scope, baseline and operating problem
Economic sponsor	COO, business-unit leader, functional CFO	Funding and business-case approval
Platform owner	CIO, CRM or contact-platform lead	Architecture, access and roadmap
AI owner	AI product owner, data-science lead	Evaluation and production responsibility
Process specialist	Workforce, quality or knowledge lead	Practical operating design
Revenue owner	CRO, renewals or channel leader	Territory, account ownership and attribution
Risk owner	Security, privacy, compliance, model-risk lead	Permitted data, actions, locations and controls
Sourcing owner	Procurement, vendor management	Tender, supplier eligibility and contract
Transition owner	Operations programme lead	Mobilisation and go-live readiness
Workforce stakeholder	HR or employee-relations lead	Workforce implications and required consultation

Run two connected conversations

The **operational conversation** asks whether the work should change and what success means. The **approval conversation** asks whether that change can be bought, implemented and governed. Bring procurement in through the buyer-approved route. Do not bypass it.

One informed owner may be enough for an initial discussion. That person alone cannot approve a production pilot when data, architecture or risk approvals remain unresolved.

Record “role inferred” separately from “authority confirmed.” A positive reply is not proof of budget ownership. A referral is useful when it clarifies the next decision, not merely another email address.

Make the internal forward useful

Give a champion one page: the workstream, baseline, proposed test, people needed and decision requested. Include the strongest reason not to proceed. Ask them to correct it before it travels.

Coordinate through one account owner. Do not send identical pitches from several service lines to multiple executives in the same week. The buyer should receive one coherent conversation.

Action: fill the Buying Group tab with decision rights and evidence, not just contact details.

A / CHOOSE THE RIGHT PURSUIT

06 Prioritise evidence before pursuit size

WORKING TOOL / Bid Gate

A large potential contract does not override a blocked delivery model. Separate **hard gates**, **research priority** and **commercial judgment**. Do not compress them into one impressive lead score.

Pass hard gates first

Confirm an allowed contact route, no conflicting account ownership, plausible service fit and no known delivery prohibition. Unknown means investigate. Explicitly prohibited means stop. A high score overrides neither state.

Then compare five questions: Is there a specific decision? Is the work meaningful? Is the next owner reachable through an allowed route? Can you show relevant proof? Can you staff the next step without hurting live delivery?

A proposed research score can use 0 for absent evidence, 1 for a plausible hypothesis and 2 for support. Keep evidence beside it. The score is **not a probability of buying**.

Candidate	Why it may deserve attention	What could reverse the choice
Healthy existing client's adjacent queue	Context and a trusted relationship exist	Live-service issues or local restrictions
New account's AI production task	A bounded scope can establish a relationship	No knowledge owner or approved access
Confirmed support-contract review	A real purchase event exists	Closed supplier list or unviable scope
Generic global transformation	Potential breadth	No defined unit, owner or decision

Protect scarce specialist time

Set a weekly limit for solution-engineer hours used before qualification. Choose it from actual capacity, not a universal benchmark. Review how many hours produced a buyer-agreed next decision.

Before a full proposal, estimate remaining pursuit cost and contribution if won. Use a range for uncertain win assumptions. Large total contract value does not make weak economics attractive.

Start where the important assumptions can be verified at the lowest cost. Existing-account expansion may beat a net-new bid, but only when the service is healthy and its owner approves.

Action: classify each pursuit as pursue, research, nurture or stop. Name the owner, missing evidence, next action and review date. Fund only the next commitment that the evidence supports.

B / EIGHT CONTRACT-ENTRY PLAYS

07 Play 1: Customer-care renewal or service carve-out

WORKING TOOL / Play Library

Sell the decision: whether a defined queue should remain internal, stay with its incumbent, move to another provider or use a hybrid model. A carve-out is a bounded portion of work, not a promise to replace the whole operation.

Start from a buyer-confirmed review, new language, acquisition integration, service expansion or approved overflow need. Hiring is not proof of failure. Check whether headcount represents growth, replacement or work that must stay internal.

Prepare a queue and transition brief

Confirm before advancing	Why it matters
Queue, region, languages and channels	Global brand does not mean global scope
Service hours, interval arrivals and peaks	Monthly volume cannot establish live-service staffing
Handling, repeat-contact and quality definitions	Creates a comparable baseline
Incumbent being reviewed, extended or supplemented	Distinguishes competition from a rate check
Work that must remain onshore or internal	Determines feasible delivery
Knowledge-transfer owner and change window	Tests whether a safe cutover is possible

Research the customer-operations owner and vendor-management route together. Bring workforce planning into a capacity discussion. Reserve the full solution team until the workstream is clear.

Request a decision-shaped meeting

“Would a short review of the [queue] scope help before you decide whether to extend, supplement or re-tender it? The output would be a transition-risk brief, not a generic capability presentation.”

Begin with aggregate information. Do not request customer recordings in the first email. Ask which delivery alternatives the buyer is genuinely allowed to consider.

Advance: the scope owner confirms meaningful work and an allowed buying route exists. **Nurture:** timing is real but distant. **Stop:** the requested cutover requires unapproved access, unsupported language skills or unsafe overlap.

Show proof from a comparable queue, coverage model and transition. State what your team controlled and what it did not. A list of client logos cannot answer how the service was mobilised.

Expansion path: stabilise the first queue, then review languages, channels, knowledge, quality or automation. Each expansion needs authority and a fresh scope. One contract does not automatically cover every operating country.

B / EIGHT CONTRACT-ENTRY PLAYS

08 Play 2: AI self-service that completes a task

WORKING TOOL / Buyer Case

Sell the decision: whether one customer task can be completed safely through automation and what human service remains. An AI agent here means software permitted to take defined actions in systems, not merely generate text.

Choose a task: checking a refund, retrieving an invoice, changing a delivery instruction within policy or completing an allowed account-access step. Define identity checks, source of truth, action permissions and failure route.

Prepare a resolution-boundary map

Question	Evidence to seek
What proves the task is finished?	A verified outcome or transaction, not “chat ended”
Which requests must never be automated?	Policy, safety and exception boundaries
Can the system read and act through approved interfaces?	Access owner, permissions and test environment
Who maintains knowledge and policy?	Named owner and change process
What happens when the model or a system fails?	Safe stopping state, human routing and context transfer
Who owns failures after launch?	Operating owner, incident route and evaluation schedule

A public AI announcement is a reason to ask which use case has a production owner. It does not prove a stalled pilot or a funded external requirement.

NIST's generative-AI profile addresses risks across the lifecycle, including evaluation and third-party components. It is risk context, not proof that an individual system is safe. [S2]

Request the first meeting

“Before adding automated journeys, would it help to map one task from request to verified completion, including the cases that should go straight to a person?”

Do not claim that an avoided contact removes its full accounting cost. Separate workload released, capacity redeployed, actual spend removed and new technology costs. Chapters 30–31 provide the model.

Production gate: agree the task outcome, evaluation set, permissions, human fallback, data treatment and accountable operator before any launch. A successful demonstration passes none of those gates by itself.

Expansion path: another verified intent, then language or channel expansion after re-evaluation. A working English text flow does not prove that a voice or multilingual version is ready.

B / EIGHT CONTRACT-ENTRY PLAYS

09 Play 3: Agent assist, knowledge and quality operations

WORKING TOOL / Pilot Charter

Sell the decision: which part of an employee's workflow can improve without moving work or risk somewhere else. This is a different sale from replacing human service.

Separate knowledge search, response drafting, summaries, after-contact work, quality review and coaching. One “productivity” promise hides different owners and acceptance tests.

Research a confirmed knowledge consolidation, platform change, product launch or training need. Job adverts can help identify ownership; they do not prove poor performance. Start with operations or quality, then add knowledge and platform owners.

Offer an agent-workflow friction review

Map a representative case from acceptance to completion. Record system changes, search time, customer holds, after-contact work, corrections and escalation. Separate waiting time from active employee effort.

Candidate	Main outcome	Guardrail
Knowledge retrieval	Less verified search effort	Correct and current policy with traceable source
Suggested response	Faster approved response	No unsupported promise or disclosure
Interaction summary	Less after-contact work	Correct facts and complete commitments
Quality assistance	Useful review coverage	Calibrated judgments and human appeal
Coaching support	Better observed behaviour	Fair evaluation and authorised workforce use

Request the first meeting

“Could we compare one agent workflow before and after assistance, including corrections and after-contact work? That would show whether time is being saved or moved.”

Compare cohorts by case mix, tenure, channel and demand. A lower average handling time may reflect easier work. Check which time components the platform records rather than assuming a shared definition. [S10]

Do not sell automatic employee discipline based on model scores. Keep coaching and monitoring within approved workforce policies and applicable requirements.

Proof: show workflow evidence, adoption, quality, rework and a fair comparison. Tool usage is not proof of improvement. Avoid a case study that counts saved after-contact time but ignores extra corrections.

Stop: no reliable knowledge source, no accountable owner or no method to review quality. **Expansion:** knowledge operations, languages, quality and managed monitoring. Autonomous actions require a separate outcome and risk review.

B / EIGHT CONTRACT-ENTRY PLAYS

10 Play 4: Experience and platform change with a run phase

WORKING TOOL / Discovery Map

Sell the decision: whether a specific journey gap needs redesign, integration, migration or better operation. Do not assume the answer is a replacement platform.

Entry points include CRM or contact-platform migration, acquisition integration, self-service failure, disconnected commerce and support, or a new digital product that generates service work.

A web team may own the journey while operations handles its failures. IT may own the platform while nobody owns knowledge after go-live. Treat this as a discovery question, not an outside diagnosis.

