

Shadow Spreadsheet Root-Cause Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this in the next spreadsheet cleanup conversation, weekly reporting review, or leadership prep meeting. The goal is to identify what the spreadsheet is compensating for before you waste time policing the file instead of fixing the operating break.

STEP 1: NAME THE SPREADSHEET THAT MATTERS

- Which spreadsheet keeps showing up in real meetings, budget reviews, or board prep?
- Who owns it today, and who trusts it more than the official report?
- What decision gets made with it?

STEP 2: SCORE THE LIKELY ROOT CAUSES FROM 1 TO 5

- Decision mismatch: the official dashboard exists, but it still does not answer the real question.
- Freshness gap: the official number is too stale for the meeting or workflow cadence.
- Definition drift: the spreadsheet is correcting a KPI meaning that teams never aligned on.
- Trust scar tissue: someone is carrying manual caveats because the official number already failed in public.
- Ownership gap: nobody clearly owns the replacement workflow, QA, or retirement path.

STEP 3: INSPECT THE MANUAL LOGIC

- What columns, filters, caveats, exclusions, or patches get added every cycle?
- Which of those edits reveal a real business rule the official reporting path still ignores?

STEP 4: CHOOSE THE NEXT MOVE

- Fix the metric definition first:
- Change the reporting cadence or operating surface:

- Add explicit caveat/confidence labeling:
- Escalate into a broader systems or governance fix:

MEETING SUMMARY

- Spreadsheet reviewed:
- Real decision being supported:
- Main root-cause bucket:
- First fix to make this week:
- Named owner for the replacement path:
- What will prove the spreadsheet can be retired: