

## Metric Alignment Workshop Kit - Domain Methods

A lightweight facilitation kit for getting marketing, sales, finance, and data aligned on metric definitions.

### 1. Pre-work request

- Ask each team for the metric definition they use today.
- Capture the report they trust most and the source system behind it.
- Ask what decision the metric supports and what they believe is wrong with other versions.

### 2. 90-minute agenda

- 0-10 min: frame the problem and the decision that needs a trusted metric.
- 10-25 min: review competing definitions side by side.
- 25-45 min: complete the metric decision table for the top 1-3 disputed metrics.
- 45-65 min: decide canonical definitions, allowed alternate uses, and unresolved caveats.
- 65-80 min: assign owners and required CRM, warehouse, or dashboard fixes.
- 80-90 min: draft the rollout note and next review date.

### 3. Metric decision table

- Metric label:
- Business decision it supports:
- Exact definition and time window:
- What it excludes:
- System of record:
- Confidence level needed: directional / decision-grade / board-grade
- Owner for future changes:
- Open caveats or follow-up fixes:

### 4. Conflict-resolution prompts

- Is this disagreement really about timing, ownership, or use case rather than arithmetic?
- Is the number useful for one team but not universal for leadership reporting?
- What assumption stays hidden unless we name the exclusions directly?
- What breaks if we treat this number as more trustworthy than it currently is?

### 5. Rollout note template

- Starting this quarter, the official metric for [decision] is [metric].
- It is defined as [definition] and sourced from [system].
- Other related metrics remain valid for [use cases], but should not replace this one in [meetings].
- Known gaps: [gaps]. Owners: [owners]. Next review date: [date].

Need help facilitating this in a live environment?

Start with Three Teams, Three Numbers at [domainmethods.com/services/three-teams-three-numbers](https://domainmethods.com/services/three-teams-three-numbers)