

Reporting Trust Triage Worksheet

Domain Methods

How to use this worksheet

- Use this in the meeting where the reporting trust break is already costing time: forecast review, board prep, budget review, or weekly performance review.
- Score the same problem across three layers: definitions, source data, and dashboards / reporting artifacts.
- The layer with the strongest evidence is the first fix. Do not turn one triage session into three parallel projects unless the room explicitly chooses that tradeoff.

1. Name the meeting failure

- Which meeting or decision keeps breaking first?

- What happened in that meeting: disagreement on meaning, bad records, or bad presentation? _____
- Which team feels the pain most: marketing / sales / finance / RevOps / data / leadership? _____

2. Definitions score

- Do adjacent teams use the same metric label differently? yes / no
- Do people argue about exclusions, ownership, or use case before anyone checks records? yes / no
- Definitions score (0-3): _____ Main metric in dispute:

- Best next move if this layer wins: lock the definition, owner, confidence level, and use case.

3. Source-data score

- Is the definition mostly understood, but records still fail reconciliation? yes / no
- Does the trusted number still depend on exports, side spreadsheets, or undocumented patches? yes / no
- Source-data score (0-3): _____ Most fragile system or handoff:

- Best next move if this layer wins: trace the logic path and remove recurring manual rescue work.

4. Dashboard / artifact score

- Do people trust the number more than they trust the output shape? yes / no
- Would the meeting improve if the same truth were delivered in a different format? yes / no
- Artifact score (0-3): _____ Current output: dashboard / board pack / brief / alert / other
- Best next move if this layer wins: redesign the output or choose the tighter

artifact for the decision.

5. First-move decision

- Highest score: definitions / source data / dashboard
- What is the single smallest fix that would make the next important meeting cleaner?

- If the issue is cross-functional metric conflict, route to Three Teams, Three Numbers.

- If the issue is brittle records, mappings, joins, or warehouse logic, route to Data Foundation.