Prepare a journey-to-operation dependency brief

Layer	Map before pricing
Journey	Trigger, completion event, customer effort and failed path
Platform	CRM, routing, commerce, cases and identity
Data	System of record, ownership, permissions and update frequency
Integration	Read/write actions, retries, reconciliation and failure handling
Adoption	Training, knowledge, accessibility and agent workflow
Run service	Monitoring, incidents, change backlog and accountability

Map the experience owner, architect, business process owner and future service owner. Ask who runs the workflow after the project team leaves.

Request the first meeting

“Is the [journey/platform] project also covering what happens when customers cannot finish the task, and who owns that work after launch?”

Compare real alternatives: fix the current platform, use native features, engage another integrator, build internally or change the process without new software. A credible “keep what works” option makes the discussion useful.

Start with a high-level architecture conversation. Never ask cold prospects for credentials, restricted diagrams or production logs. Arrange authorised access only through the security process.

Advance: there is a journey, sponsor, architecture owner and credible route to scope funding. A technical curiosity call without a business decision remains technical discovery.

Proof: show a comparable workflow, deployment boundary, integration responsibility, adoption result and post-launch operating model. A partnership badge is not proof of every delivery capability.

Expansion: scoped build, explicitly priced run service, then evidence-based improvement. Count each only at its own accepted stage, not as one assumed transformation contract.

B / EIGHT CONTRACT-ENTRY PLAYS

11 Play 5: Outsourced revenue, renewals and channel coverage

WORKING TOOL / Pursuit Funnel

Sell the decision: which customer segment needs a different coverage model and what the provider can own. Demand generation, inside sales, customer success, renewals and channel operations have different controls.

Keep two funnels separate

Provider acquisition: your team wins an enterprise contract to run a workstream.

Client revenue delivery: the contracted team generates, progresses, supports or renews the client's customers.

A meeting in the second funnel is not a new client in the first. Never mix counts, revenue or acquisition costs.

Workstream	Entry hypothesis	Buyer to research	Evidence
Inside sales	A segment lacks suitable coverage	Regional sales or revenue operations	Accepted opportunities and attributed revenue
Renewals	A cohort needs earlier intervention	Customer success or renewals	Eligible cohort, exclusions, retention and margin
Channel operations	Partners are recruited but not activated	Channel leader	Active partners and accepted commercial output
Advertiser lifecycle	Small advertisers need onboarding support	Ad sales or monetisation	Activation, retention, spend quality and policy
Sales support	Quotes or administration slow sellers	Sales operations	Cycle time, errors and usable seller capacity

Offer a coverage-and-attribution brief

Define eligible accounts, territories, ownership, existing coverage, commercial goal, handoff, attribution window and exclusions. Use the client's CRM definitions.

“Would it help to isolate one under-covered segment and agree what an outsourced team would own, what your sellers retain and how incremental results would be measured?”

Ask who controls pricing, product fit, closing, channel conflict and approval. Do not guarantee closed revenue when these remain outside the provider's control.

Advance: a defined segment, approved data route and a named person to accept or reject handoffs. If internal follow-up capacity is absent, repair it before adding demand.

Proof: cohort-level output with attribution and the work actually performed. Separate pass-through advertising spend from provider service revenue.

Expansion: adjacent segments, customer success or partner operations. A good result in one cohort does not give permission to reuse client data or contact customers outside the agreed scope.

B / EIGHT CONTRACT-ENTRY PLAYS

12 Play 6: Trust, safety, identity and controlled casework

WORKING TOOL / Play Library

Sell the decision: how to handle a defined policy or risk queue correctly, consistently and within its response window. Moderation, identity checks, fraud review and regulated casework are not interchangeable analyst seats.

For content, ask about policy, language, priority and appeals. For identity or fraud, ask what evidence reviewers may access and which actions they may approve. For regulated work, establish where professional judgment must remain.

A new category, market or confirmed backlog can justify a question. A public incident does not prove that the prospect is unsafe or non-compliant.

Prepare a queue-control map

Define	Why it changes the pursuit
Policy taxonomy and version	Accuracy needs a stable reference
Priority and harm level	Low-risk volume must not hide urgent cases
Decision and escalation rights	Defines what the provider can do
Review and appeal	Supports corrections without inflating throughput
Data and location	Determines feasible sites, systems and staffing
Reviewer support	Includes training, exposure controls and wellbeing
Surge and incident response	Separates normal capacity from crisis cover

Request the first meeting

“Could we map one queue from intake through decision and appeal, including the cases that must remain with your internal team?”

Start with the policy or queue owner. Add risk, legal, security and operations as required. A customer-service title does not establish authority over trust-and-safety policy.

Where UK financial-services outsourcing rules apply, the regulated firm retains responsibility. Do not position outsourcing as a transfer of regulatory accountability. [S4]

Proof: comparable policy complexity, calibration, review turnaround and escalation handling. Volume processed alone is insufficient.

Stop: undefined policy, unavailable escalation cover, unsupported regulated work or a request to maximise approvals, removals or recoveries regardless of correctness.

Expansion: adjacent queues, languages, quality review or policy operations only after fresh calibration, access and staffing checks. This is a controlled operating service, not an unlimited pool of interchangeable labour.

B / EIGHT CONTRACT-ENTRY PLAYS

13 Play 7: AI data, evaluation and ongoing model operations

WORKING TOOL / Pilot Charter

Sell the decision: what evidence the buyer needs before trusting a model or workflow, and who maintains that evidence. This is not the same as implementing a customer-facing bot.

Work can include permitted data preparation, labelling, human evaluation, multilingual review, task-specific testing, feedback and production-quality monitoring.

A funded product release, language launch, policy change or model update may create a need. Ask which deployment decision depends on the work. “We need more data” is incomplete without intended use and acceptance.

Prepare an evaluation-coverage brief

Item	Required definition
Task	What the system must do
Data rights	Why these records may be used for this purpose
Evaluation set	Representative cases, difficult exceptions and held-out examples
Rubric	Correctness, completeness, policy and severity
Reviewer process	Training, calibration, disagreement and escalation
Release decision	Pass, revise or stop, with an approver
Continuing work	Re-evaluation after material system or policy changes

Research the AI product owner, evaluation lead, data-governance owner and operating lead. Procurement may buy units, but the technical owner must define usable output.

NIST discusses downstream quality risks from data and third-party components. Include evaluation-data quality rather than treating labels as unquestionable ground truth. [S2]

Request the first meeting

“Which release decision is the evaluation meant to support, and where is your current test set least representative of real use?”

Do not price every example as equal. A simple label, specialist review and multilingual adjudication have different costs. Define rejected work, rework and acceptance before unit pricing.

Avoid evaluation leakage. Do not tune on the same examples used to claim independent performance. Record versions of models, prompts, policies, retrieval sources and tests where relevant.

Advance: lawful access, task owner, agreed rubric and a release or operating decision. **Stop:** no data rights or no valid evaluation route. **Expansion:** recurring quality operations, then adjacent tasks or languages with separate validation.

B / EIGHT CONTRACT-ENTRY PLAYS

14 Play 8: Finance, receivables and service-linked back office

WORKING TOOL / Play Library

Sell the decision: how to resolve a transaction or exception queue without creating errors, customer harm or accounting confusion. Billing enquiries, invoice disputes, cash-application exceptions, order-to-cash handoffs and permitted collections support are distinct scopes.

Follow one exception

A customer questions a charge. Service forwards it to finance. Finance lacks order context. The customer calls again. Selling a cheaper service agent leaves the loop intact.

Research the owner across service, billing and finance. Establish who changes policy, corrects the transaction and sends final confirmation.

Question	Decision it unlocks
Which case types enter the queue?	Scope and skills
Who can approve adjustments or payment arrangements?	Authority boundaries
Which system holds the authoritative balance?	Reliable customer information
What does resolved mean?	Completed financial work versus closed tickets
How do disputed or high-risk cases escalate?	Safe routing and approved decisions
How are rework, write-offs and recoveries measured?	A defensible performance claim

Offer an exception-flow brief

“Could we trace one billing exception from customer contact to ledger update and final confirmation? That would show whether the fix sits in service, finance or the handoff.”

For collections, confirm jurisdiction, permissions, customer protections and authorised escalation before designing live work. Do not use aggressive scripts, unrelated personal data or promises of recovery as a shortcut to qualification.

Keep the economics honest

Collected customer money is not automatically provider revenue. Faster collection improves cash timing; it does not automatically create revenue or profit. Separate recovery fees, transaction charges and managed-service fees.

A change in days sales outstanding may reflect customer mix, payment terms or seasonality. Define the eligible portfolio, comparison, disputed amounts and exclusions before attributing the change to the service.

Advance: one queue, authorised process owner, reconciliation method and explicit approval limits. **Expansion:** adjacent exceptions, documents, communication or analytics after the first loop is controlled.

Add AI only where information quality, allowed actions and accountable review make it appropriate. Do not automate a broken cross-team process just to shorten the demo.

C / VERTICAL CAMPAIGN CARDS

15 Banking, payments and insurance

WORKING TOOL / Play Library

These are campaign hypotheses, not claims about any prospect. Choose one regulated entity, product and process. Confirm local requirements with the buyer's specialists.

Banking and payments: disputes and servicing

Entry signal: a new product, acquisition, servicing-platform change or confirmed review of a dispute queue.

First owner: Head of Servicing, Card Operations or Disputes. Map fraud operations, compliance, customer support and the economic sponsor separately.

Opening question: “Is the review focused on the first customer contact, the investigation queue or keeping the customer informed while the case is open?”

First asset: a contact-to-case map covering authentication, intake, evidence, escalation, status updates and closure. Mark decisions that must remain with the institution.

Qualify: case types, jurisdiction, service rules, sensitive data, authority, incumbent scope, complaints, approved delivery locations and change window. Ask how unresolved cases are owned during handoffs.

