

KPI Review Alignment Checklist

Use this before the next recurring KPI review to keep a directional metric from quietly becoming a budget, hiring, forecast, or board commitment before it has earned that job.

1. Name the decision use

- What decision might this metric influence in the meeting?
- Triage / weekly operating action / budget movement / forecast posture / board narrative / compensation-sensitive use

2. Label confidence

- Directional: useful for pattern-spotting, not commitments.
- Decision-grade: safe for bounded operating choices with known caveats.
- Board-grade: reconciled enough for executive narrative.
- Not safe yet: the meeting should not act on it for this decision.

3. Record the caveat

- Write the one caveat that would change how leadership should use the number: source lag, definition conflict, exclusion, manual adjustment, attribution gap, or owner uncertainty.

4. Assign the owner

- Who owns the definition? Who owns the source path? Who can approve the next confidence upgrade? If nobody owns it, the caveat will come back next month.

5. Define the next proof

- What must be true before the number can carry more weight: reconciliation, finance sign-off, source cleanup, stable calculation logic, documented exclusions, or adoption in the live operating surface?

Close the review

- Write the rule the room agreed to: what the number can support now, what it must not support yet, who owns the next proof, and when the confidence label gets reviewed again.