

## Decision Surface Discussion Aid

### Domain Methods

#### WHAT THIS WORKSHEET IS FOR

Use this sheet to decide whether a reporting surface belongs to optimization, operating cadence, strategic planning, or executive communication before one dashboard gets dragged across every room.

#### 1. NAME THE CURRENT SURFACE

- What report, dashboard, deck, or scorecard is the room reusing? \_\_\_\_\_
- Who owns it today? \_\_\_\_\_
- Which meeting is trying to reuse it next? \_\_\_\_\_

#### 2. OPTIMIZATION CHECK

- What near-term action should change? \_\_\_\_\_
- Which caveats are acceptable for operator use? \_\_\_\_\_
- What detail makes the surface useful for tuning work? \_\_\_\_\_

#### 3. OPERATING CADENCE CHECK

- Which weekly or monthly review depends on this view? \_\_\_\_\_
- What definition drift or repeated caveat is slowing the meeting down? \_
- Does the room have one owner for interpretation? \_\_\_\_\_

#### 4. STRATEGIC PLANNING CHECK

- What quarter-level decision is this surface being asked to support? \_\_
- Which assumptions must be explicit before planning against it? \_\_\_\_\_
- What planning-safe summary is missing today? \_\_\_\_\_

#### 5. EXECUTIVE / BOARD CHECK

- Would you defend this exact surface in front of the executive team or board? Why or why not?

- What confidence label belongs on the core number? \_\_\_\_\_

- Which caveat needs tighter control before executive use? \_\_\_\_\_

#### 6. SPLIT, UPGRADE, OR CONTAIN

- Keep as-is for one surface only? \_\_\_\_\_

- Create a tighter operating version? \_\_\_\_\_

- Add a planning brief or scorecard layer? \_\_\_\_\_

- Create an executive / board-safe summary? \_\_\_\_\_

#### 7. OWNER AND NEXT MOVE

- Who owns each approved surface? \_\_\_\_\_

- Which context should stop using the current surface immediately? \_\_\_\_\_

- Best next move: translation sprint, metric alignment, surface split, or trust cleanup

#### NEXT STEPS

- Use Three Teams, Three Numbers if the mismatch is really a definition conflict.

- Use Translate the Ask if the room still has not named the decision and audience clearly.

- Use the Reporting Artifact Hierarchy if the output family itself is still undecided.