

Retention Confidence Worksheet

Use this for one retention, churn, or expansion metric before it drives board, forecast, staffing, or expansion decisions.

1. Metric under review

Decision this metric will affect: _____

Metric owner: _____ Executive sponsor: _____

Metric scope: gross retention / NRR / churn / contraction / expansion / renewal / other

2. Confidence band

Directional: useful for trend spotting, not leadership commitment.

Diagnostic-grade: stable enough to investigate causes with visible caveats.

Leadership-grade: population, movement, hierarchy, cutoffs, source precedence, and QA are documented and owned.

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

Current band: Directional / Diagnostic-grade / Leadership-grade / Not safe yet

Weakest control lowering confidence: _____

3. Required controls

Starting population: customers, subscriptions, accounts, products, and exclusions.

Movement taxonomy: churn, contraction, expansion, reactivation, refunds, credits, and migrations.

Account hierarchy: parent account, workspace, tenant, subscription, and billing rollup.

Period cutoff: contract, invoice, renewal, CRM close, finance close, or another lock date.

Source precedence: billing, CRM, finance, warehouse, or CS system that wins.

Ownership rules: who explains renewal, expansion, downgrade, churn, and account status.

QA cadence: how the number is checked before board, forecast, or staffing use.

4. Unsafe uses

This metric must NOT be used for: _____

Reason: _____

Minimum repair before leadership depends on it: _____

5. Next repair

Owner: _____ Due date: _____ Review meeting: _____

First repair: population / movement taxonomy / hierarchy / cutoff / source precedence / ownership / QA

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.