

Board Reporting Response Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this before a board-reporting request becomes a polished slide. The goal is to choose the right response: board pack, confidence note, decision brief, or data-foundation escalation.

1. NAME THE REQUEST

- Board or leadership question: _____
- Metric family in scope: pipeline / bookings / ARR / CAC / attribution / retention / margin / other
- Meeting or deadline: _____
- The request is mainly: board assurance / decision support / status update / foundation escalation

2. CHECK DEFINITION STABILITY

- Do marketing, RevOps, sales, finance, and leadership use the same definition? yes / no
- Known disagreements or exclusions: _____
- Accountable definition owner: _____
- If not stable, default response: confidence note or metric-alignment work.

3. CHECK SOURCE RECONCILIATION

- Can the number be traced to source systems without live hand-translation? yes / no
- Manual steps or spreadsheet patches: _____
- System-of-record rule when sources disagree: _____
- If reconciliation is fragile, do not present the claim as board-grade.

4. LABEL EVIDENCE LEVEL

- Current level: directional / decision-grade / board-grade / cleanup-first

- Safe use right now: _____

- Not allowed yet: _____

- Caveat in plain English: _____

5. CHOOSE THE RESPONSE

- Board pack: definition stable, source reconciled, board-grade claim.

- Confidence note: useful signal, caveats must travel with the metric.

- Decision brief: bounded decision can move with explicit tradeoffs.

- Data-foundation escalation: recurring caveat needs owned repair.

Chosen response: _____

6. NAME NEXT PROOF

- Owner of next proof or repair: _____

- Evidence needed before the next board cycle: _____

- Review date: _____

- Recommended next step if help is needed: Three Teams, Three Numbers / Data Foundation