

Metric Confidence Review Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this before a forecast review, QBR, or board-prep meeting when a metric is carrying more confidence than the team has actually earned. The goal is to classify the number honestly, surface the caveats that matter, and decide the next trust-building fix.

STEP 1: NAME THE METRIC UNDER PRESSURE

- Metric or KPI being debated:
- Decision this number is supposed to support:
- Team or leader pushing hardest to use it right now:
- Why the meeting is tempted to move faster than the evidence:

STEP 2: CLASSIFY THE CONFIDENCE LEVEL

- Directional: good for trend-spotting, not for commitments.
- Decision-grade: strong enough for team-level operating choices with explicit caveats.
- Board-grade: reconciled, governed, and stable enough for executive commitments.
- Current level for this metric:

STEP 3: SCORE THE TRUST RISKS FROM 1 TO 5

- Definition drift: do teams still mean different things by this metric?
- Source reliability: are the upstream systems clean and current enough to trust?
- Manual adjustment load: how much spreadsheet patching or caveat-carrying happens before the number gets shown?
- Political pressure: how strong is the urge to present certainty before the logic is settled?
- Decision risk: how expensive would it be to use this number too confidently?

STEP 4: WRITE THE CAVEAT THAT SHOULD TRAVEL WITH THE METRIC

- System of record for this use case:
- Known caveat or reconciliation gap leadership needs to hear:
- Safe use case today:
- Unsafe use case today:

STEP 5: DECIDE THE NEXT TRUST-BUILDING MOVE

- Fix the definition record first:
- Reconcile the source systems first:
- Label the number more honestly in the dashboard or deck:
- Escalate into a broader alignment or governance session:

REVIEW SUMMARY

- Metric reviewed:
- Current confidence label:
- Main risk hiding behind the number:
- Next fix owner:
- Date to re-check whether the metric moved closer to board-grade: