SERPIFAI COMPETITIVE DECISION TOOLKIT - FIELD GUIDE

How to Write the Executive Decision Memo

Turn a frozen decision and governed evidence into an executive-ready handoff without changing scope, upgrading evidence, hiding the strongest alternative or manufacturing approval.

> **Beginner metaphor:** the memo is a boarding pass, not the aircraft. It tells the executive exactly which decision is ready to board, what evidence cleared the gate, what risk is still visible, and when the trip must be reconsidered.

V1.0.0 - 21 August 2026 - Educational field guide - Fictional examples clearly labelled

EXECUTIVE HANDOFF

One-page Executive Decision Memo

Decision request	What exact approval, rejection, selection, deferral or bounded authority is requested?
Recommendation	The preferred action and its boundary.
Why now	The real dependency, opportunity cost or consequence of deferral.
Material evidence	Two to four decision-bearing Evidence IDs, with exact evidence state and permitted wording.
Strongest alternative	The serious option that lost, why it lost, and what change could make it stronger.
Strongest challenge	The uncertainty, counter-case or assumption most likely to change the recommendation.
Execution	First action and accountable owner.
Review / reversal	The date, evidence change, threshold or condition that reopens, pauses or reverses the decision.

Authority rule: READY FOR EXECUTIVE REVIEW means the handoff is structurally ready to be decided. It never means approved.

The canonical handoff

Identity

Memo ID, Decision ID, decision owner, executive recipient/reviewer and as-of date.

Decision

Exact decision request, recommendation, why now and authority boundary.

Evidence

Evidence IDs, exact A62 state, exact permitted wording and supporting-analysis location.

Trade-off

Strongest serious alternative and the reason it lost under the frozen criteria.

Challenge

Strongest counter-case, material uncertainty or critical assumption.

Execution

First action, owner, review/reopen trigger and reversal/stop condition.

What the memo may consume

Upstream object	Required state	Permitted use	Do not
Decision Definition Canvas	FROZEN DECISION CONTRACT	Copy Decision ID, owner, action boundary and reopen trigger.	Change buyer, offer, scope or authority to make the memo cleaner.
Evidence Audit	DECISION-USABLE or BOUNDED INFERENCE	Use the few records that change the call and preserve permitted wording.	Use REPAIR / NARROW or HOLD / EXCLUDE as support.
Alternative comparison	Same Decision ID and serious option	State why the strongest alternative lost.	Invent a weak alternative after choosing the recommendation.
Execution boundary	Named owner and review/reopen condition	Connect approval to one bounded action.	Treat the memo as open-ended authority.

Recommendation, request and actual decision are different

Recommendation

The analyst's bounded judgment about the preferred action. It does not authorize anything.

Decision request

The exact authority being requested from the executive.

Actual decision

What the authorized decision-maker later approves, rejects, modifies or defers. Record this separately.

Do not pre-fill approval. A memo can be perfectly ready for review and still be rejected or modified.

Evidence compression without evidence laundering

A memo should usually contain fewer facts than the research archive. Selection is allowed; silent strengthening is not.

Evidence Audit state	Memo use	Required treatment
DECISION-USABLE	May support the recommendation.	Keep exact permitted wording and material limitation where relevant.
BOUNDED INFERENCE	May support a bounded recommendation.	Keep the inference label and limitation visible.
REPAIR / NARROW	Not decision support yet.	Return to Evidence Audit.
HOLD / EXCLUDE	Must not support the recommendation.	Exclude or repair upstream.

One serious alternative is more useful than three straw men

> **Trade-off rule:** name the strongest credible alternative, the criterion or constraint that made it lose, and what future change would make it stronger.

The objective is not to prove that the recommendation is obviously right. It is to let the executive challenge the real choice.

Put the strongest challenge on the executive surface

If a fact, assumption or uncertainty could materially change the recommendation, the executive should not discover it in an appendix after approval.

Good challenge

"No first-party conversion history exists for the exact territory."

Weak caveat

"Results may vary and market conditions can change."

A useful challenge connects directly to a review or reversal condition.

Four governed readiness states

READY FOR EXECUTIVE REVIEW

The decision remains frozen, evidence is usable/bounded, the serious alternative and challenge are visible, and execution/reopen language is complete.

REPAIR MEMO

The upstream objects may be valid, but the handoff itself is incomplete or internally inconsistent.

RETURN TO EVIDENCE AUDIT

The recommendation depends on evidence that is REPAIR / NARROW, HOLD / EXCLUDE or otherwise not permitted for decision use.

RETURN TO DECISION DEFINITION

A frozen decision boundary is no longer current. Reopen the Decision Definition Canvas before rewriting the memo.

Fictional worked memo

Decision request: Approve a six-week integration-territory pilot and its named owner; do not approve the full programme yet.

Recommendation: Approve the bounded pilot.

Why now: The current planning window allows one reversible test before the next budget commitment.

Evidence: Use only the exact audited permitted wording; do not translate sampled visibility or sales mentions into market leadership.

Alternative: Build the broad category hub first. Defer because it requires more authority and content capacity before first-party buyer evidence is available.

Strongest challenge: No first-party conversion history exists for the exact territory.

Execution: Growth lead launches the first buyer-comparison asset and evidence test.

Reopen: Reconsider if the pilot misses the agreed threshold, the implementation dependency changes, or new audited evidence materially strengthens the alternative.

Fictional example only. It does not claim an observed client result.

What belongs on the page, behind it, and outside it

On the executive surface	Behind the page	Keep out
Decision request and recommendation	Full research archive	Unattributed claims
Two to four decision-bearing evidence items	Source passages and audit history	Vanity metrics that do not change the call
Strongest alternative and challenge	Detailed option scoring or calculations	Straw-man alternatives
Owner, first action and reopen/reversal condition	Implementation plan and task register	Open-ended authority not actually approved

Good memo vs weak memo

Weak	Better
Background before the decision	Decision request first
Every metric included	Only decision-bearing evidence
Recommendation without authority request	Exact bounded ask
Inference rewritten as fact	Evidence state preserved
Alternative theatre	Strongest serious alternative
Generic risk caveat	Strongest challenge connected to reopen condition
No owner	First action and accountable owner
No review rule	Explicit review/reversal trigger

Frozen handoff and post-review decision record

The Excel HANDOFF stores frozen values separately from current source formulas. If the live memo changes after freeze, integrity becomes DRIFTED and Share state becomes NOT READY.

Before review

Freeze Memo ID, Decision ID, memo fields, readiness state, Snapshot ID and date.

During review

The executive approves, rejects, modifies or requests more evidence. Silence is not approval.

After review

Record the actual decision separately with decision-maker, date, conditions and authority granted.

If facts change

Create a new version or reopen the upstream object. Do not overwrite historical rationale.

Research base and limits

Source	Transferable principle	Limit
HM Treasury Green Book (2026)	Options, preferred option, risk/uncertainty, evidence, monitoring and evaluation.	Public-sector appraisal guidance; not a certification of this private toolkit method.
HM Treasury business-case guidance (2026)	Preferred way forward, options, deliverability, governance and management case.	Does not define the SERPIFAI handoff states.
HM Treasury Magenta Book (2026)	Monitoring/evaluation and learning should be designed into implementation.	Evaluation guidance, not an executive memo template.
Center for Evidence-Based Management	Critical appraisal and evidence-based management principles.	Does not certify a particular recommendation.

Method limit: the memo improves traceability and challengeability. It does not make the recommendation correct, replace professional judgment, or create approval authority.