SERPIFAI FIELD GUIDE

Competitive Decision Brief Human Handover, Review & Release Guide

A portable operating guide for turning competitive evidence into an accountable choice without hiding uncertainty, dissent, execution dependencies, approval state or the conditions for changing course.

Human rule: a decision brief is a handover, not a brochure. If the original analyst is unavailable tomorrow, another executive should still be able to reconstruct what was decided, what was weak, what alternative lost, who acts next, whether approval really happened and what would make the team turn back.

Canonical method

DEFINE	ASSEMBLE	CHALLENGE	DECIDE	COMMIT	RELEASE
Lock the choice	Trace claims + options	Preserve dissent	Bound recommendation	Make action executable	Record review + reversal

Use this guide when a founder, executive, finance owner or cross-functional team needs to make, refuse, stage or later reopen a consequential competitive decision.

Do not use it as proof that review occurred, a client case study, a universal score, or a replacement for the deeper evidence register.

Research reviewed 17 August 2026 - illustrative worked example only.

1. Start with one human decision

Picture the meeting: five minutes before a budget call, someone says, “These marketplace domains keep appearing above us - should we build a content programme to beat them?” The dangerous jump is from an observation to a spend decision. The brief slows that jump just enough to make the choice explicit.

Field	Plain-language question	Release test
Decision	What exact choice must be made?	Can the sentence end in yes, no, defer, narrow or another explicit disposition?
Scope	Which buyer, offer, market, geography and time horizon?	Are boundaries visible before evidence is interpreted?
Decider	Who can make the final call?	Is one accountable decision owner named?
Evidence threshold	What must be known before the choice is safe enough?	Does the burden match the cost of being wrong?
Review trigger	What new fact would reopen this?	Is the trigger observable and dated?

Decision sentence example

“Should we fund a four-week evidence tranche to validate whether two marketplace domains materially change our B2B competitor set before the Q4 budget decision?”

Beginner check: if the decision sentence cannot fit in roughly two lines without losing its meaning, the scope is probably still doing too many jobs.

2. The nine-part anatomy

Component	What it must preserve	Human failure if absent
Decision mandate	Choice, deadline, decision owner	The team keeps discussing a topic instead of deciding.
Scope + exclusions	Buyer, offer, market, geography, time	Evidence leaks into a different decision.
Evidence register	Claim, source, date, state, limitation	The recommendation cannot be reconstructed.
Option set	Serious alternatives + no action	The preferred answer becomes the only answer.
Challenge record	Strongest counterargument + disposition	Review becomes ceremonial.
Recommendation	Bounded choice + limits	Confidence outruns evidence.
Execution gate	Owner, dependency, acceptance condition	Approval never becomes accountable action.
Release record	Version, approval state, reviewer, archive	“Reviewed” becomes branding.
Reversal loop	Review date + observable trigger	A temporary assumption becomes permanent.

Compression law

A one-page brief may compress prose. It may not delete material uncertainty, dissent, ownership, conditions or the option that lost.

3. Evidence, alternatives and dissent

The strongest brief is not the one with the most sources. It is the one where the decision-critical claims have the right evidence for the consequence of being wrong.

Evidence state	Meaning	Permitted use
OBSERVED	Directly shown in the governed scope	Bounded factual statement
INFERRED	Interpretation from observations	Labelled interpretation
ASSUMED	Temporary planning premise	Reversible test or scenario
CONTRADICTORY	Material records disagree	Challenge, segment or gather resolving evidence
UNRESOLVED	A material claim cannot yet be justified	Visible limitation; not support

Options must be real records

A state such as SELECTED or NO ACTION is not enough by itself. The option needs substantive content: what it is, evidence for and against it, exposure, reversibility, dependencies, why it was selected/rejected, and who owns it.

Challenge slot

Record the strongest material reason the recommendation may be wrong, its evidence, reviewer, disposition and reopening trigger. A resolved label with no evidence locator is not a resolved challenge.

4. Decision rights and release-state law

DACI and RAPID help clarify who drives, approves, recommends, decides, contributes/input and performs. Use that role clarity inside the brief, but keep it separate from evidence quality and review provenance.

