

Inherited Reporting Debt Triage Worksheet

Domain Methods

Use this worksheet before ordering another dashboard rebuild. Score the reports, spreadsheets, meeting packs, and recurring pulls a new leader inherits by decision value and risk.

1. Inventory the reporting estate

- Meeting or review where this asset appears: _____
- Current owner / defender of the number: _____
- Decision it is supposed to support: _____

2. Score the asset

- Executive visibility (1 low - 5 high): _____
- Decision frequency (1 rare - 5 weekly): _____
- Definition clarity (1 unclear - 5 stable): _____
- Source trust (1 unknown - 5 trusted): _____
- Cost of being wrong (1 low - 5 high): _____

3. Choose the next status

- Keep and trust Keep with caveat Fix before next cycle
- Retire or merge Defer until source or definition work is cleaner

4. Name the cleanup move

- What must be true before this asset drives a budget, board, or forecast decision?

- Who owns that proof or cleanup? _____
- Review date: _____

5. First-month operating rule

Do not rebuild the reporting surface until the decision, owner, confidence level, and cost of being wrong are clear enough to defend in the meeting that uses it.