Measure: case age, correct routing, rework, completed outcomes and repeat contacts. Faster closure is not better if the decision is wrong.

Stop: unapproved autonomous decisions, concealed subcontracting or an expectation that outsourcing transfers accountability. FCA guidance makes retained responsibility explicit where applicable. [S4]

Insurance: claims intake and status updates

Entry signal: a portfolio acquisition, distribution launch, claims-system change or planned surge review. A catastrophe is not permission for pressure-based selling.

First owner: Claims Operations or policy servicing. Separate intake from licensed assessment, coverage decisions, settlement authority and broker service.

Opening question: “Which part of the claims journey generates follow-up work that could be reduced without changing who makes the coverage decision?”

First asset: a claims-status brief covering required evidence, customer messages, missing-document loops and urgent escalation.

Qualify: product line, policy and claim systems, authority limits, data, surge assumptions, partner roles, vulnerable-customer needs and capacity decision date.

Measure: complete intake, appropriate escalation, time to the next valid step and customer comprehension. Settlement value alone cannot establish service quality.

Expansion: prove one process before adding languages, agent assist or broader administration. A successful intake queue does not validate an entire claims portfolio.

Message discipline: do not infer non-compliance, understaffing or buying intent from an annual report. Ask a precise question that an informed owner can correct.

C / VERTICAL CAMPAIGN CARDS

16 Healthcare and energy services

WORKING TOOL / Play Library

Administrative support must not drift into promises about clinical judgment, eligibility, vulnerable customers or safety-critical work. Define the service boundary before the list.

Healthcare: access, scheduling and member service

Entry signal: a new region, payer programme, provider acquisition or approved access-centre review.

First owner: Patient Access, Member Services or Contact Centre Operations. Add clinical governance when the boundary touches care, and privacy/security before sensitive information is exchanged.

Opening question: “Is the priority completing an administrative task, or reducing handoffs when it needs a specialist?”

First asset: an administrative journey map covering identity checks, scheduling or status, exclusions, approved information and specialist escalation.

Qualify: payer versus provider; administrative versus clinical scope; populations; languages; accessibility; protected data; urgency; systems; approved access and specialist cover.

Measure: task completion, correct routing, abandoned attempts, repeat contacts and appropriate escalation. Shorter calls must not substitute for safe access.

In relevant US arrangements, HHS guidance describes business-associate status and written safeguards for protected health information. Determine applicability before sharing that information. [S5]

Stop: a request for diagnosis, clinical triage or restricted work outside authorised capability. Use aggregate or synthetic information during early sales discussions.

Energy and utilities: billing, moves and exceptions

Entry signal: a tariff or billing-platform change, market expansion or confirmed service review.

First owner: Customer Operations or Billing. Map collections, vulnerability support, digital and emergency-response ownership separately.

Opening question: “When customers cannot complete a move or billing task online, where does the unresolved work go?”

First asset: a move-in/move-out or bill-query map with account validation, meter or billing data, exceptions, handoff and confirmation.

Qualify: market, customer type, permitted advice, emergency exclusion, accessibility, dispute routes, systems, seasonality, hours and approved delivery locations.

Measure: completed transactions, repeat contacts, corrections and suitable escalation. Routine account work must remain distinct from emergency or essential-service decisions.

Expansion: one administrative journey to knowledge, coverage or automation under a new approval gate.

Message discipline: a public disruption is not proof that outsourcing would solve it. Ask about an approved planning process rather than promising to fix an incident you have not diagnosed.

C / VERTICAL CAMPAIGN CARDS

17 Retail, ecommerce and travel

WORKING TOOL / Play Library

Distinguish temporary demand, avoidable work and structural process failure. Each leads to a different offer and contract.

Retail and ecommerce: post-purchase exceptions

Entry signal: a new market, fulfilment route, returns-policy change or confirmed peak-planning window.

First owner: Customer Care or Ecommerce Operations. Add logistics, payments, digital product and finance when the exception crosses their systems.

Opening question: “Does the peak plan focus on extra capacity, or on completing order and refund tasks without another contact?”

First asset: a post-purchase exception map. Pick order status, late delivery, returns or refund status. Identify the source of truth and the action service staff can take.

Qualify: store versus online scope, brands, countries, languages, order and fulfilment systems, refund authority, fraud checks, stock rules, contact patterns and change freeze.

Measure: verified completion, repeat contact, refund accuracy, exception age and total cost. A contact avoided is not proof of a retained order.

Expansion: solve one loop, then test languages, channels or product categories with fresh volume and policy checks.

Travel and transportation: disruption and after-sales service

Entry signal: route expansion, reservation-system change or a planned continuity review.

First owner: Customer Operations, Guest Services or Disruption Operations. Map authority to change, refund or rebook separately from the service queue.

Opening question: “Where does the flow break when a request falls outside normal rebooking or refund rules?”

First asset: a normal-versus-disruption service brief. Define allowed actions, partner dependencies, priority cases, agent authority and surge activation.

Qualify: direct versus intermediary bookings, reservation and payment access, supplier rules, languages, time zones, refunds, compensation decisions and escalation cover.

Measure: correct completion, repeat contacts, time to a valid next step, error cost and customer effort. Do not promise one handling time across routine and disrupted journeys.

Stop: urgent coverage requires training or access that cannot be completed safely. Offer a future continuity review instead of an impossible mobilisation date.

Message discipline: avoid “we will cut costs during your busiest week.” Lead with the decision, exclusions and safe implementation window. A larger queue is not automatically an outsourcing opportunity.

C / VERTICAL CAMPAIGN CARDS

18 Technology, telecom and media

WORKING TOOL / Play Library

Choose the economic job before the persona. Technical support, renewals, advertiser growth and subscription retention are different campaigns.

Technology and consumer electronics: support or renewals

Entry signal: a product launch, channel expansion, acquisition or confirmed coverage change.

First owner: Support Operations for technical cases; Customer Success or Renewals for recurring accounts; channel leadership for partner work.

Support question: “Which cases can the first-line team complete, and which lose context on the way to engineering?”

Renewals question: “Which cohort needs coverage your team cannot give it without duplicating named-account ownership?”

First asset: a support-tier boundary map or an eligible-renewal cohort brief. Pick one.

Qualify: complexity, entitlement, tiers, authorised diagnostics, warranty rules, systems, languages, territories, reliable renewal dates and commercial authority.

Measure: resolved issues, proper escalation, age and quality for support. For renewals, use the eligible cohort, retained revenue, margin and exclusions. Product usage is not a renewal.

Expansion: support to knowledge/quality, or one renewal segment to adjacent segments. Do not combine the two cases to inflate the business case.

Telecom and media: activation, billing or retention

Entry signal: a subscriber-platform change, new bundle, service launch or customer-journey review.

First owner: Customer Operations, Retention or subscriber operations. For an advertising platform, target the advertiser-lifecycle owner instead.

Opening question: “Is the priority correct first activation, fewer billing follow-ups or a better cancellation conversation?”

First asset: one journey map with policy limits on credits, retention offers, cancellation and technical escalations.

Qualify: customer type, bundle, sales versus service authority, approved offers, billing access, fault boundaries, subcontracting, hours, quality and complaint rules.

Measure: successful activation, correct first bill, repeat contact and customer-understood outcomes. Do not reward agents solely for preventing cancellation. Friction or an unsuitable offer is not sound retention.

Expansion: repair the handoff before expanding headcount. Add AI only with a defined task, knowledge owner, permissions and fallback.

Message discipline: churn and complaints may frame a question. They do not establish which workstream caused the result or whether an outside provider is wanted.

C / VERTICAL CAMPAIGN CARDS

19 Automotive and public-service programmes

WORKING TOOL / Play Library

A brand, dealer, finance arm, agency and programme office can share a customer journey without sharing buying authority.

Automotive and mobility: ownership and service

Entry signal: a connected-service launch, vehicle launch, dealer-system change or regional expansion.

First owner: Customer Experience, Aftersales, Connected Services or Mobility Operations. Confirm whether the manufacturer, dealer group, finance business or platform owns the contract.

Opening question: "When an owner starts a request digitally, who owns completion if the next step sits with a dealer or another unit?"

First asset: an owner-to-service handoff map: identity, entitlement, appointment, dealer confirmation, status and exception.

Qualify: market, product, dealer responsibilities, warranty authority, technical scope, safety exclusions, customer/vehicle data, scheduling access, language and hours.

Measure: completed handoffs, correct appointments, repeat contacts, exception age and appropriate escalation. Do not claim that a contact-centre change improves vehicle safety or repair quality without evidence.

Expansion: one ownership journey before dealer support, finance servicing or connected-service operations. Each requires its own authority.

Public services: information and administrative support

Entry signal: a public procurement notice, programme launch or authorised market-engagement event.

First owner: programme owner and the procurement contact named in the process. Respect the prescribed communication route.

Opening question: "Which parts of the service can a supplier operate, and which decisions must remain with the public body?"

First asset: an eligibility and scope checklist based on public information. Do not offer private help to shape evaluation criteria or bypass competition.

Qualify: supplier eligibility, accessibility, language, records, security, location, continuity, background requirements, contract terms, mobilisation and clarification rules.

Measure: access, correct information, task completion, equitable service and suitable escalation. Contact volume is not a programme outcome.

Stop: missing mandatory eligibility, improper influence as the only route or a required capability that cannot be delivered.

Expansion: only through a valid contracting route. A relationship with one programme does not authorise another.

Message discipline: never imply an endorsement, certification or procurement status that has not been granted. A compliant early market discussion is not a contract award.

D / BUILD AND RUN OUTREACH

20 The account-research procedure

WORKING TOOL / Signal Register

Assign one researcher and one account owner. Research structure before buying contact records. The output is a usable workstream brief, not a dossier.

Pass 1: decide whether the pursuit is real

Read the official site and the most relevant first-party announcement or notice. Identify what the company sells, the affected unit and the process your service could address. Check CRM ownership, open opportunities, existing contracts, previous refusals and suppression.

Stop if the signal is irrelevant, delivery is outside scope or another team owns the conversation. Do not buy contacts for a failed account.

Pass 2: make one workstream testable

Field	Good entry	Weak entry
Unit	UK ecommerce service operation	Global company
Workstream	Refund status after returns approval	CX improvement
Signal	Dated announcement with a named change	Seems to be growing
Hypothesis	May need a new status handoff	Has terrible service
Owner	Role and confirmed responsibility	Anyone C-suite
First offer	One-page dependency map	Free transformation audit
Important unknown	Whether order data can support service	Unrelated executive facts

Record the actual URL and date. Keep the fact and interpretation separate. A job description can suggest a role or system, not a funded programme.

Enrich only the next useful contacts

Find the operational owner and one relevant approval role through legitimate sources. Verify role, employer, geography and details. Technical deliverability is not permission to market. Apply the regional review in Chapter 36.

Use no leaked customer records, credentials or unrelated personal details. Public means observable, not automatically reusable for every purpose.

Release the record through a quality check

The account owner checks workstream, evidence, delivery fit, contact route and existing activity. The researcher records a next action and review date.

Start with a batch small enough to inspect every record. Increase capacity only when sales uses the briefs and source quality holds. If sellers repeatedly discard records, fix the definition of fit before asking researchers to produce more.

Output: one brief that makes the first conversation intelligible to both the buyer and the receiving seller.

D / BUILD AND RUN OUTREACH

21 Use the channel that fits the buying route

WORKING TOOL / Campaign Brief

Choose distribution from the buying conditions. Cold email is not automatically the primary route to every enterprise contract.

Route	Best use	Action	Control
Existing account	Adjacent work with a healthy service record	Ask the account owner to validate one gap	Do not bypass the relationship
Technology partner	A project needs complementary delivery	Build a joint workstream brief	Check eligibility, conflict and sharing permissions
Approved referral	A trusted contact knows the process owner	Request an introduction for one decision	Do not overstate endorsement
Procurement	Formal competition or market engagement	Check eligibility and follow the route	Respect clarification rules
Event	A buyer discusses a relevant business topic	Offer the matching brief	Attendance is not permission
Targeted outbound	Evidence suggests an unowned opportunity	Contact an appropriate owner	Apply contact rules and stop instructions

A partner brief that can be used

State the unit, workflow, decision, platform, your role, partner role, evidence, commercial route and one introduction requested. Add what you will not sell into the account.

Microsoft describes co-selling as collaboration with separate programme statuses and eligibility. A partnership does not automatically qualify every offer for funding or marketplace benefits. Verify the programme before claiming either. [S11]

Events should create context, not a blast list

Choose relevant sessions and public business topics. After a real conversation, send the promised asset and refer to the decision actually discussed. Do not write “great meeting you” when you only saw a name on an attendee list.

Keep account activity coherent

One owner should see direct, partner, event and service-line activity. Log the introduction source and current conversation before the next message.

A partner introduction and a cold reply from the same account are not two opportunities unless they concern separately qualified workstreams. Several relevant contacts can support one buying decision.

Measure accepted opportunities and buyer-agreed next steps by route. A large stack of signed partnerships is not a distribution channel if none produces useful customer conversations.

Action: choose the closest credible route for the first cohort. Add another route to solve a specific access problem, not to create more activity.

D / BUILD AND RUN OUTREACH

22 Email set 1: service scope and renewal

WORKING TOOL / Campaign Brief

These are original starting points, not performance-tested scripts. Replace brackets with verified information. Offer an asset only after it exists. Use a lawful route and your approved sender block: real identity, company, contact details, required address, commercial disclosure where applicable and an easy opt-out. B2B email is not exempt from US CAN-SPAM requirements. [S7]

1. Confirmed service review

Use a buyer-confirmed review, not a renewal date inferred from contract age.

> Subject: [queue] review
>
> Hi [Name],
>
> You mentioned that [queue/region] is being reviewed before [confirmed date].
>
> Is the decision mainly about keeping the current model, adding coverage or changing providers?
>
> We can help compare the scope, handoffs and transition requirements before you commit to a route. The starting point is a one-page queue brief, not a full proposal.
>
> Would that be useful for the review?

If they engage, confirm the sourcing route and next decision before requesting detailed volumes.

2. New region or language

Use a verified expansion that your delivery team can support.

> Subject: support for [market]
>
> Hi [Name],
>
> I saw the announcement about [verified expansion].
>
> How is customer support being set up for [market/language]: within the current team, through a local partner or through a shared operation?
>
> We help define the service boundary, coverage and escalation path before a new queue goes live.
>
> Would a short coverage checklist help with that planning?

Do not imply the current team cannot cope. The work may already be staffed.

3. Capacity versus avoidable work

Use while there is still a safe planning window.

> Subject: [season] service plan
>
> Hi [Name],
>
> For [region/brand], is the [season] plan mostly about extra support capacity, or are you also reviewing repeat order and refund questions?
>
> Those are different decisions. Extra cover handles demand; fixing the task can remove some of it.
>
> We have a brief that separates the two and maps transition risks.
>
> Worth sending over?

When the change window is closed, offer a later review. Do not invent a rapid transition promise. A useful email leaves room for correction and offers one bounded next step.

D / BUILD AND RUN OUTREACH

23 Email set 2: AI and platform work

WORKING TOOL / Campaign Brief

Use a production decision, employee workflow or post-launch responsibility as the reason for the conversation. “AI transformation” is too broad by itself.

4. Pilot to operating service

A public AI initiative is relevant; production ownership may still be unknown.

> Subject: [workflow] beyond the pilot
>
> Hi [Name],
>
> I saw [verified announcement] about your AI programme.
>
> Is [workflow] already running in production, or is the next decision about which tasks it can safely complete?
>
> We help map eligible requests, system actions, human fallback and the measures needed for that decision.
>
> Would a one-page production-boundary checklist be useful?

Ask who owns the outcome after launch. Do not claim the pilot has stalled.

5. Agent-assist workflow

Use when knowledge, agent tools or quality operations are under review.

> Subject: where agent time goes
>
> Hi [Name],
>
> With [verified platform or process change], are you measuring the effect on the full agent workflow, including corrections and after-contact work?
>
> We help teams separate time removed from time shifted into another step.
>
> The starting point is one case type, one comparison and a quality check.
>
> Would it help to share the worksheet?

Only use proof that compares similar work. Do not disclose another client's restricted screenshots.

6. Platform deployment to run ownership

Use a confirmed project with a plausible operational handoff.

> Subject: after [project] goes live
>
> Hi [Name],
>
> I saw [public detail] about [project].
>
> Who will own the service workflow after the build team hands it over, particularly knowledge changes, exceptions and ongoing improvement?
>
> We help connect platform work with the team that runs the service.
>
> Would a short handover checklist be relevant to your plan?

This asks about ownership rather than offering to replace a platform already selected.

Match the next step: send the task boundary, workflow comparison or run checklist. Resource interest is not permission to request logs or schedule a long workshop.

D / BUILD AND RUN OUTREACH

24 Email set 3: revenue, trust and AI data

WORKING TOOL / Campaign Brief

These scopes belong to different owners. Route them separately even inside the same account. Use accurate identity and the approved contact controls on every message.

7. Revenue coverage

Use a defined segment, region, product or renewal cohort.

> Subject: coverage for [segment]
>
> Hi [Name],
>
> I saw [verified change] around [segment/market].
>
> Is that group fully covered by your sales and customer-success teams, or is the coverage model still being decided?
>
> We help define which accounts an outsourced team would own, where your sellers stay involved and how results would be measured.
>
> Would a segment-coverage brief be useful?

Ask whether the gap is finding, progressing, closing or renewing demand. Not every gap needs more appointments.

8. Trust-and-safety queue

Use a new category, policy or market with plausible relevance.

> Subject: [category] review workflow
>
> Hi [Name],
>
> With [verified launch/change], is the process for [case type] staying in the current queue or getting a separate workflow?
>
> We help map policy ownership, review capacity, quality checks and escalation before adding volume.
>
> The first step would be a queue-control brief, not a proposal to change your policy.
>
> Would that be useful to the team?

Do not imply the platform is unsafe, unlawful or failing its users. None of those facts has been established.

9. Evaluation coverage

Use a task, model or language release with an evaluation owner.

> Subject: testing [task/language]
>
> Hi [Name],
>
> I saw [verified product or language announcement].
>
> How are you checking that [task] works across the cases users bring, including difficult exceptions?
>
> We help define evaluation coverage, reviewer calibration and acceptance rules before scaling the work.
>
> Would a short evaluation-brief template be relevant?

Ask what release or operating decision the evidence supports. Cheap labels without a task definition are not yet an evaluation opportunity.

Send test: name a real workstream, invite correction and offer a useful asset. Without a verified event, remove the event claim and ask an honest role-relevant question.

D / BUILD AND RUN OUTREACH

25 Email set 4: exceptions and cross-team journeys

WORKING TOOL / Campaign Brief

Use these when the opportunity is a handoff rather than a whole department. Keep restricted decisions outside scope unless capability and buyer approval have been established.

10. Billing exceptions

> Subject: [billing case] handoffs
>
> Hi [Name],
>
> Does [case type] sit entirely with finance, or does customer service handle the follow-up while it is open?
>
> We help map the loop from customer contact to transaction correction and final confirmation.
>
> That can show whether the next fix belongs in service, finance or the handoff.
>
> Would the exception-flow worksheet be useful?

Research the likely process and role first. Do not state that a backlog exists unless confirmed. Ask who can reconcile a changed balance and who must authorise a customer commitment.

