

Attribution Trust Triage Worksheet

Domain Methods

How to use this worksheet

- Use this in the next reporting, budget, or RevOps triage session.
- Start with one disputed revenue or attribution story, not every possible edge case.
- For each layer below, mark the current state, confidence band, owner, and next fix.
- Confidence bands: Directional = useful trend, not budget-safe. Decision-safe = good enough for spend or pipeline decisions.
- If three or more layers score red, stop debating models and fix the operating system first.

1. Tracking layer

- Question: Can we follow the journey from click or visit into the CRM reliably enough to learn anything useful?
- Check for: broken UTMs, redirect gaps, cross-domain loss, missing form capture, inconsistent channel naming.
- Current state: Green / Yellow / Red
- Confidence band: Directional / Decision-safe
- Owner: _____
- Next fix: _____

2. Definition layer

- Question: Do marketing, RevOps, sales, and finance mean the same thing when they say pipeline, opportunity, and revenue?
- Check for: pipeline-stage drift, different booking dates, free-text lifecycle overrides, finance reconciliation gaps.
- Current state: Green / Yellow / Red
- Confidence band: Directional / Decision-safe
- Owner: _____
- Next fix: _____

3. Deduplication layer

- Question: When multiple systems claim the same deal, do we know which source wins and why?
- Check for: platform double-credit, no source-of-truth hierarchy, opportunity reassignment, overlapping campaign logic.
- Current state: Green / Yellow / Red
- Confidence band: Directional / Decision-safe
- Owner: _____

- Next fix: _____

4. Action layer

- Question: Does the attribution output change an actual budget, planning, or pipeline decision?
- Check for: interesting dashboards nobody uses, recurring caveats, no named review cadence, no clear budget owner.
- Current state: Green / Yellow / Red
- Confidence band: Directional / Decision-safe
- Owner: _____
- Next fix: _____

5. Foundation layer

- Question: Is the underlying CRM and warehouse logic stable enough for any attribution model to be trusted?
- Check for: unstable lifecycle stages, dirty lead-source fields, unreliable joins, inconsistent account matching, warehouse logic drift.
- Current state: Green / Yellow / Red
- Confidence band: Directional / Decision-safe
- Owner: _____
- Next fix: _____

Leadership summary

- The main failure layer is: _____
- The safest confidence band we can defend today is: Directional / Decision-safe / Board-grade
- The single next move for the next 30 days is: _____
- The executive owner for that move is: _____
- If this cannot be fixed inside the current operating model, escalate to: Where Did the Money Go? / Revenue Analytics / data-foundation cleanup.