

GTM Handshake Benchmark Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this sheet in one live working session to score whether the handoff from marketing capture to sales process to finance-visible revenue is clean enough to support one trustworthy story.

1. DEFINE THE HANDOFF IN SCOPE

- Workflow being scored: _____
- Recurring meeting this affects: _____
- Metric or story under pressure: _____
- Why this handoff matters now: _____

2. SCORE THE SIX DIMENSIONS FROM 1 TO 3

- Capture linkage quality: does campaign/source evidence survive into the downstream reporting path?
- Stage-definition consistency: do marketing, sales, and finance use the same lifecycle meaning?
- Owner clarity: is each transfer point owned, including escalation when the record becomes contested?
- Override discipline: are manual source, stage, or classification changes logged and reviewable?
- Finance-visible lag: does the GTM truth reach the finance-facing story in time for the meeting that matters?
- Reconciliation repeatability: do disagreements resolve through a known playbook instead of a custom rescue thread?

3. TRANSFER-POINT DIAGNOSTICS

- Where does the story change first? _____
- Which team has the cleanest local truth? _____

- Which field, stage, or artifact is carrying more than one meaning? ____
- Which handoff still depends on operator memory? _____

4. OVERRIDE AND DISAGREEMENT LOG

- Most common manual correction: _____
- Who is allowed to change the story today? _____
- Which artifact wins first when numbers disagree? _____
- What evidence can overturn that winner? _____

5. TOTAL SCORE AND HANDSHAKE BAND

- 6 to 8 = Clean enough to trust
- 9 to 13 = Usable but distorting
- 14 to 18 = Breaking the story
- Current total: _____

6. NEXT MOVE BEFORE THE NEXT REVIEW

- First fix: capture / definitions / owner path / finance lag / fallback rule
- Named owner for the fix: _____
- Confidence label for the current story: directional / decision-grade / board-grade
- What should the room stop pretending is settled? _____

SUGGESTED ROUTES

- Use Three Teams, Three Numbers when marketing, sales, finance, and data each have a defensible version of the number.
- Use Where Did the Money Go? when spend-to-revenue linkage is the first place the handoff starts breaking down.