11. Administrative healthcare journey

> Subject: completing [administrative task]
>
> Hi [Name],
>
> For [programme/region], who owns the full [scheduling/status] journey when a request needs more than one team?
>
> We help define administrative steps, approved information and the specialist handoff so the service boundary is clear.
>
> No patient records are needed for the initial discussion.
>
> Would a one-page journey checklist help with your review?

This concerns an administrative workflow. It is not clinical triage, medical advice or an attempt to access protected records. Confirm population, urgency and specialist cover before any live scope is discussed.

12. Digital journey into assisted service

> Subject: when [task] cannot be completed
>
> Hi [Name],
>
> When customers cannot finish [task] online, does the next team receive the context, or is that handoff part of an upcoming review?
>
> We help map the digital steps and assisted-service exceptions together.
>
> The output is a short brief showing what needs to change, who owns it and what can stay as it is.
>
> Worth sharing?

The buyer can clarify whether this belongs to digital, operations, IT or nobody's present priority. A clear “not a priority” is useful information.

Keep the boundary clear: a free checklist is not a custom integration or production-ready design. Prepare the promised asset first. Apply the approved sender and contact controls.

D / BUILD AND RUN OUTREACH

26 Calls, LinkedIn and buyer replies

WORKING TOOL / Meeting Gate

The first exchange confirms relevance and ownership. Identify yourself, use an approved route and respect a refusal.

Phone and LinkedIn openings

“Hi [Name], it's [Name] from [Company]. This is a business-development call about [workstream]. I saw [verified event]. Have I reached the person who owns that decision, or does it sit elsewhere?”

When relevant: “Is the review about capacity, how the process works, or both?” Listen before proposing a specialist meeting.

A LinkedIn note can say: “Your post on [actual topic] raised the handoff between [team A] and [team B]. We work on that boundary in [service]. Happy to share a short checklist.”

Use permitted platform features. A connection acceptance is not permission for unrestricted email or phone marketing. Voicemail should not imply an existing relationship or a false operational emergency.

Handle the reply, not your preferred pitch

Response	Useful answer	Next action
We have an incumbent	“Is the review about replacement, improvement or work outside their remit?”	Map a genuine gap
Send information	“Is [workstream A] or [B] closer to the review?”	Send one asset
We do AI internally	“Is the gap in the build, evaluation or ongoing operation?”	Complement or close
No budget	“Is a decision being scoped, or should we leave this until planning?”	Separate early interest from no need
Speak to procurement	“Which process should we use, and is scope defined?”	Follow the route
Not now	“Is there an event when a follow-up would be useful?”	Record buyer-led timing
Guarantee savings	“Not responsibly without the baseline, exclusions and costs.”	Offer the test method
Stop contacting me	“Understood. I will stop.”	Suppress promptly

When a meeting is welcome

Confirm topic, participant, intended output and time zone. Offer suitable times or a scheduling link according to preference. Do not send an invitation before agreement.

Record the buyer's actual meaning. Polite curiosity is not project intent. A refusal is not an objection to overcome through another channel.

The reply owner should leave the record in a clear state: meeting proposed, asset sent, referred, nurture at an agreed point, no fit or suppressed.

D / BUILD AND RUN OUTREACH

27 A bounded sequence and a working reply desk

WORKING TOOL / Launch Board

A sequence is a ceiling on attempts, not an instruction to keep contacting someone who has refused. Local law, channel rules and recipient preferences take priority.

A starting sequence to test

Step	Purpose	Useful content	Stop or branch
First contact	Confirm the workstream	One verified event and question	Wrong role: ask once for direction
Later follow-up	Add new value	Relevant checklist or decision boundary	No new value: do not send filler
Optional permitted channel	Make context accessible	Same topic, not a second service pitch	Never evade a refusal
Final message	Close the loop	Offer the resource and pause	Archive without a fresh reason and allowed route

Intervals should reflect the buyer, event and account owner's plan. This is not a universal cadence. Avoid daily pursuit of senior buyers across channels. Active conversations leave automation immediately.

Staff the reply desk

Assign a primary owner and cover. Respond during the buyer's business hours as promptly as actual staffing allows. Record receipt, first meaningful response and next action. Do not promise response speeds the team cannot deliver.

Separate workstream interest, information requests, wrong role, timing, procurement, no fit, opt-out and automated replies. Courtesy messages and automatic responses are not positive intent.

Technical controls

Use approved sending identity and authenticated infrastructure. Verify data quality, monitor failures and complaints, and follow provider requirements. Google's sender guidance concerns authentication and behaviour; meeting it does not confer marketing permission. [S9]

Do not use fabricated warm-up activity, rotating identities or domains to evade spam controls. Protect the company's security and brand as well as deliverability.

Learn where work stops

Relevant replies without bookings can signal a poor meeting offer. Held calls rejected by sales can signal qualification failure. Opportunities that stall in solution design can signal weak scope, economics or approval access.

Inspect actual conversations before changing the campaign. More sending cannot repair a missing buyer-owned decision.

Scale gate: increase volume only when research, reply handling, sellers and specialists can absorb the next step. Measure the useful output, not the activity that is easiest to count.

D / BUILD AND RUN OUTREACH

28 Define a meeting that deserves to happen

WORKING TOOL / Meeting Gate

Separate **ready to book**, **held** and **sales accepted**. The workbook and web checker assess readiness only. A person confirms attendance and acceptance later.

Readiness check	What counts as Yes
Allowed route	Contact and proposed discussion passed the applicable review
Workstream	A bounded journey, queue or process is named
Participant	The person understands, owns or can route the decision
Buyer interest	They agreed to discuss this issue, not merely connect
Unit and geography	Entity or region is clear enough to route the call
Capability fit	No known hard requirement exceeds verified ability
Meeting purpose	Buyer understands agenda and intended output
Internal owner	A seller accepts responsibility for the conversation

A No on the allowed route or capability fit stops this path. A No, Unknown or blank elsewhere means hold and resolve it. All Yes means **ready to book**, not a guaranteed opportunity.

Use the lightest useful meeting

An ownership call finds the right participant. Scoped discovery tests a need. Technical discovery checks a known dependency. Procurement discussion clarifies the route.

Do not put all four into one invitation. A senior attendee does not turn an introductory discussion into qualified project discovery.

A fully approved budget or final architecture need not exist before early discovery. But deep engineering work needs a decision, sponsor and credible approval path. Do not confuse a useful early discussion with a funded buying project.

Review sales acceptance after the call

Record whether it happened, who attended, whether the promised topic was discussed and whether the receiving team accepts it under agreed criteria.

Use specific rejection reasons: wrong workstream, no buyer agreement, unsupported scope, duplicate opportunity, unsuitable participant or misleading invitation. Do not reject a well-scoped first call solely because the sale did not close.

Where payment or incentives depend on meeting events, use written definitions. Do not reward a setter for a meeting the buyer never knowingly accepted.

Action: agree the gate before launch, then review both seller rejection and buyer experience. Changing the criteria after results arrive makes measurement unreliable.

D / BUILD AND RUN OUTREACH

29 Discovery and handoff that move a decision

WORKING TOOL / Discovery Map

Send the agenda before the call. Ask only what is needed for its purpose, then follow the buyer's answers rather than reading a long checklist.

Time in a 30-minute call	Topic	Output
0–5 minutes	What made this discussion useful?	Named decision and owner
5–12 minutes	Current process and exceptions	Scope, workload, systems and unknowns
12–20 minutes	Desired change and constraints	Outcome, exclusions and delivery boundary
20–26 minutes	Approval and evidence	People, baseline, funding and sourcing route
26–30 minutes	Choose the next step	Deliverable, owner, date and reason to stop

Ask the question that fits the workstream

Managed service: “What can change: provider, scope, location, technology or only price?”

AI: “What task can the system complete, and who handles what it cannot?” Ask about knowledge, evaluation and operating ownership.

Platform build: “Who accepts the technical work, and who owns the business outcome after deployment?” They may be different people.

Revenue service: “Which accounts and actions would the outsourced team own, and how will incremental results be identified?”

Controlled casework: “Who sets policy and resolves disagreement when an analyst or system cannot decide?”

End with an explicit branch

Arrange a baseline review when missing evidence is obtainable. Bring a specialist when a specific dependency must be tested. Follow procurement when a formal route exists. Nurture a genuine future decision. Stop when the premise was wrong.

Do not promise a complete solution before the relevant specialists inspect the scope.

Give the receiving team a usable packet

Record workstream and region; the buyer's description; facts versus hypotheses; current model; workload and source; exclusions; systems; stakeholders; timing; procurement; risks; material unknowns; promised asset; and next decision.

Attach authorised notes or the relevant thread as appropriate. Recording is not automatically permissible. Apply consent, security and retention rules.

The receiving specialist should be able to answer: **Why this meeting? Why this work? What must be decided next?** If not, return the brief for clarification instead of booking another vague workshop.

A good handoff protects both sides from repeating the same discovery and paying for avoidable design work.

E / ECONOMICS, PROOF AND APPROVAL

30 Measure outcomes without double-counting

WORKING TOOL / Buyer Case

Agree definitions before pricing or launching a pilot. A platform metric is not automatically a contract outcome. Amazon Connect defines contact and timing measures at particular stages; check the actual source system instead of assuming universal denominators. [S10]

Measure	Definition to agree	Common distortion
Task completion	Eligible requests with a verified outcome ÷ eligible requests	A session ended, so it must be resolved
Durable automated completion	Automated completions with no counted same-issue recontact in a stated window	Later assisted work disappears
First-contact resolution	Defined issues resolved at first contact under a linkage and observation rule	Unrelated contacts or immature outcomes
Handling time	Agreed active, hold and after-contact components	Work moved to another team is omitted
Quality	Correct outcomes under an agreed rubric and sampling plan	Rubric changes after results
Service level	Contacts handled within the target under stated inclusions	Abandons, overflow or closed hours hidden
Cost per completed task	Defined total operating cost ÷ verified completions	Cheap sessions inflate the denominator

Keep three benefits separate

Workload released: fewer hours needed for the measured work. This may exist without lower staffing cost.

