

RevOps Data Cleanup Worksheet

60-day credibility plan for RevOps leaders at mid-size SaaS companies.
Use this worksheet to scope the real trust breaks before the project expands.

FRAME THE DECISION PROBLEM

1. Which leadership decisions are slowed down by conflicting pipeline, revenue, lifecycle, or CAC numbers?
2. Which dashboards or exports get used with caveats in the room?
3. Which spreadsheet is carrying the real decision work right now?

METRIC RISK TRIAGE

Metric/report:

Current trust break:

Classification: Cosmetic / Reporting-risk / Decision-risk

Decision affected:

System of record today:

Manual workaround in use:

ALIGNMENT SESSION NOTES

Metric name:

Primary decision it supports:

Canonical definition:

What it excludes:

Who approves future changes:

Where this number is calculated:

HIGHEST-LEVERAGE FIXES FOR THE NEXT 60 DAYS

1. Fix with the biggest trust payoff:
2. Fix with the biggest executive reporting payoff:
3. Fix that reduces recurring spreadsheet workarounds:

GOVERNANCE CHECKLIST

Review cadence:

Escalation path:

Change log location:

Next-quarter priorities:

MEETING SCRIPT PROMPTS

- What decision is this metric supposed to improve?
- Which number is fit for that decision, and why?
- What is the spreadsheet or manual patch compensating for?
- What exactly needs an owner before the next planning cycle?

Domain Methods: turn messy marketing and revenue data into decisions leaders trust.