

Revenue Data Trust Score Worksheet

Domain Methods

Use this worksheet to grade whether your revenue reporting deserves board-level confidence or still needs caveats every time it shows up in a leadership meeting.

Score each dimension from 0 to 20. Mark what is dragging the score down, then assign the next owner and fix before the next planning or board cycle.

Trust bands

0-39 = Fragile | 40-59 = Conditional | 60-79 = Decision-grade | 80-100 = High trust

Use directional / decision-grade / board-grade labels openly when a metric is not equally trustworthy for every use case.

Scoring table

1. Definition clarity: Do marketing, sales, finance, and RevOps mean the same thing when they say revenue? Score: ____ Owner: _____
2. System of record strength: Can one model or system reproduce the number without debate? Score: ____ Owner: _____
3. Reconciliation effort: How much spreadsheet cleanup happens before leadership sees the metric? Score: ____ Owner: _____
4. Workflow adoption: Is the trusted number the one people actually use in planning and board prep? Score: ____ Owner: _____
5. Governance discipline: Are ownership, caveats, and change-control rules explicit? Score: ____ Owner: _____

TOTAL SCORE: _____ / 100

What is dragging trust down?

Metric / report: _____

What makes it fragile right now? _____

Is the problem mostly definition alignment, system repair, or governance? _____

What is the next fix before the next planning or board cycle? _____

Confidence label for this metric

Directional / Decision-grade / Board-grade (circle one)

Next 30-day actions

1. _____
2. _____
3. _____