

Metric Confidence Ladder Meeting Cheat Sheet

Domain Methods

USE THIS WORKSHEET WHEN ONE NUMBER IS BEING ASKED TO DO TOO MANY JOBS

The goal is to label each core metric by how hard the business can lean on it right now. This is not about shaming imperfect data. It is about stopping people from using directional numbers like executive commitments.

THE FOUR LADDER RUNGS

- Directional: safe for pattern-spotting, not for budget, board, compensation, or automation commitments.
- Decision-grade: good enough for operating choices with named caveats and owner review.
- Board-grade: reconciled and governed enough for executive and board narrative.
- Commitment-grade: strong enough to sit inside compensation plans, quotas, contractual promises, or automated downstream actions with real business exposure.

FOR EACH METRIC, WRITE DOWN

- Metric name and owner
- Where the number comes from
- Current rung on the ladder
- Allowed use right now
- Dangerous misuse right now
- What must improve to move up one rung

QUICK PRESSURE-TEST QUESTIONS

- Do marketing, RevOps, finance, and data define it the same way?
- Can someone explain the caveats without turning the answer into a debate?
- Would you still use this number in a board deck if one source refreshed late?
- Would you let this number trigger compensation, spend shifts, or workflow automation

today?

COMMON SIGNS A METRIC IS MISLABELED

- The board number gets rewritten manually before the meeting.
- Channel spend moves based on a number nobody can reconcile a week later.
- A forecast call uses one definition while the CRM dashboard uses another.
- Teams say 'directionally right' every week as if that is a permanent operating state.

MEETING OUTPUT

- Metrics that are safe to keep directional for now:
- Metrics that must become decision-grade next:
- Metrics that need board-grade treatment before the next executive review:
- Metrics that should never be treated as commitment-grade without deeper foundation work:
- First owner, first trust fix, and next review date: