

Source-of-Truth Audit Worksheet

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this sheet in a live working session to document which metric families matter first, which artifact wins today, which system should win going forward, who owns the answer, and what happens when systems disagree.

1. DEFINE THE AUDIT SCOPE

- Leadership workflow in scope: _____
- Metric families to audit first: _____
- Meeting this keeps breaking: _____
- Why the number matters now: _____

2. CURRENT WINNER ARTIFACTS

- Finance artifact that wins today: _____
- GTM or RevOps artifact that wins today: _____
- Spreadsheet or side export still changing the answer: _____
- System each artifact pulls from: _____

3. SOURCE-OF-TRUTH AUDIT LOG

- Metric family: _____
- Decision supported: _____
- Current winner artifact: _____
- Candidate system of record: _____
- Named owner: _____
- Exclusions or caveats: _____
- Confidence label: directional / decision-grade / board-grade

- Fallback if systems disagree: _____

- Unresolved conflict to settle next: _____

4. KEEP THE ROOM OUT OF A TOOLING FIGHT

- What is the metric actually for? _____

- What plain-English definition should the room use? _____

- Which system should win for that use case? _____

- Who can approve a definition or hierarchy change? _____

- What question are we tempted to ask about tools too early? _____

5. CLASSIFY THE NEXT MOVE

- Alignment problem: yes / no

- Foundation problem: yes / no

- Reporting cleanup problem: yes / no

- Real tooling gap after the operating model is clear: yes / no

- First concrete next step: _____

SUGGESTED NEXT ROUTES

- Use Three Teams, Three Numbers when multiple functions still defend different definitions or owner claims.

- Use Data Foundation when the business answer is clear but the warehouse, source logic, or reporting plumbing is still too brittle to carry it.