Capacity redeployed: those hours are assigned to useful work elsewhere. Document that work. Do not also claim the same hours as removed payroll.

Cash saving: a documented reduction in spend, such as avoidable overtime or an external invoice. Name the action, owner and date that turns capacity into cash.

Include failed automation attempts, knowledge maintenance, quality review, security, integration, run support and human fallback. Residual cases may be harder, increasing their handling time.

The bounded model in this kit

The buyer model covers requests that each previously required **one assisted contact**. Each eligible request gets one automation attempt. A failed attempt or counted recontact returns to one assisted contact. It does not model repeated retries, several later contacts or total enterprise demand.

Extend the model when those assumptions fail. Keep baseline and future cohorts comparable. Negative released hours mean more work, not zero saving. The model charges this added effort at the full entered hourly cost.

Action: get a data owner to approve each measure, cohort and observation window before using a calculated benefit in outreach or a proposal.

E / ECONOMICS, PROOF AND APPROVAL

31 Worked AI case: time saved is not cash saved

WORKING TOOL / Buyer Case

Fictional scenario. USD. Not a quote, benchmark or forecast. Each request previously needed one assisted contact. The model assumes at most one automation attempt and one later assisted contact.

Input	Assumption
Monthly baseline-assisted requests	120,000
Share eligible for automation	45%
Successful completion among attempts	65%
Same-issue recontact among completions	10%
Baseline handling time	8 minutes
Remaining assisted handling time	8.8 minutes
Loaded labour cost	$30/hour
Positive labour value becoming cash	50%
Technology cost per attempt	$0.18
Added monthly run/governance cost	$12,000
One-time implementation	$160,000

Calculate in the right order

Attempts: 120,000 × 45% = **54,000**.

Durable automated completions: 54,000 × 65% × 90% = **31,590**. This is not 54,000 contacts removed.

Remaining assisted contacts: 120,000 − 31,590 = **88,410**.

Hours released: (120,000 × 8 − 88,410 × 8.8) ÷ 60 = **3,033.2 hours** per month.

Theoretical labour value: 3,033.2 × $30 = **$90,996**. Only half is assumed cash-realisable: **$45,498**.

Added monthly cost: 54,000 × $0.18 + $12,000 = **$21,720**.

Net monthly cash benefit: $45,498 − $21,720 = **$23,778**.

Simple steady-state payback is about **6.7 months after steady state is reached**, before ramp effects and excluded costs. It is not launch-to-payback.

What can break the case

If no staffing, supplier or overtime spend changes, set cash realisation to zero. The model then shows a **$21,720 monthly cash cost**, even though capacity is released. That capacity needs a separate use case.

Harder residual work and later recontacts weaken savings. Several teams claiming the same avoided contact overstate them. The workbook includes downside and upside assumptions to expose these dependencies, not to forecast the future.

Ask the buyer to name each input's evidence owner and the actual spending change. A spreadsheet assumption is not a saving guarantee.

E / ECONOMICS, PROOF AND APPROVAL

32 Provider economics: protect the cash needed to deliver

WORKING TOOL / Contract Model

Buyer value and provider profitability are separate cases. Mobilisation, training, payment delays and scope changes can consume cash before an attractive contract pays.

A fictional 12-month managed service

USD. All figures invented. The full monthly fee is $180,000. Billing ramps to 50% in month one, 75% in month two and 100% thereafter. An accepted setup deliverable earns and invoices $120,000 in month one.

Direct labour, technology and other delivery costs total $147,000 monthly from the start. Mobilisation costs $200,000 and pursuit costs $60,000, paid in month one. All invoices are collected one month later. Opening cash is zero.

Result	Amount	Meaning
Year-one earned/invoiced revenue	$2,145,000	Not collected cash
Direct delivery plus mobilisation cost	$1,964,000	Includes ramp cost
Contribution before pursuit	$181,000	Before overhead and tax
Contribution after pursuit	$121,000	Positive, but not net profit
Peak cumulative funding gap	$407,000	Before receipts catch up
Cash unrecovered at month 12	$59,000	Final $180,000 invoice remains uncollected

Change qualification, not just the spreadsheet

Ask for the actual acceptance event, invoice basis, payment terms, payroll start, technology commitments, transition overlap and minimum volume. “Large annual contract” is not an answer.

The workbook changes fee, revenue ramp, cost ramp, setup revenue, mobilisation, pursuit and collection lag. It assumes full invoices are collected after an integer number of months, without tax, bad debt or deposits. Real contracts may need a finer model.

Reconcile AI with the contract model

If automation reduces billable seats, test the revised revenue before assuming the old margin survives. For outcome billing, define completions, retries, reopenings, exclusions and reconciliation. Separate software, implementation, service fees and pass-through charges.

Do not fund open-ended transition work. Consider paid design, earned mobilisation fees, deposits or staged milestones where appropriate. Prepayment improves liquidity; it does not automatically create earned revenue or profit.

Bid gate: finance approves contribution, funding and downside before a delivery commitment. Delivery approves the capability and start conditions. Neither a sales forecast nor a large TCV replaces those approvals.

E / ECONOMICS, PROOF AND APPROVAL

33 Pursuit economics and an honest enterprise funnel

WORKING TOOL / Pursuit Funnel

Use account measures for account access, opportunity measures for distinct buying decisions and contact measures for communication. Never mix populations to create an attractive conversion rate.

Research-cleared accounts → reached accounts → relevant conversations → booked meetings → held meetings → sales-accepted meetings → accepted opportunities → proposals → wins → collected cash.

One account can have several workstreams. Several meetings can support one opportunity. Preserve parent, buying entity and opportunity identifiers.

Measure	Calculation and condition
Account response	Accounts responding relevantly ÷ reached accounts in the same cohort
Attendance	Held meetings ÷ meetings due, excluding future meetings
Meeting acceptance	Accepted held meetings ÷ held meetings
Opportunity creation	Distinct accepted workstreams; link their supporting meetings
Win rate	Won ÷ decided opportunities in a comparable mature cohort
Cost per accepted opportunity	Defined acquisition cost ÷ accepted opportunities
Pursuit cost	Research, sellers, specialists, bid, legal, travel and tools

Price the next commitment

Expected incremental contribution = assumed win probability × contribution if won – remaining pursuit cost.

Contribution if won should exclude pursuit cost so it is not subtracted twice. Use remaining cost for the continue/stop decision; separately track total acquisition cost for final economics.

Fictional example: $400,000 contribution if won, a 25% win assumption and $40,000 remaining cost produce **$60,000 expected incremental contribution**. Break-even probability is 10%. Neither percentage estimates an actual deal without evidence.

Use a range. At 5%, the result is negative. Optimism cannot override eligibility, delivery or cash constraints. An expected positive value can still be unsuitable if the downside is unaffordable.

Report progress without pretending it is revenue

Track validated workstreams, buyer-agreed decisions, accepted opportunities, stalled reasons, specialist hours and review dates. Keep a first-touch cohort view separate from current-period activity.

Do not celebrate reply growth while proposal quality falls. Do not treat undecided enterprise opportunities after 90 days as a zero-win decided cohort. Do not call uncommitted pipeline earned revenue.

Action: keep the funnel and incremental pursuit decision in separate worksheet sections. A large historic campaign spend is neither a reason to continue nor a cost to subtract twice.

E / ECONOMICS, PROOF AND APPROVAL

34 Make a pilot a buying decision, not a demonstration

WORKING TOOL / Pilot Charter

A pilot is a bounded test of a decision. It needs a buyer, comparison, acceptance rule and route to stop. Do not launch one just to show what AI can do.

Charter field	What must be written
Decision	What will be approved, rejected or changed
Scope	One task, queue, segment, language or unit
Baseline	Current performance, source, dates and case-mix limits
Intervention	The particular process or technology change
Exposure	Eligible population, sample plan and observation window
Outcome	Verified result with numerator and denominator
Guardrails	Quality, harm, access, customer experience and cost limits
Comparison	Control, phased rollout or another justified method
Roles	Business approver, technical owner, risk owner and operator
Data	Approved information, access, retention and deletion
Stop path	Who can pause, restore or escalate
Commercial step	What happens when sufficient evidence exists

NIST's AI RMF is voluntary guidance, not a product certification. Treat evaluation and governance as work to perform, not a badge in a pitch. [S1]

Use hard gates, not one blended score

Productivity does not compensate for unauthorised action, unsafe outcomes or a data breach. Agree guardrails before exposure. A high “pilot score” must not hide a hard failure.

For AI, test identity, access, incorrect information, missing systems, policy exceptions, language, context transfer and escalation. For people-led operations, test training, calibration, routing and continuity.

Compare fairly

Do not put easy cases in treatment and difficult cases in the control. Record case mix, employee experience, channel and demand conditions. Allow the recontact or downstream outcome window to mature.

A small test may expose failures without proving average uplift. Label that limit. There is no universal minimum sample size: design depends on the decision, baseline, effect size, risk and acceptable uncertainty.

Close the test

Choose scale, extend within a new limit, revise or stop. Record the next evidence and spend required. Technical success without an operating owner or buying route is not a managed-service win.

Action: agree both the technical test and the buying decision before committing specialist time. Do not let a free pilot become an indefinite, unpaid production service.

E / ECONOMICS, PROOF AND APPROVAL

35 Bid or no-bid before writing the proposal

WORKING TOOL / Bid Gate

An RFI can be a genuine buying step, a market scan or a price check. Determine which without assuming bad intent. Do not spend weeks on a bespoke proposal before asking.