Method	Useful role insight	Boundary in a competitive brief
DACI	Driver, Approver, Contributors, Informed	Role clarity does not prove claim quality, dissent completeness or approval provenance.
RAPID	Recommend, Agree, Perform, Input, Decide	Role assignment does not create a versioned evidence/release record.
Decision brief	Decider, reviewer, execution owner, evidence custodian	Connect roles to claims, options, challenge, action, approval and reversal.

Release-state law

Approval state	Release meaning	Public review label?
DRAFT	Not ready for review	NO
READY FOR REVIEW	Record may be handed to the reviewer; not approved	NO
CHANGES REQUIRED	Material work remains	NO
APPROVED	Exact version has an approval record	YES, if the release record is complete
APPROVED WITH CONDITIONS	Exact version is approved only with the written condition	YES only when the condition is actually recorded

Fail-closed rule: an unsupported status, a missing conditional-approval condition, or an incomplete release record must block release rather than silently become READY.

5. Make approval executable - and proportionate

Execution control	Why it matters
Owner + first action	Turns approval into a named next move.
Due date + tranche boundary	Limits open-ended commitment.
Dependency	Shows what must be true before work can start.
Acceptance condition	Defines what counts as a completed first tranche.
Controlled status	READY / BLOCKED / NOT REQUIRED; unsupported values fail closed.
Blocker or not-required reason	Prevents a label from hiding why execution cannot proceed.

Evidence proportionality

Increase evidence depth, independent challenge and release rigor as the decision becomes more expensive, irreversible, uncertain or externally consequential. A small reversible test can tolerate more uncertainty than a large annual commitment.

Market-method boundary

Klue-style battlecards, Crayon-style executive CI, Contify-style intelligence workflows, and decision-rights tools such as DACI/RAPID each solve useful parts of the workflow. The brief adds the last-mile join: claim evidence + serious options + challenge + execution + exact approval/release + reversal.

6. Worked example - from messy evidence to bounded action

Illustrative scenario: two marketplace domains repeatedly appear in search, while the sales team rarely recognizes them as buying alternatives. The team is tempted to fund a large content programme.

Record	State	Decision consequence
Search recurrence	OBSERVED	The marketplaces compete for some search attention.
Sales/customer recognition	CONTRADICTORY	Direct buying substitution is not established.
Marketplace role	INFERRED	They may function as discovery/reference sources.
Business-competitor conclusion	UNRESOLVED	Do not claim direct competition yet.
Selected option	Fund a four-week validation tranche	Keep commitment small and reversible.
No-action option	Take no action	Retain as the baseline comparator, not a straw man.

Challenge

High search visibility may be a source-role effect rather than evidence of direct commercial substitution.

Human handover

If the original analyst is away when the founder reopens the record, the brief should still show why the small tranche won, what evidence was contradictory, what no action meant, who gathers the next evidence and which buyer signal would stop the strategy.

7. Release checklist and portable handoff

Before release, another reviewer should be able to reconstruct both the recommendation and the reasons it might be wrong.

Release check	Pass condition
Decision + scope	One bounded choice, decider, date and exclusions are visible.
Critical claims	Every decision-critical claim has state, source, limitation and permitted use.
Options	Exactly one substantive selected option; a substantive no-action option is preserved.
Challenge	Every recorded challenge is complete, non-open and dispositioned.
Execution	Only valid READY or explained NOT REQUIRED can pass the gate.
Approval	Unsupported approval tokens fail; conditional approval includes the actual condition.
Reversal	Review/expiry date and observable trigger are explicit.
Archive	Decision log ID, exact version, evidence location and correction path are recoverable.

Portable decision note

Decision: [bounded choice]
Evidence: [decision-critical support]
Challenge: [strongest dissent]
Alternative: [no-action/rejected path]
Action: [owner + first step]
Approval: [exact state + reviewer + condition if any]
Review: [date + reversal trigger]
Archive: [decision/evidence locator]

Sources used as design context: UK Government AQuA Book; HM Treasury Green Book 2026; Atlassian DACI; Bain RAPID; current Klue, Crayon and Contify materials. These sources do not certify SERPIFAI or prove client outcomes.