

Quota-Crediting Confidence Worksheet

Use this for one compensation-sensitive rule before it affects quota credit, partner credit, or payout.

1. Rule under review

Decision this rule will affect: _____

Rule owner: _____ Executive sponsor: _____

Rule scope: rep quota / partner credit / territory / expansion / revenue recognition / other

2. Confidence band

Directional: useful for learning, not payout.

Decision-grade: stable enough for a named operating decision with caveats.

Compensation-grade: definition, source, timing, exceptions, dispute log, and retroactive policy are documented and owned.

Not safe yet: disputed, manually rescued, or inconsistent across systems.

Current band: Directional / Decision-grade / Compensation-grade / Not safe yet

Weakest control lowering confidence: _____

3. Required controls

Plain-English definition: what counts, what does not, and examples.

Source precedence: CRM, warehouse, finance table, partner record, or contract source that wins.

Timing cutoff: the date or event that locks credit for this period.

Eligibility and exclusions: partner, expansion, renewal, reopen, duplicate, territory-move, and house-account rules.

Exception authority: who can approve an override and what evidence is required.

Dispute log: where challenges, final rulings, and rationale are recorded.

Retroactive policy: when history can change credit after payout or reporting.

4. Unsafe uses

This rule must NOT be used for: _____

Reason: _____

Minimum repair before payout depends on it: _____

5. Next repair

Owner: _____ Due date: _____ Review meeting: _____

First repair: definition / source precedence / timing cutoff / exception log / dispute log / retroactive policy

Evidence required before upgrade: _____

Domain Methods note

If the fight is about which team definition should win, start with Three Teams, Three Numbers. If the definition is clear but the source path cannot hold, start with Data Foundation.