

## First Five Metrics Governance Worksheet

### Domain Methods

#### WHAT THIS WORKSHEET IS FOR

Use this in a RevOps, finance, marketing, or data working session when everyone agrees governance matters but nobody agrees where to start. The goal is to pick the two to five metrics worth governing first instead of turning the project into KPI theater.

#### STEP 1: LIST THE CANDIDATE METRICS

- Which metrics are getting argued about in forecast reviews, board prep, budget meetings, or compensation conversations?
- Which metric names keep showing up with different definitions across teams?
- Which numbers already need a spoken caveat every time they appear?

#### STEP 2: SCORE EACH CANDIDATE FROM 1 TO 5

- Executive visibility: how often does leadership ask for it?
- Decision frequency: how often does this metric change spend, hiring, planning, or accountability?
- Cross-team conflict: how much disagreement exists around meaning, owner, or source of truth?
- Downstream system impact: how many dashboards, models, or workflows depend on it?
- Reporting or compensation risk: how expensive would it be to keep this metric fuzzy?

#### STEP 3: PRESSURE-TEST THE TOP SCORERS

- Can we name one accountable owner for the definition?
- Can we name the current system of record or the current trust break?
- Can we improve this metric without reopening every KPI in the company?

#### STEP 4: DECIDE WHAT TO GOVERN NOW VERSUS LATER

- First governed metrics (choose two to five):
- Metrics to defer for now:

- Why those deferred metrics are not worth the first round yet:

#### MEETING SUMMARY

- Highest-stakes metric conflict:

- First owner to assign:

- First workflow or reporting fix to schedule:

- Review date for checking whether these metrics are holding: