

# Reporting Rework Benchmark Worksheet

## Domain Methods

### How to use this worksheet

- Use this with the people who actually assemble or defend the recurring executive report.
- Score one reporting package only: the weekly exec report, board-prep pack, or KPI review that keeps creating cleanup pressure.
- For each dimension, assign 1 = low rework burden, 2 = moderate rework burden, 3 = high rework burden.
- Then total the score and classify the report as Operationally reliable (5-7), Manageable but fragile (8-11), or Hidden tax (12-15).

### 1. Manual touchpoints

- Question: How many hand edits, exports, joins, or commentary passes happen after the official report already exists?
- Look for: spreadsheet patching, manual KPI restatement, copied caveats, one-off data pulls, last-minute Slack validation.
- Score (1-3): \_\_\_\_ Current owner: \_\_\_\_\_
- What keeps this step manual? \_\_\_\_\_

### 2. Spreadsheet dependencies

- Question: Does the leadership-trusted version still depend on side spreadsheets instead of the governed reporting path?
- Look for: private tabs, finance-only versions, board-deck copies, hand-maintained mapping tables, manual exception sheets.
- Score (1-3): \_\_\_\_ System the team actually trusts: \_\_\_\_\_
- What logic still lives outside the official workflow? \_\_\_\_\_

### 3. Recurring caveats

- Question: How often do the same warnings travel with the report every cycle?
- Look for: repeated notes about stage drift, delayed costs, backfills, definition caveats, or timing gaps nobody fixed.
- Score (1-3): \_\_\_\_ Repeated caveat: \_\_\_\_\_
- What issue keeps surviving from cycle to cycle? \_\_\_\_\_

### 4. Owner count

- Question: How many people must bless the report before leadership can use it with confidence?
- Look for: RevOps-finance-marketing reconciliation loops, unclear signoff, borrowed ownership, unofficial approvers.
- Score (1-3): \_\_\_\_ Teams involved: \_\_\_\_\_
- Where is ownership blurry? \_\_\_\_\_

### 5. Cycle time

- Question: Once the reporting window closes, how long does it take to produce a defensible packet?
- Look for: same-day rescue work, recurring waiting on exports, manual QA, or board-prep compression every cycle.
- Score (1-3): \_\_\_\_\_ Time to ready-for-leadership: \_\_\_\_\_
- What step creates the most drag? \_\_\_\_\_

### Leadership summary

- Total score: \_\_\_\_\_ Band: Operationally reliable / Manageable but fragile / Hidden tax
- Main failure mode: artifact mismatch / definition conflict / source fragility / owner sprawl
- One next move before the next cycle: \_\_\_\_\_
- If the report is solving the wrong job, route to Translate the Ask.
- If the report keeps re-litigating whose number is right, route to Three Teams, Three Numbers.