

Discount Approval Confidence Worksheet

Use this for one discount rule, pricing exception, or contract concession before it affects forecast, renewal, compensation, margin, or board-facing ARR decisions.

1. Name the decision

Decision this rule will influence: forecast / renewal pricing / compensation / margin / board ARR / data-foundation escalation.

Rule or exception being reviewed: _____

Segment, motion, or deal type in scope: _____

2. Score the seven controls

Score each control 0-3: 0 missing or disputed; 1 manually rescued; 2 usable with caveats; 3 documented, owned, and reconciled.

Definition: discounts, credits, payment terms, ramped pricing, free months, implementation concessions. Score: ____

Source precedence: CRM, CPQ, contract, billing, finance recognition, warehouse model. Score: ____

Approval authority: threshold, approver, evidence, and escalation path. Score: ____

Reason-code quality: commercial tradeoff is specific enough to explain margin or ARR movement. Score: ____

Contract and billing reconciliation: signed terms, invoices, and finance treatment agree. Score: ____

Renewal and expansion treatment: temporary concessions expire, reset, or carry forward by policy. Score: ____

Exception log and retroactive policy: overrides and history changes are recorded. Score: ____

3. Assign the confidence band

Total possible score: 21. Use the weakest critical control as a veto if it affects the decision.

0-7: Unsafe. Use only as evidence for repair and leadership escalation.

8-13: Usable with caveats. Safe for diagnosis or limited operating review only.

14-18: Decision-grade. Safe for one named decision with caveats and owner visible.

19-21: Finance-aligned. Safe for formal forecast, margin, board, or compensation-sensitive use within documented scope.

4. Write the not-for line

Until repaired, this rule should NOT be used for: _____

Reason: _____

5. Choose the first repair

Weakest control: _____ Owner: _____ Due date: _____

First useful repair: definition / source precedence / approval path / reason codes / billing reconciliation / renewal treatment / exception log.

Next review date: _____ Decision owner: _____

Domain Methods next step

If teams disagree about which rule wins, start with Three Teams, Three Numbers. If the source path cannot hold, start with Data Foundation.