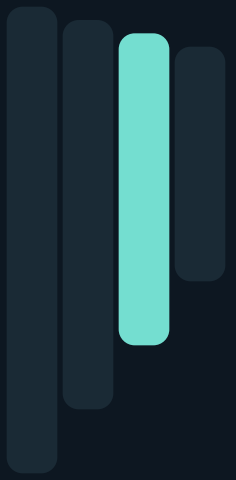
PRODUCT MANAGEMENT / INDEPENDENT PORTFOLIO

ACCOUNT INTELLIGENCE

Evidence before forecast.



A B2B product requirements and decision-system case study: turning uneven account records into defensible commercial actions.

PRD / EVIDENCE MODEL / PRODUCT DECISIONS

The account review is a decision problem

A commercial manager needs to know what is defensible, who can change the outcome, and what needs attention now.

Information is fragmented

Accounts, opportunities, stakeholder names, facts, paperwork and deadlines arrive as uneven records.

Forecast can overstate certainty

A large worth_up_to value is potential pipeline, not automatically financially substantiated business.

Time is constrained

Account managers must identify blockers, missing proof and actionable next steps quickly.

PRODUCT JOB TO BE DONE

“When reviewing a portfolio, show me what can be defended, why, and what to do next.”

SOURCE: ayushxt25/flytbase-account-intelligence README (Nov 2026)

A Monday portfolio review, not another contact list

Primary workflow is an enterprise account manager reviewing several commercial accounts; other roles are potential extensions.

Primary user — Account manager

Needs a cross-account summary, evidence-backed value, stakeholder access, blocker history, and ordered next actions.

Secondary stakeholder — Reviewer / leader

Needs traceable explanations before treating opportunity value or readiness as reliable. Proposed audience, not verified users.

SUCCESS CRITERION

Every commercial claim should be inspectable back to source records, or explicitly marked unsupported.

Five questions, one product surface

Scope is intentionally narrower than a CRM suite: aggregation, evidence and decision support rather than sales automation.

01	**WHAT IS IT WORTH?**	Potential pipeline vs. substantiated book
02	**WHO MATTERS?**	Stakeholder roles, access and relationships
03	**WHAT NEXT?**	Ranked actions from blockers and evidence gaps
04	**WHAT IS AT RISK?**	Open blockers, deadlines and dependencies
05	**WHAT IS MISSING?**	Unknown, unverified and unsupported claims

Potential value is not substantiated value

A verified operational fact alone cannot validate the monetary amount attached to an opportunity.

01

Raw claim

worth_up_to represents potential

02

Source linkage

Opportunity references fact IDs

03

Evidence test

Verified fact states same amount

04

Book decision

Include only substantiated value

DOCUMENTED 14 NOV 2026 DEVELOPMENT SNAPSHOT — DATA-DEPENDENT, NOT LIVE KPIs

$3.8M

Potential pipeline

$0

Substantiated book

4 accounts / 13 opportunities

9 active blockers / 26 evidence gaps

Readiness is a classified state, not a score

Deterministic outputs prevent absence of evidence from being interpreted as a positive signal.

STATE	INTERPRETATION	DECISION / NEXT STEP
BLOCKED	Documented unresolved blocker	Resolve the blocker and inspect source
EVIDENCE INCOMPLETE	Required support is missing or weak	Seek linked verification or paperwork
READY FOR REVIEW	No recorded blocker; evidence supports review	Human review; not a win prediction
UNKNOWN	Insufficient structured input	Surface gaps without inferring readiness

No win probability, autonomous negotiation, or unverified approval state is implied.

From account portfolio to defensible action

Illustrative journey distilled from implemented views and documented state; not a user-tested journey.

01

Mission Control

Scan accounts, blockers, gaps

02

Account drilldown

Inspect opportunities, stakeholders

03

Evidence inspector

Examine raw record and fact status

04

Next action

Resolve blocker or request proof

DESIGN PRINCIPLE

Keep source, interpretation, and commercial decision separate—even when all three appear on one screen.

What we refused to automate

Tradeoffs make the product credible: useful decisions without inventing certainty or violating the data contract.

DECISION	CHOSEN APPROACH	REJECTED / DEFERRED
Valuation	Amount-matched verified facts	Treat all stated pipeline as booked
Prioritization	Deterministic ranking	Opaque ML win-probability claims
Upstream data	65s atomic cooldown + cache	Unbounded direct browser calls
Dynamic accounts	whoami discovery + queued import	Hardcode released accounts
Mutation	Secret-gated note write-back	Open anonymous changes

Prove decision quality before productivity uplift

These are proposed evaluation metrics; the repository does not demonstrate production customer outcomes.

Decision accuracy

% of displayed supported amounts traceable to qualifying source evidence.

Time to understanding

Time to identify top blocker and source for a sampled account.

Action usefulness

Reviewer judgment of relevance and clarity of next actions.

GUARDRAILS

Unsupported financial claims • stale sync visibility • duplicate events • unauthorized writes • false deadline alarms.

What exists, what remains to be proved

Challenge-built prototype: product logic is documented; actual enterprise adoption and business impact are not.

Implemented and documented

Next.js + Redis + server-only MCP; evidence inspector; deterministic readiness; risk and gaps; guarded note write-back; cached state.

Not established

No customer deployment, causal pipeline uplift, independent claim verification, win-probability model, broad team RBAC or committed automated test suite.

SOURCE OF TRUTH

github.com/ayushxt25/flytbase-account-intelligence | README and original application screenshots

Portfolio title: Account Intelligence. Created in the FlytBase Questathon 2026 context; no claim of official customer deployment.