

Directional Metric Escalation Worksheet

Domain Methods

Use this before a useful but not-yet-board-grade metric moves into an executive, board, forecast, budget, or accountability conversation.

1. Name the metric and decision

Metric and reporting window: _____

Decision requested: _____

Meeting / artifact where it will appear: _____

Current confidence level: Directional / Decision-grade / Board-grade / Commitment-grade

2. Decide what the number is allowed to support

Pattern spotting / early read: _____

Operating decision allowed now: _____

Board narrative allowed now? Yes / No / With caveats: _____

Forecast, compensation, or workflow automation allowed? _____

3. Write the hard limit

This metric should NOT be used yet for:

Directional Metric Escalation Worksheet - Owner + Upgrade Path

4. Translate the caveat into business language

Technical caveat: _____

Business-language caveat leadership must see: _____

What conclusion could change if this caveat moves? _____

5. Assign ownership

Business owner with decision authority: _____

Technical / data remediation owner: _____

Fallback rule if systems disagree before the next review: _____

6. Define next proof

Evidence needed to upgrade confidence: _____

First remediation step before the next meeting: _____

Review date: _____ Escalation owner: _____

7. Route the real problem

If teams disagree about which version wins, use Three Teams, Three Numbers. If the decision itself is unclear, use Translate the Ask.