SERPIFAI COMPETITIVE DECISION TOOLKIT · FIELD GUIDE

How to Complete the Decision Definition Canvas

Define one governed decision object before competitor research begins, then carry that same object through the browser builder, workbook, evidence audit and executive handoff.

> **Beginner metaphor:** before comparing routes, pin the destination, name who is driving, mark the roads that are out of bounds, and decide what evidence would actually make you turn.

V1.0.2 · 20 August 2026 · Educational field guide · Fictional examples clearly labelled

Fast Action

Write the complete Decision Contract before collecting evidence

A Decision Definition Canvas is a one-page contract for the research job. It fixes what the evidence is allowed to change.

> **Decision ID [ID].** By **[decision date]**, **[decision owner]** will decide whether to **[specific action]** for **[buyer + material job]**, within **[offer / use-case boundary]** and **[market / geography / evidence window]**. Permitted alternative universe: **[alternative types]**. Explicit exclusions: **[exclusions]**. Material criteria: **[three to five criteria]**. Hard constraints: **[constraints]**. Evidence threshold: **[threshold + custom rule if used]**. Evidence may change **[actions]**. Reopen if **[material trigger]**.

If you cannot complete this object: the next task is definition, not competitor research.

One canonical object across every product surface

The article, browser builder, workbook, PDF and handoff may display the information differently, but they are not allowed to drop governed fields.

Identity

Decision ID · owner · decision date

Decision

Specific action under decision

Commercial scope

Buyer + material job · offer/use-case boundary · market/geography/evidence window · explicit exclusions

Choice architecture

Permitted alternative universe · 3-5 material criteria · hard constraints

Evidence governance

Evidence threshold · custom evidence rule when CUSTOM is selected

Decision consequence

Actions evidence may change · reopen trigger

State

READY TO RESEARCH · REPAIR CANVAS · STOP - RESEARCH NOT JUSTIFIED · next action

The eight blocks - and the failure each prevents

1 Owner + date

Who can authorize the action, and when must the choice be made?

2 Decision

What finite action can evidence change?

3 Buyer + job

Whose problem and buying situation define substitution?

4 Offer + market boundary

Which use case, segment, geography, channel and evidence window count?

5 Alternative universe

Which direct, adjacent, substitute/service, internal-build and status-quo routes are legitimate?

6 Criteria + constraints

What 3-5 material conditions can change the action, and what limits cannot be violated?

7 Evidence threshold

What proof rule must material claims meet?

8 Action + reopen

What may change after research, and what future event invalidates the frame?

Field-by-field completion guide

Field	Weak entry	Decision-grade entry	Test
Owner	Marketing team	VP Marketing; founder approval above agreed spend threshold.	Can one accountable person authorize the action?
Decision date	Q4	Decision required before 15 October planning lock.	Does the date govern the business choice?
Action	Understand competitors	Fund, defer or narrow a UK segment pilot.	Can evidence change a verb?
Buyer + job	SMBs	Operations leaders at 50-250 employee professional-services firms choosing a workflow system for multi-team intake and approval.	Would a different buyer/job create a different competitor set?
Offer boundary	Automation	Packaged intake, approval and audit workflow; integration-only tools remain adjacent unless they can own the outcome.	Can a reviewer tell what does not count?
Market boundary	Global B2B	UK mid-market direct-sales motion; current 2026 offer and buying conditions.	Are segment, geography and evidence window visible?
Alternatives	Top 10 vendors	Direct; adjacent; substitute/service; internal build; status quo.	Did the universe exist before vendor discovery?
Criteria	Features, price, brand	Buyer-job fit; implementation burden; security/ procurement fit; switching/exit; commercial model.	Can each criterion change the action?
Hard constraints	Must be affordable	Pilot must fit the planning-cycle deadline and existing identity architecture.	Can an attractive option still be excluded by a non-negotiable limit?
Evidence threshold	Reliable sources	Current attributable evidence for material claims; inference remains visibly labelled.	Is “good enough” operational?
Reopen trigger	Review later	Reopen on material buyer, offer, pricing, regulatory or architecture change.	Can the team tell when the canvas expires?

Define the alternative universe before naming competitors

Direct software

`DIRECT`

Same buyer, material job, buying stage and realistic replacement route.

Adjacent platform

`ADJACENT`

Overlaps part of the job or architecture without being like-for-like.

Service / substitute

`SUBSTITUTE / SERVICE`

Different delivery model that can fulfil the material outcome.

Internal build

`INTERNAL BUILD`

Spreadsheet, script, internal workflow or custom build that can absorb the job.

Status quo `STATUS QUO`

Delay, no purchase or incumbent process.

Strategic rule: the canvas defines which kinds of routes may enter research. READY requires at least two distinct governed alternative types. Later qualification determines which specific candidates belong.

Set 3-5 material criteria before seeing competitor evidence

1. Start from the buyer outcome.
2. Add adoption reality: implementation, security, procurement or organizational burden.
3. Add replacement reality: switching, exit or status-quo conditions.
4. Add commercial consequence: contract, cost or time-to-value.
5. Keep only criteria that could actually change the action.

