

dbt Trust Triage Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this before your next dbt remediation meeting. The goal is to stop treating every trust problem like a modeling problem and separate the real break into the buckets that actually matter.

STEP 1: NAME THE BUSINESS TRUST BREAK

- Which number, dashboard, or workflow is losing trust right now?
- Who notices the problem first: finance, RevOps, marketing, product, or leadership?
- What decision is getting delayed or caveated because of it?

STEP 2: SCORE THE LIKELY FAILURE POINTS FROM 1 TO 5

- Testing coverage: do critical models have schema and business-rule tests that would catch the break quickly?
- Source cleanliness: are duplicates, stale values, or garbage records entering the project upstream?
- Model scope: are the marts specific to real business questions, or too generic to be trusted?
- Documentation: can a new stakeholder understand includes, excludes, owner, and caveats without a Slack thread?
- Stakeholder fit: is there a named business owner who agreed this model answers the right question?

STEP 3: IDENTIFY THE FIRST MOVE

- If testing scored lowest, add minimum coverage on the critical path first.
- If source cleanliness scored lowest, fix staging rules before touching marts.
- If model scope scored lowest, narrow the model to the real business entity or decision.
- If documentation scored lowest, rewrite the top definitions in business language.

- If stakeholder fit scored lowest, pause build work until the ask is translated clearly.

MEETING NOTES

- Metric or workflow losing trust:
- Main root cause bucket:
- First remediation step this week:
- Named owner for the fix:
- What will prove trust improved within 30 days: