

The Single Source of Truth Blueprint

5 Phases from Chaos to Governed Metrics

Domain Methods

This lightweight PDF companion turns the article into an operating kit for RevOps, finance-adjacent, and data leaders who need governed revenue metrics without turning the process into a giant committee.

PHASE 1: AUDIT

- Inventory the 5-10 metrics leadership actually uses.
- List the reports, dashboards, spreadsheets, and manual adjustments.
- Name the systems of record currently assumed by each team.
- Document where trust breaks: timing, definitions, ownership, logic.
- Exit when the disagreement is visible instead of implied.

PHASE 2: ALIGN

- For each top metric, define the business question it supports.
- Write the canonical definition in plain language.
- Name the owner, system of record, and known exclusions.
- Record unresolved conflicts explicitly instead of hiding them.
- Exit when the room can explain the metric without jargon.

PHASE 3: ARCHITECT

- Decide where canonical logic will live.
- Separate raw, staging, business logic, and presentation layers.
- Set approval rules for metric changes and edge cases.
- Define confidence levels: directional, decision-grade, board-grade.
- Exit when the build has guardrails before code starts.

PHASE 4: BUILD

- Implement the approved logic in warehouse/dbt/reporting layers.
- Add tests, documentation, and a rollout plan.
- Publish official outputs and deprecate shadow reports.
- Exit when users trust the output enough to change a real decision.

PHASE 5: GOVERN

- Keep a metric definition log and named owners.
- Review definitions monthly or quarterly.
- Trigger re-review after pricing, GTM, or source-system changes.
- Escalate unresolved conflicts instead of editing definitions socially.
- Exit when the truth survives normal business change.

DEFINITION RECORD TEMPLATE

- Metric name
- Business question
- Canonical definition
- System of record
- Owner
- Known exclusions
- Confidence level
- Review trigger

QUARTERLY GOVERNANCE CHECKLIST

1. Did pricing, packaging, or GTM change?
2. Did any source system or integration change?
3. Did finance, sales, or RevOps add exception logic?
4. Are shadow reports reappearing?
5. Is the metric being used beyond its confidence level?

WHEN TO START WITH A DIAGNOSTIC

- If teams still disagree on what the number means, start with Three Teams, Three Numbers.
- If definitions are clear but the stack is brittle, move into Data Foundation.

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