Hard question	Proceed only when
Are we allowed and eligible?	Sourcing route and mandatory conditions are understood
Can we deliver?	Geography, capacity, skills and access are viable
Is there an actual decision?	Scope, evaluation and accountable buyer are clear enough
Can we support the claims?	Proof and assurances are current and authorised
Can the economics work?	Contribution and funding survive downside
Can we accept the risk?	Legal, security, data and liability have an approved route

Unknown means clarify before related spending. An explicit hard failure means no-bid unless an authorised change resolves it. A score cannot create eligibility.

Ask through the permitted channel

What can change? What is mandatory? How will proposals be evaluated? Is a pilot allowed? What information is available equally? Which date is fixed? Which dependencies remain with the buyer? How will transition, data, subcontractors and exit be handled?

Do not request confidential competitor information or ask a sponsor to bypass procurement. Honour tender clarification and access rules.

Structure the proposal around the decision

Start with the workstream and outcome. State scope and exclusions, assumptions, alternatives, solution, transition, operating model, measures, responsibilities, price, billing units, risks, evidence and decision requested.

Separate committed work from optional expansion. Distinguish implementation, recurring service, usage and pass-through costs. Explain volume changes and the handling of failed or reopened transactions.

Avoid unlimited free consulting

Give enough detail to establish fit. Price deeper analysis when it needs substantial expert work and the buyer needs a reusable design. Agree ownership and permitted use.

A no-bid can preserve the relationship. Explain the requirement you cannot meet and the condition under which you could reconsider. Do not promise an unsafe or unprofitable scope merely to join a supplier list.

Action: the commercial owner records proceed, reduce scope, paid phase, hold or stop, together with a resource limit and review date.

E / ECONOMICS, PROOF AND APPROVAL

36 Data, outreach and production safeguards

WORKING TOOL / Sources

This is a review checklist, not legal advice or a complete account of any jurisdiction's law. Use qualified reviewers for the actual countries, channels, data and service. Public guidance was checked on 13 October 2026; recheck before launch.

Market or control	Point to verify
United Kingdom	ICO distinguishes corporate and individual subscribers. UK GDPR still applies to personal data used for B2B marketing. [S6]
United States	CAN-SPAM covers B2B commercial email: accurate identity and subject, required disclosures/ address and an effective opt-out. [S7]
Australia	ACMA requires consent, sender identity and unsubscribe. A purchased address is not proof of consent. [S8]
Other markets or channels	Obtain local review; calls, automated calls, email, SMS and social messages can differ
Infrastructure	Authentication and sending behaviour are separate from permission to contact. [S9]

Keep evidence of the approved outreach basis, source, notices, suppression and retention. Honour refusals across relevant systems and teams. Do not move channels to evade a stop request.

Separate sales research from production data

Use public, aggregate or synthetic information early. Customer recordings, health information, financial records, credentials and restricted architecture do not belong in prospecting tools or a public AI assistant.

Before access, agree purpose, minimum data, owners, location, retention, subcontractors and controls. In relevant US healthcare arrangements, review business-associate requirements with the buyer's privacy team. [S5]

Constrain AI actions

OWASP describes prompt injection as a risk from untrusted input changing model behaviour. A written instruction alone is not sufficient application protection. [S3]

Our proposed review includes restricted permissions, validated actions, separation of untrusted content from instructions, human approval for sensitive actions, logging and a stop mechanism. Have specialists validate the design.

Be precise about assurance

State which entity, service, site, system and dates an assurance covers. Do not imply that a logo, partnership or certification applies to every delivery location. Check scope before adding a claim to outreach.

No checklist here grants permission, certifies compliance or replaces buyer approval. A restriction is a hard boundary, not an objection to overcome with a better sales script.

F / MOBILISE, EXPAND AND IMPROVE

37 Qualify mobilisation before promising a start date

WORKING TOOL / Contract Model

An award is not a working service. Confirm the dependencies that determine readiness. A sales date without a transition plan passes risk to delivery.

Work package	Owner	Acceptance evidence
Knowledge transfer	Client process and delivery	Approved policy, sources, scripts and exceptions
People and skills	Workforce and delivery	Availability, language, skill, training and cover
Access/environment	Client IT and provider security	Approved identities, tested permissions and monitoring
Quality calibration	Client and provider quality	Shared rubric, review and escalation
Routing	Platform and operations	Test cases reach the right queue with context
Continuity	Incident and service owner	Fallback, contacts and tested recovery
Commercial operation	Finance/vendor management	Units, acceptance, invoices and disputes
Exit/change	Contract and service owners	Transfer, data and knowledge obligations

Average volume is not a staffing promise

Handling workload = contacts × handling minutes ÷ 60.

Indicative handling capacity per paid employee = paid hours × (1 – shrinkage) × planned handling occupancy.

Shrinkage means paid time unavailable for the modelled handling work, such as training or leave. Occupancy is the share of remaining available handling time spent on that work. Align definitions so time is not subtracted twice.

This is a capacity approximation, not a contact-centre schedule. Interval arrivals, service goals, concurrency, case mix, peaks, skills and absences require workforce planning. Do not use the arithmetic to promise a service level.

Model the ramp before the award

When do recruiting, payroll, technology and facilities begin relative to billing? Include parallel running, training and buyer approval delays. Test later approval, lower initial productivity and slower collection.

Avoid transferring unfamiliar high-risk work immediately before a peak without an approved and tested plan. Use a limited cutover where appropriate, with explicit stop and return conditions.

Sales owns an accurate handoff. Delivery owns readiness. Finance owns the approved funding plan. A calendar date cannot override an unresolved hard dependency.

Action: obtain the acceptance evidence for each work package before confirming the start. Record client-owned dependencies as clearly as provider commitments.

F / MOBILISE, EXPAND AND IMPROVE

38 Expand existing accounts without overselling

WORKING TOOL / Expansion Map

A live service is evidence and a responsibility, not a licence to sell the catalogue. Resolve serious service issues before asking for expansion.

Map region, business unit and journey. Mark current scope, healthy adjacent need, unconfirmed hypothesis, active opportunity, blocked or out of scope. Record the relationship owner and authorised source of insight.

Current work	Adjacent discussion	Evidence needed
Support queue	Knowledge or agent assist	Verified workflow friction
Platform implementation	Run support and improvement	Post-launch owner and continuing work
Renewal coverage	Another segment	Eligible cohort and no ownership conflict
Policy review	Another language/case type	Calibration, capacity and approved scope
AI evaluation	Ongoing monitoring	Model changes and funded responsibility
Billing support	Finance exception handoff	A documented cross-team loop

Make the service review useful

Show the agreed baseline, actual results, unresolved issues and one adjacent hypothesis. Ask whether that issue belongs on the buyer's agenda. Do not turn every operating review into a sales presentation.

“We see [permitted evidence] in the work we run. Does the adjacent team see the same issue, and would you be comfortable introducing us to compare it?”

Do not share information outside its approved purpose or across units without authority. Access to a record does not make it sales material.

Keep expansion accounting clean

An extension is not a new logo. A distinct workstream can be a new opportunity within an existing account. Separate retained revenue, price change, scope expansion and new customers.

Do not count the entire existing contract again when an amendment adds a queue. Forecast only incremental scope under the relevant stage.

Use a second qualification gate

A known client still needs a new scope, owner, price, delivery plan and control review when the work changes. Existing proof can ease the conversation; it does not validate every language, system or risk boundary.

Action: bring one verified adjacent problem to the account owner. Earn permission for a small decision before involving more service lines. Expansion should follow evidence, not the size of the provider's offering.

F / MOBILISE, EXPAND AND IMPROVE

39 Two fictional pursuits, from signal to next decision

WORKING TOOL / Discovery Map

Illustrative situations, not client stories. Both accounts are invented. The sequence shows what to verify and when to stop, not a promised conversion result.

Pursuit A: a retailer's post-purchase service

A retailer announces a new market and revised returns proposition. This supports an expansion question. It does not prove rising contacts, incumbent failure or outsourcing intent.

The account lead selects one country, language and refund-status journey. They record the announcement, date and question: “Who owns the handoff from refund portal to assisted support?”

First, check an authorised technology partner for a useful joint introduction. If unavailable, use an approved direct route to the operations owner. Do not contact six executives with identical messages.

The asset is a one-page automation boundary map. It covers authentication, the refund-status source of truth, permitted answers, human cases and evidence of completion. No customer records are needed.

Fictional buyer reply: “We have a bot already.” The next question is whether the task completes without repeat contact. If the buyer says it is solved and not under review, close the thread.

If a review is useful, invite the operations and digital journey owners. The call decides whether a baseline review is worthwhile. It does not promise bot replacement or headcount reduction.

Move to data review only after the buyer identifies a cohort, approved access and a findings owner. Use Buyer Case to test recontact, harder residual work, new costs and the specific spending change.

Expansion to another language waits for the first task's agreed quality and economics. A different refund policy or identity flow requires a new test.

Pursuit B: a software firm's renewal coverage

A software firm launches in another region and advertises customer-success roles. Hiring suggests a coverage question, not poor retention or intent to outsource.

The initial unit is a product family, region and customer tier. The hypothesis is an uncovered renewal queue. Check account ownership and partner agreements before contact.

Offer a coverage worksheet separating onboarding, adoption, renewal preparation, negotiation and expansion. Include account assignment, permitted contact, attribution, escalation and exclusions.

Fictional buyer reply: “Our internal team handles strategic accounts.” Agree. Ask whether a permitted non-strategic segment lacks clear coverage. If all segments are covered and no change is planned, do not invent a gap.

