

Revenue Handshake Framework Review Sheet

Domain Methods

WHAT THIS SHEET IS FOR

Use this sheet to find the first layer where revenue truth forks, record the downstream symptom the room is currently arguing about, and assign the next repair owner before another exec review hardens the workaround.

1. START WITH ONE REAL NUMBER

- Metric or question in dispute: _____
- Meeting where it keeps coming up: _____
- Why this number matters right now: _____

2. MARK THE HANDSHAKE PATH

- Capture and linkage issue? _____
- CRM stage or ownership rule issue? _____
- Qualification handoff issue? _____
- Warehouse logic or join issue? _____
- Finance or exec reporting issue? _____

3. IDENTIFY THE FIRST FORK

- Earliest layer where the story stops surviving the handoff: _____
- What exactly bends there? _____
- What evidence should survive but does not? _____

4. RECORD THE DOWNSTREAM SYMPTOM

- What is the room arguing about today? _____
- Which team feels the pain most visibly? _____
- Why this symptom is later than the real break: _____

5. NAME THE OWNER FOR THE NEXT FIX

- Owner of the broken handshake layer: _____
- Owner carrying the cleanup today: _____
- Where those owners differ: _____

6. CHOOSE THE NEXT MOVE

- Tighten capture and linkage rules: yes / no
- Reset CRM stage and ownership logic: yes / no
- Settle qualification handoff policy: yes / no
- Patch warehouse translation logic: yes / no
- Set executive definition authority: yes / no
- First fix to make this week: _____

NEXT STEPS

- Use Three Teams, Three Numbers when the room still needs a shared decision on which number should drive the meeting.
- Use Where Did the Money Go? when the first fork is already happening in capture, attribution, or handoff evidence before finance sees the metric.