

Revenue Bridge Confidence Worksheet

Use this for one ARR or revenue bridge before it drives board narrative, forecast review, or operating planning.

1. Bridge decision

Decision this bridge will affect: _____

Bridge owner: _____ Executive sponsor: _____

Scope: board prep / forecast / operating plan / renewal / expansion / other

2. Confidence band

Directional: useful for investigation, not formal commitment.

Decision-grade: stable enough for one operating review or planning tradeoff.

Board-grade: reconciled, owned, finance-reviewed, and caveats travel with it.

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

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

Weakest control lowering confidence: _____

3. Required bridge controls

Starting base: ARR/MRR amount, customer/account scope, currency, and cutoff.

Movement taxonomy: new, expansion, contraction, churn, reactivation, adjustment.

Source precedence: which system wins for amount, date, account, and category.

Account hierarchy: parent, subsidiary, workspace, subscription, and CRM rollup.

Timing rules: contract, invoice, billing effective date, CRM close, finance close.

Adjustment policy: FX, refunds, credits, migrations, billing-plan changes.

Pre-review QA: owner, sign-off, caveats, and late-change path before the meeting.

4. Unsafe uses

This bridge must NOT be used for: _____

Reason: _____

Caveat that must travel with the bridge: _____

5. Next repair

Owner: _____ Due date: _____ Review meeting: _____

First repair: category rule / source precedence / hierarchy / cutoff / QA

Evidence required before upgrade: _____

Domain Methods note

If teams disagree on which movement definition should win, start with Three Teams, Three Numbers. If the definition is clear but source systems cannot hold the bridge, start with Data Foundation.