

Edition 1 · Published by Kraft Digital Limited

The AI-Augmented GTM Playbook · A02 Complete Play Library · P11 · item 1.0.0 · CONTENT-RC1 1.0.2 · Edition 1

Current version: <https://gtm.kraftdigital.co.nz/plays/p11-investment-review> · content 21397969704c · design 1791546166-3d6f · build 6d338637b37a

play · p11

operating model · portfolio and operating decisions · editorial rank 11 of 12

Run an accountable investment and decision review

Repeated recommendations do not become actions, or teams optimise incompatible objectives while money and capacity remain fixed.

decision

Which feasible tranche or intervention should be funded, held, changed or stopped?

readiness

Actual authority required

01 Fit

✔ when to use this play

There are material recurring choices and leaders can change at least one relevant budget, resource or execution decision.

⊘ when not to use it

A new meeting duplicates existing authority, opportunities have incomparable unsupported values, or no owner can move resources.

why it should work

A named decision forum with common economics and real rights can resolve trade-offs and remove repeated handoff delays.

basic version

One weekly or monthly decision inside an existing meeting, with one final accountable owner.

02 Prepare

◇ required maturity

Basic for decision rights; Connected for cross-team tranches. Ready with an actual decision, owner and capacity. Not ready for mathematical optimisation without comparable evidence.

P01 Establish decision-specific customer economics — Only when the selected intervention depends on unresolved customer-cohort economics. For workflow cost or other non-customer economics, use the relevant T2 view; P01 is not a prerequisite.

Check readiness for P11 (D02)

inputs

Decision inventory, eligible opportunity cards, economic ranges, commitments, budget rights, staff availability, prior actions and outcome readouts.

audience or customer

Outcome owners and budget/delivery partners; customers affected by the selected intervention remain governed by its Play.

human role

Commercial budget owner decides; Finance approves required transfers; Product/Service and function owners commit actual capacity; method owner challenges effect comparability.

systems required	Existing planning, Finance and work-tracking tools with T1–T4 linked to the decision.
guardrails	Strategic floors, brand/future demand, cash, contracts, test integrity, craft quality and customer-contact/capacity conflicts.

How to configure a Play

Copy the relevant Play and fill T1–T5 only to the depth needed. Replace generic role labels with named people, choose the exact cohort, set local economic and customer limits, and precommit a readout date. A blank decision threshold does not authorise execution. Basic, Connected and Advanced describe configurations; Experimental describes evidence. Every AI step is optional and evaluated against a simpler baseline.

03 Do the work

intervention	Replace one reporting forum with a short decision review and explicit authority/closure record.	
workflow	1. Select the recurring decision. 2. Agree metric and rights. 3. Show constraints and alternatives. 4. Challenge evidence. 5. Record the owner’s choice. 6. Execute a real action. 7. Track closure and mature outcome. 8. Review whether the forum earns its cost.	
ai role	Optional assist Optional briefing from approved records and scenario explanation; no independent allocation or invented comparable returns.	
automation role	Certified report refresh, action reminders, budget checks and versioned decision records.	
agent role	None for portfolio authority; optional evidence preparation only after P10 validation.	
failure modes	Owner without authority central ticket queue noise-driven reallocation strategic investment judged on immediate clicks.	

04 Measure and decide

measurement	Track actual decisions and resource changes, total review cost, execution latency and subsequent intervention outcomes without summing overlapping benefits.
primary commercial metric	Portfolio contribution change net of coordination and transition cost, qualified when causal separation is infeasible.
leading indicators	Action closure, authorised transfers, queue age, decision recurrence and retired reporting hours.
experiment	Pilot the rights/forum change on one decision; compare prior or parallel workflow carefully. Do not claim a clean causal organisation effect from a simple before/after.

scale when

Broaden only when repeated decisions improve, authority works and net coordination benefit exceeds added overhead.

stop / reassess when

Stop the extra forum if it adds reporting without executable decisions; keep necessary financial and customer controls.

