

# Board-Ready Marketing Metrics Template & Confidence Rubric

## Domain Methods

Use this during board prep to separate the metrics that belong in the main story from the ones that belong in the appendix, and to make your confidence level explicit before someone else asks for it.

### 1. Five board metrics

Qualified pipeline created \_\_\_\_\_

Pipeline quality \_\_\_\_\_

Customer acquisition cost \_\_\_\_\_

Realized revenue impact \_\_\_\_\_

Confidence level \_\_\_\_\_

### 2. Confidence rubric

Directional = useful for pattern-spotting, not formal commitments

Decision-grade = strong enough for budget shifts and operating choices with caveats named

Board-grade = reconciled enough for board, forecast, or compensation-sensitive reporting

Current confidence on each headline metric: \_\_\_\_\_

### 3. Likely board questions to pre-answer

Why does marketing's number not match finance's? \_\_\_\_\_

Why did CAC change this quarter? \_\_\_\_\_

Which channels should we trust most right now? \_\_\_\_\_

Is this slowdown real or a measurement artifact? \_\_\_\_\_

What gets fixed before next quarter? \_\_\_\_\_

### 4. Improvement roadmap

Now: align metric definitions with finance and RevOps

Next 30 days: reconcile CRM-to-revenue mapping and lag windows

Next 60-90 days: tighten CAC logic, ownership, and caveat language

This quarter: retire shadow reporting paths and document the system of record

### 5. Board-prep operator check

Which metric should not be shown as precise yet? \_\_\_\_\_

What supporting appendix should be ready if a director asks one level deeper? \_\_\_\_\_

Who owns the next confidence-improving fix? \_\_\_\_\_

If the deck still depends on weak source logic, stale joins, or politically negotiated definitions, the problem is not presentation polish. It is a Data Foundation or Three Teams,

Three Numbers problem upstream.