

Marketing Data Audit Worksheet & Scorecard

Domain Methods

Use this in a two-day working session to compare the numbers leadership actually uses, expose the manual translation layer, and leave with a short list of trust breaks worth fixing now.

1. Working-session setup

Decision being protected: _____

Time window under review: _____

Facilitator / owner: _____

Teams in the room: Marketing / RevOps / Finance / Data / Leadership

Systems in scope: ad platforms / CRM / warehouse / BI / finance / spreadsheet layer

2. Compare the same metric across sources

Use one row per high-consequence metric. Start with pipeline, CAC, sourced revenue, influenced revenue, or whatever number changes budget, board language, or forecast confidence.

Metric | Decision it supports | Source 1 | Source 2 | Source 3 | Caveat / manual fix

3. Score the trust break

Definition mismatch? Low / Medium / High

Freshness problem? Low / Medium / High

Manual spreadsheet translation needed? Yes / No

Could this change budget, board, pipeline, or revenue decisions? Yes / No

Risk level: Cosmetic / Reporting risk / Decision risk

4. Operator notes

Where does a human keep compensating for the system? Note the Slack caveat, spreadsheet adjustment, relabeling step, finance override, or dashboard disclaimer that tells you the reporting layer is already failing the business.

5. End-of-session scorecard

Top 3 trust breaks to fix this quarter: _____

Owner for each fix: _____

What should stop appearing in the board / exec deck until fixed? _____

Next move: narrow attribution diagnostic / broader reporting-governance cleanup / deeper system rebuild

If the spend story falls apart once revenue enters the conversation, start with Where Did the Money Go?. If the issue keeps showing up across definitions, dashboards, and handoffs, the next move is Revenue Analytics.