



DELTA ARC

DEMAND INTELLIGENCE

THE NEXT-ACTION WORKBOOK

Turn activity into an owned
commercial move.

The Next-Action Workbook

Turn activity into an owned commercial move

Delta Arc

Demand intelligence and connected operating systems

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The problem

Many systems can display activity. Fewer systems make the next decision obvious.

A useful operating view should answer:

1. What changed?
2. Why does it matter?
3. What evidence supports that interpretation?
4. What should happen next?
5. Who owns it?
6. When should the result be reviewed?

This workbook can be used with a CRM record, market opportunity, pricing decision, account plan, service issue, or operational exception.

1. Define the decision

Do not begin with the dashboard. Begin with the decision the team needs to make.

- Decision:
- Why it matters now:
- Deadline or trigger:
- Decision owner:
- People affected:
- Systems involved:
- Consequence of no action:

Decision test

- ☐ The question can be answered with an action, hold, escalation, or explicit request for evidence.
 - ☐ One person owns the decision even if several people contribute.
 - ☐ The decision has a review point.
 - ☐ Success can be observed without inventing a vanity metric.
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2. Record the change

Separate the new information from everything already known.

What changed?

When did it change?

Where was it observed?

Is this a new event, a corrected event, or newly visible history?

What did not change?

This distinction prevents a refreshed dashboard from being mistaken for a changed market or account.

3. Classify the evidence

Evidence item Source Date Direct or inferred Reliability Limitation

Evidence labels

- **Verified:** Directly established by an examined record, source, or observable result.
- **Strong inference:** Several consistent facts support the conclusion, but the outcome is not directly established.
- **Working lead:** Worth investigating, not yet reliable enough to drive an irreversible action.
- **Bounded absence:** Not found within a defined source, period, or search. It is not proof that the event never occurred.
- **User supplied:** Provided by a person and retained as such until independently verified.

Write the current evidence label:

Explain why:

4. Establish commercial relevance

A signal matters only if it changes fit, need, timing, access, risk, value, or the next action.

Dimension Current assessment Evidence Confidence

Fit

Need

Timing

Access

Economic value

Delivery ability

Risk

Relevance statement

Because **[observable change]**, the team should reconsider **[decision]** before **[time or trigger]**.

5. Select the next action

Choose one primary move.

- ☐ Contact the account or market participant
- ☐ Ask a specific qualification question
- ☐ Request missing evidence
- ☐ Route to a different owner
- ☐ Change timing or priority
- ☐ Change commercial terms
- ☐ Schedule a review
- ☐ Hold pending a defined condition
- ☐ Close the issue with a recorded reason
- ☐ Escalate a risk

The action

Why this action and not another?

What evidence would change the action?

6. Assign ownership

Role	Person or team	Deliverable	Due date
Decision owner			
Action owner			
Evidence provider			
Reviewer			

If everyone owns the next move, nobody owns it.

7. Define the handoff

Demand intelligence gets the team to the right door with context. Business intelligence carries the qualified opportunity through internal execution.

Outside-in context

- Market or account signal:
- Evidence of fit:
- Evidence of need:
- Timing:
- Access route:

Inside-out execution

- CRM record or operating object:
- Commercial owner:
- Required internal evidence:
- Next milestone:
- Decision rule:

Handoff completed when

8. Measure what changed

Do not measure only activity. Measure whether the action improved the decision or moved the work.

Outcome	Baseline	Expected change	Review date	Actual result
Time to decision				
Evidence completeness				
Ownership clarity				
Commercial movement				
Risk reduced				

Outcome classification

- ☐ Advanced
 - ☐ Correctly held
 - ☐ Re-routed
 - ☐ Closed with reason
 - ☐ Escalated
 - ☐ No meaningful change
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9. Learning loop

What prediction or assumption was tested?

What actually happened?

What reasoning should be retained?

What rule should be changed?

Where should that learning be available next time?

The operating system improves when outcomes update the reasoning, not merely the activity log.

One-page action record

- **Decision:**

- **Observed change:**
 - **Evidence label:**
 - **Commercial relevance:**
 - **Next action:**
 - **Owner:**
 - **Due date:**
 - **Review trigger:**
 - **Result:**
 - **Learning retained:**
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Continue the system

- [Delta Arc Demand Intelligence](#)
- [Delta Arc Business Intelligence](#)
- [Delta Arc CRM Intelligence](#)
- [Delta Arc Reports](#)
- [Build with Delta Arc](#)

This workbook is educational and operational guidance. It does not establish that any specific opportunity, outcome, or performance result exists. Apply it to verified information and the requirements of your organization.



DELTA ARC

DETECT THE CHANGE. DIRECT THE MOMENTUM.

Demand intelligence for the next
commercial move.

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