A useful meeting pairs the customer-success or revenue leader with revenue operations. It decides whether a scoped coverage pilot fits, not whether the provider can generate impressive appointment counts.

Define the eligible cohort, baseline, exclusions, discounts and credit for prior work. Do not count a renewal already secured internally as incremental provider performance.

Expansion requires accepted attribution and customer-experience evidence. A strong renewal pilot does not prove capability to run technical support, regulated advice or every sales channel.

The shared pattern: use a verified event, isolate one workstream, invite correction, agree a next decision and earn expansion through evidence.

F / MOBILISE, EXPAND AND IMPROVE

40 A 90-day plan that does not promise a 90-day sale

WORKING TOOL / Launch Board

This is an implementation sequence, not a sales-cycle forecast. Enterprise contracts can need longer approval, security and sourcing processes. Judge progress by reliable evidence and useful decisions, including a decision to stop.

Period	Work	Evidence before the next step
Days 1–10	Choose one play/vertical, scope and meeting rules. Check relationships.	Approved brief, real asset and owner
Days 11–25	Research a bounded cohort. Verify routes. Rehearse with sales.	Dated evidence, question and relevant owner
Days 26–45	Run the sequence, handle replies and review calls	Interest/rejection reasons, complete handoffs
Days 46–65	Repair the largest observed leak	One specific change and limited resource commitment
Days 66–90	Review matured evidence; continue, narrow or pause	Acceptance, costs, quality and next review

Give each role a decision

Commercial sponsor sets the outcome and loss limit. Account owner controls coverage and duplicates. Researcher records evidence and unknowns. Sales development owns approved contact, replies and scheduling.

Solution lead accepts technical discovery and limits unpaid expert time. Delivery confirms capability and mobilisation. Risk, legal and procurement approve within their authority. Finance validates contribution, cash and exposure.

One person may hold several roles. A shared inbox cannot hold accountability.

Five decisions each week

1. Which workstreams earned a buyer-agreed next step or were rejected?
2. Where does work wait: replies, scheduling, specialists, approval or buyer action?
3. Which assumption failed, and what is the smallest useful change?
4. Are cash, expert hours, client obligations or contact rules at risk?
5. What will each owner finish before the next review?

Keep background notes outside the meeting. Review recordings only through an approved consent and data-handling process.

Replies without interest may indicate a fit, message or offer problem. Held meetings without accepted work may indicate qualification or handoff failure. Opportunities without a buyer-owned next step may lack a real decision or route.

These are hypotheses. Check the actual conversations. The smallest conversion percentage is not automatically the constraint.

Scale one variable

Increase account volume, add a language, enter a vertical or add a play separately, only after permission, buyer value and receiving capacity pass review. Otherwise, the source of any change remains unclear.

G / REUSABLE TOOLS

41 The workstream brief and workbook directory

WORKING TOOL / Start

Copy this brief into the account record. Keep it short enough that sales and solution teams will read it. Link to evidence rather than filling the page with background.

> WORKSTREAM BRIEF
>
> Record ID / account owner:
> Parent / buying entity / region:
> Journey or process:
> Workstream and explicit exclusions:
>
> Observed event / source / date:
> What the evidence proves:
> What it does not prove:
> Question the buyer needs to answer:
>
> Operational owner / relationship:
> Economic or approval path: confirmed / unknown
> Current provider, platform or team: confirmed / unknown
> Value of the first conversation:
> Asset offered and ready to share:
>
> Contact route and approved basis:
> Suppression / duplicate / procurement checks:
> Meeting-gate status and unresolved items:
>
> Buyer-stated facts after discovery:
> Baseline / period / denominator / data owner:
> Next decision / owner / date:
> Specialist time required and limit:
> Reason to continue, hold or stop:

Workbook directory

Tab	Use it to produce
Start	A route through the tools and input legend
Campaign Brief	One campaign scope, budget and stop decision
Account Universe	Buying-unit and workstream records
Signal Register	Dated facts separated from hypotheses
Buying Group	Relationship ownership and decision rights
Meeting Gate	Ready, hold or stop from eight checks
Discovery Map	Buyer-confirmed facts and next decision
Play Library	Eight entry plays with assets and stop rules
Pilot Charter	Bounded test, baseline, acceptance and rollback
Buyer Case	Capacity, cash, costs and steady-state payback
Contract Model	Provider contribution, receipts and peak funding
Pursuit Funnel	Cohort progress and an incremental pursuit decision
Bid Gate	Hard constraints before proposal effort
Expansion Map	Current health and separately qualified scope
Launch Board	Owners, dependencies, evidence and reviews
Sources	Public context and application limits

Start without breaking the examples

Save a working copy. Financial sheets open with fictional assumptions to make the logic visible. Replace them and their source notes with approved inputs. Blank means unknown; zero means an entered zero. A zero denominator is undefined.

Formula cells calculate; they do not validate evidence. A score, badge or positive reply is not proof of budget or permission.

The web edition includes a brief builder, meeting gate, buyer case and pursuit calculator. It processes entries in the browser without submission or automatic storage. Save work before closing. Do not enter customer records, credentials or sensitive information.

The additional workstream templates give a blank, service-specific brief for each of the eight plays.

G / REUSABLE TOOLS

42 The final launch check and working glossary

WORKING TOOL / Launch Board

Before the first message, ask a colleague to inspect one pursuit from evidence to meeting. They should be able to explain why the buyer should care and what happens next. Repair that record before expanding the list.

Check	Pass condition
Unit	Entity, geography, journey and workstream are specific
Evidence	Source and date exist; inference is labelled
Asset	The promised map or worksheet actually exists
Message	Useful question, no invented pain or intent
Contact	Permission, identity, channel and suppression checked
Ownership	Relationship conflicts are resolved
Meeting	Purpose, participant and acceptance rules are clear
Economics	Buyer value and provider contribution stay separate
Capacity	Sales, solution and delivery can support the next step
Review	Owner, evidence milestone and stop decision scheduled

A strong resource removes one source of uncertainty. It does not need to promise a global transformation to be worth reading.

Terms that affect the decision

Workstream: a bounded operational process or problem with scope and an owner.

Buying entity: the organisation that can contract for the work. It may differ from the parent brand.

CX: customer experience across the journey, not just a contact-centre interaction.

BPO: contracted performance of a business process. It does not transfer every client responsibility.

Managed operations: ongoing responsibility for agreed work, measures and controls. The contract defines the boundary.

AI implementation: work required to put an AI-enabled process into an operating environment, including access, data, integration, evaluation and support.

RFI / RFP: a request for information or proposal. Neither proves a funded, winnable opportunity.

Accepted opportunity: a buyer-relevant workstream accepted by the commercial team against agreed rules. It is not every positive reply.

TCV: total contract value over a stated term. It is not current earned revenue, contribution or collected cash.

Contribution: revenue less the explicitly included costs. State whether delivery, mobilisation and pursuit are included. It is not net profit unless all relevant costs are included.

FTE: full-time equivalent capacity. A monthly average is not a service-level staffing plan.

Shrinkage: paid time unavailable for the handling work represented in the model, such as leave or training. Avoid double counting.

Occupancy: the share of available handling time used on measured workload. It is distinct from shrinkage, not a universal target.

Durable completion: a task completed under the agreed definition without counted same-issue recontact in the observation window.

Mobilisation: the work and spend needed to make a contract ready to deliver. Signing is not readiness.

The principle to keep

Make the first conversation small enough to accept and specific enough to matter.

Win permission to examine one workstream. Prove what changes. Protect the transition. Earn the right to expand.

REFERENCE NOTES

Public sources and evidence limits

Checked 13 October 2026. These references support technical and regulatory context, not promised commercial results. The campaign methods and scorecards are proposed operating tools. All numerical defaults are fictional. Recheck current requirements for the actual jurisdiction, contract and data.

S1 / NIST

AI Risk Management Framework
Voluntary risk-management context; not certification or a compliance guarantee.
https://www.nist.gov/itl/ai-risk-management-framework

S2 / NIST

Generative Artificial Intelligence Profile, NIST AI 600-1
July 2024 publication. Lifecycle, evaluation and third-party-component risk context.
https://nvlpubs.nist.gov/nistpubs/ai/NIST.AI.600-1.pdf

S3 / OWASP

LLM01:2025 Prompt Injection
Untrusted input and application-permission risk context.
https://genai.owasp.org/llmrisk/llm01-prompt-injection/

S4 / Financial Conduct Authority

Outsourcing and operational resilience
UK financial-services scope and retained accountability; check applicability.
https://www.fca.org.uk/firms/outsourcing-and-operational-resilience

S5 / US Department of Health and Human Services

Business Associates
Business-associate status and written safeguards involving protected health information.
https://www.hhs.gov/hipaa/for-professionals/privacy/guidance/business-associates/index.html

S6 / Information Commissioner's Office

Business-to-business marketing
UK corporate versus individual subscribers; personal-data requirements still matter.
https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/

S7 / US Federal Trade Commission

CAN-SPAM Act: A Compliance Guide for Business
US commercial email requirements; B2B email is not exempt.
https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

S8 / Australian Communications and Media Authority

Avoid sending spam
Australian consent, identification and unsubscribe requirements.
https://www.acma.gov.au/avoid-sending-spam

S9 / Google

Email sender guidelines
Technical sender requirements do not confer permission to market.
https://support.google.com/mail/answer/81126?hl=en

S10 / Amazon Web Services

Amazon Connect metric definitions
Platform-specific contact and timing definitions; verify actual denominators.
https://docs.aws.amazon.com/connect/latest/adminguide/metrics-definitions.html

S11 / Microsoft

Co-sell with Microsoft sales teams and partners overview
Partner collaboration and programme eligibility are distinct; do not imply funding.
https://learn.microsoft.com/en-us/partner-center/referrals/co-sell-overview