Do not create false precision: weights belong only where a later method genuinely needs them and the decision owner can explain the trade-off.

Set the evidence threshold now; audit the evidence next

Attributable

A reviewer can identify where the claim came from.

Current enough

The source is recent enough for this decision.

Role-appropriate

A source supports only the kind of claim it can reasonably support.

State-labelled

Observed, inferred and unresolved states stay visibly different.

Conflict-preserving

Contradictions remain explicit rather than averaged away.

Ethically obtainable

Collection stays within legal, policy and professional boundaries.

Fictional completed Decision Contract

Decision ID DDC-FICTIONAL-001. By **2026-10-15**, **VP Marketing** will decide whether to **fund, defer or narrow a UK professional-services segment pilot** for **operations leaders at 50-250 employee professional-services firms choosing a workflow system for multi-team intake and approval**, within **packaged intake, approval and audit workflow; integration-only tooling is adjacent unless it can own the buyer outcome** and **UK mid-market direct-sales motion; current 2026 offer and buying conditions**. Permitted alternative universe: **DIRECT; ADJACENT; SUBSTITUTE / SERVICE; INTERNAL BUILD; STATUS QUO**. Explicit exclusions: **directories, marketplaces and generic integration tools unless evidence shows they can own the same buyer outcome**. Material criteria: **Buyer-job fit; Implementation burden; Security and procurement fit; Switching / exit burden; Commercial model**. Hard constraints: **pilot must fit the planning-cycle deadline and existing identity architecture**. Evidence threshold: **CURRENT ATTRIBUTABLE MIXED**. Evidence may change: **fund pilot / defer / narrow segment / change comparison set**. Reopen if **buyer segment, offer, pricing model, regulatory constraint or implementation architecture changes materially**.

Fictional learning example only; not a client result or market claim.

Criteria distinctness rule: the 3-5 material criteria must be distinct after trimming whitespace and normalizing case. Duplicating a criterion returns REPAIR CANVAS.

Six quality tests

1. **Same-answer test:** two reviewers identify the same decision and buyer/job.
2. **Alternative test:** genuine alternatives remain possible.
3. **Action-change test:** evidence can change what the owner will do.
4. **Boundary test:** offer, market and exclusions are clear enough to prevent drift.
5. **Evidence test:** the minimum proof rule exists before research.
6. **Reopen test:** a material future condition can invalidate the frame.

Fail closed: if the action is already fixed and new evidence cannot change it, STOP - RESEARCH NOT JUSTIFIED.

Governed output states

READY TO RESEARCH
Structure is complete, 3-5 canonical criteria match the detailed criterion records, quality tests are confirmed and the handoff may be shared if snapshot controls pass.

REPAIR CANVAS
Export a diagnostic draft if useful, but do not label it a completed Decision Contract handoff.

STOP - RESEARCH NOT JUSTIFIED
Export a refusal record if needed. Research is not authorized while the action is predetermined.

Portable handoff - exact canonical fields

Group	Required content
Identity	Decision ID · owner · date
Decision	Specific action under decision
Commercial scope	Buyer + material job · offer/use-case boundary · market/geography/evidence window · exclusions
Choice architecture	Alternative universe · 3-5 material criteria · hard constraints
Evidence governance	Evidence threshold · exact custom rule if CUSTOM
Decision consequence	Actions evidence may change · reopen trigger
State	READY / REPAIR / STOP · reasons · next action

Next governed step when READY: conduct the Evidence Audit against this frozen object.

Team completion protocol

1. The decision owner drafts first.
2. One researcher challenges ambiguity.
3. One implementation owner challenges feasibility.
4. Specialists bound their own domains without taking over the whole business decision.
5. Freeze the object before collection; material changes go to a change log.

Nine common mistakes

Topic instead of decision	Committee ownership	Audience without job
Vendor-first scoping	Criteria after evidence	Evidence by adjective
No-action omitted	No action can change	No reopen trigger

Research foundation and source limits

This field guide combines SERPIFAI's competitor-decision workflow with broader decision-framing, market-research and evidence-governance principles. These sources support individual principles; they do not certify this proprietary canvas or prove a commercial outcome.

Source	Role	Limit
HM Treasury - The Green Book (2026)	Objectives, constraints, broad options/ business-as-usual, documented reasoning and uncertainty.	Public-sector appraisal rules are not represented as governing private competitor analysis.
U.S. SBA - Market research and competitive analysis	Target market, location, demand and indirect/secondary competitor context.	The SBA does not define SERPIFAI roles or gates.
CEBMa - Evidence-Based Decision Making	Critical evaluation of multiple evidence sources.	Evidence informs; it does not mechanically dictate the business decision.
SCIP - Ethical Intelligence	Legal, transparent and honest CI practice.	Not legal advice and not an endorsement of SERPIFAI.

https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government/the-green-book-2026

https://www.sba.gov/business-guide/plan-your-business/market-research-competitive-analysis

https://cebma.org/resources/cebmas-e-textbook-evidence-based-decision-making-for-organizations-public-policy-and-practice/

https://www.scip.org/page/Ethical-Intelligence