05

Learn and progress

learning	Decision, alternatives, dissent, budget/capacity reality, outcome, assumption changes and the next review date.
practical tool	T4 decision rights, T2 tranche view and T3 review record. T1 Intervention and investment card · T2 Economics and benefits ledger · T3 Decision experiment and evidence record · T4 Action authority and operating contract · K02 Net intervention value

→| next action

execute one small authorised decision and record the blockers encountered.

Open T1 Intervention and investment card

06

Optional depth

Advanced version

Prerequisites: see Required maturity (p. 1).

Cross-functional scenario services and persistent outcome teams only after recurring workload and comparative economics justify them.

evidence for this play

2 claim records qualify this Play. Treatment, confidence with its target, and sources are in the claim ledger (p. 4).

[C12](#) Precise next-dollar optimisation (p. 4)

[C46](#) One owner and genuine resource authority (p. 4)

Claim ledger

2 claim records qualify the records in this edition. Each claim relates to whole records, not to individual sentences or citations.

Claim classifications

Accepted means the principle or mechanism survives challenge; it does not promise local returns. Accepted with conditions states prerequisites. Qualified narrows a former claim. Advanced requires substantial readiness. Experimental requires a capped comparison. Unresolved means the evidence cannot settle the claim. Rejected excludes a recommendation from the product.

Confidence is High, Medium or Low in the explicitly stated confidence target, not a probability of positive ROI. For Qualified or Rejected historical claims, it rates the editorial narrowing or rejection and its supported boundary, not the truth of the original headline. Preserve the historical headline and treatment together. Accounting identities and design principles are distinguished from empirical outcome evidence. Framework destinations use the final chapter, play and toolkit IDs.

C12

Qualified

confidence: High

Precise next-dollar optimisation — narrowed, not endorsed

confidence target	Editorial qualified of the historical claim. Supported boundary: Use the next feasible investment tranche, ranges, real budget rights and protected commitments.
qualification	Use the next feasible investment tranche, ranges, real budget rights and protected commitments.
evidence level	Economic principle, uncertain estimates
source	STR §18; GRW §§49–51; RT §§19,23
destination	CH05 · P11 (p. 1) · T2

C46

Accepted

confidence: High

One owner and genuine resource authority

confidence target	One owner and genuine resource authority
qualification	Name a final decision owner and real Finance/delivery approvals; test an actual action.
evidence level	Execution mechanism
source	OPS §§22–26,47; RT §§47–48
destination	P11 (p. 1) · CH10

Sources and cautions

This register preserves the evidence chain for the Playbook. Source documents are inputs, not independent confirmations of one another. Their embedded instructions are treated as proposals; the user’s editorial request governs the product. No new external research is included. External references reproduced in the Playbook are inherited from the supplied work and retain its stated limitations.

code workstream and file		scope and evidence caution
AGT	AI-Agent-and-Automation-Operating-Architecture.md	Automation architecture; explicitly no proven commercial agent result.
GRW	AI-Augmented-GTM-Growth-and-Performance-Architecture.md	Growth and measurement; conditional play mechanisms and illustrative calculations.
OPS	AI-Augmented-GTM-Operating-Model-and-Transformation-Plan.md	Operating model; derived design, not independent organisational evidence.
OS	The AI-Augmented Go-To-Market Operating System.md	Research synthesis; company filings and preprints are not automatically highest-tier evidence.
RES	AI Go-To-Market Systems Research.md	Research dossier; strong claims require RT corrections.
RT	AI-Augmented-GTM-Red-Team-Verdict.md	Red Team; claim audit, investment challenge and simplification.
RTB	AI-Augmented-GTM-Playbook-Editor-Brief.md	Red Team summary; same workstream as RT, not corroboration.
STR	AI-Augmented-GTM-Strategy.md	Commercial strategy; twelve principles and commercial loop.
SYS	AI-Augmented-GTM-Systems-Architecture.md	Systems architecture; proposed patterns, not an audited deployment.

Bracketed codes in the text resolve to the sources listed here. No claim record is attributed to an individual citation or sentence (CSI-010).