

RevOps Operating Rules Audit

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this sheet to separate dirty-field symptoms from the rule failures that keep recreating the mess: unclear stage criteria, override rights, exception handling, owner authority, and downstream workflow fallout.

1. PICK ONE CRM WORKFLOW

- Workflow in scope: _____

- Team depending on it this week: _____

- Decision this workflow is supposed to support: _____

- What keeps getting called a data-quality problem: _____

2. NAME THE RULE UNDERNEATH THE MESS

- Lifecycle or handoff rule in question: _____

- Exact field or status people keep editing around: _____

- What event should change the record? _____

- What event should never change it automatically? _____

3. SET OWNER AND OVERRIDE AUTHORITY

- Primary owner of the rule: _____

- Who can approve an override: _____

- Who has to be notified when the rule is bypassed: _____

- What evidence is required before an override is allowed: _____

4. WRITE THE EXCEPTION PATH

- Which records do not fit the normal rule: _____

- How should those exceptions be flagged: _____

- Human fallback when the workflow cannot decide: _____

- Queue, SLA, or review step for unresolved cases: _____

5. TRACE THE DOWNSTREAM CONSEQUENCE

- Which alert, routing rule, report, or model breaks when this rule is ignored:

- Which team feels the damage first: _____

- What manual workaround is happening today: _____

- Which workaround should be retired after the rule is fixed: _____

6. CHOOSE THE NEXT MOVE

- Rule needs definition: yes / no

- Rule exists but owner authority is weak: yes / no

- Exception handling is missing: yes / no

- The system or sync is still brittle after the rule is clear: yes / no

- First concrete next step: _____

SUGGESTED NEXT ROUTES

- Use Data Foundation when the rule is clear but the CRM, syncs, or downstream reporting cannot carry it reliably.

- Use the AI readiness audit when automation pressure is forcing weak workflow logic into higher-stakes operating decisions.