

## Source-of-Truth Maturity Worksheet

### Domain Methods

USE THIS WORKSHEET ON ONE RECURRING LEADERSHIP REPORTING WORKFLOW

Examples: weekly KPI review, monthly forecast pack, board revenue deck, or cross-functional reporting packet.

### WORKFLOW DEFINITION

- Reporting workflow being scored
- Primary audience
- Metric family or packet in scope
- Official system-of-record hierarchy today
- Named decision owner

### SCORE EACH DIMENSION FROM 1 TO 3

- System-of-record clarity: does everyone know which system wins and why?
- Definition control: is the metric definition explicit, approved, and protected from drift?
- Owner accountability: does one role have authority to settle changes and exceptions?
- Reconciliation discipline: is the recurring reconciliation path bounded and reviewable?
- Confidence labeling: is the number clearly directional, decision-grade, or board-grade?
- Fallback behavior: what happens when systems disagree or the official path fails?

### TOTAL SCORE AND MATURITY BAND

- 6 to 8 = Operationally reliable
- 9 to 13 = Partially defined but fragile
- 14 to 18 = Fragmented and political

## WORKING-SESSION NOTES

- Which dimension changes the answer in the room most often?
- Which spreadsheet, export, or side check is still acting like production infrastructure?
- Which owner or approval step is still fuzzy under pressure?

## NEXT MOVE

- Set the system-of-record hierarchy
- Rewrite the definition record
- Assign final owner authority
- Add confidence labels to the recurring packet
- Design the fallback rule before the next leadership cycle

## WHAT THIS WORKSHEET DOES NOT PROVE

- It does not prove every metric is correct
- It does not replace source-data inspection or model testing
- It does not mean one storage layer automatically became the source of truth