

## Reporting System-of-Record Scorecard

### Domain Methods

#### WHAT THIS IS FOR

Use this in a RevOps, finance, sales, or data working session when leadership keeps asking where the official reporting answer should actually live. The goal is to compare native CRM reporting, warehouse reporting, and a spreadsheet bridge against the real decision, not against tool hype.

#### STEP 1: DEFINE THE DECISION

- Which meeting keeps breaking first: forecast review, board prep, budget conversation, pipeline review, or monthly business review?
- What exact question must the reporting answer support?
- Which confidence bar matters: directional, decision-grade, or board-grade?

#### STEP 2: SCORE EACH OPTION FROM 1 TO 5

- Source coverage: how completely does this option capture the systems the answer depends on?
- Trust under pressure: how comfortable would you be defending the number in front of finance, sales, and leadership at once?
- Manual rescue burden: how many exports, tie-outs, and caveats are still required before the number is usable?
- Owner clarity: can you name who owns the logic, exceptions, and maintenance?
- Maintainability: how likely is this path to survive the next harder question without rebuilding from scratch?

#### NATIVE CRM REPORTING FIT CHECK

- Best when the question mostly lives inside CRM-owned process and fields.
- Strong if stage discipline is real and commercial owners can explain the number end to end without opening another system.
- Warning signs: finance timing, product data, identity stitching, or repeated spreadsheet rescue work still sit outside the CRM path.

#### WAREHOUSE REPORTING FIT CHECK

- Best when the answer depends on multiple systems, modeled logic, or repeatable executive reporting.
- Strong if the business needs auditability, historical consistency, and a reporting path that can survive scrutiny across teams.
- Warning signs: definitions are still unresolved, nobody owns the metric, or the team is about to overbuild before the business has settled the use case.

#### SPREADSHEET BRIDGE FIT CHECK

- Best as a short-term bridge with one named owner, visible logic, and an expiration date.
- Strong only when everyone agrees the file is temporary and the confidence limit is explicit.
- Warning signs: one person becomes the invisible middleware, the spreadsheet becomes the real source of truth, or version drift shows up before every leadership meeting.

#### FINAL DECISION

- Highest-scoring option for this use case:
- Why this path wins right now:
- Which hidden risk still needs mitigation:
- Owner:
- Review date:

#### ESCALATION NOTE

If the conversation keeps collapsing into arguments about what the metric means, stop the tool debate. Route the next step into definition and ownership cleanup before moving more reporting around.