

Two-Day Marketing Data Audit Worksheet

Use this lightweight worksheet to compare the numbers leadership uses before another quarter compounds the

1. Audit Scope

- Business decision being supported:
- Time window under review:
- Owner/facilitator:
- Teams/systems included:

2. Source Inventory

- Ad platforms:
- CRM reports/views:
- Warehouse/BI dashboards:
- Finance exports:
- Spreadsheets/manual workarounds:

3. Metric Comparison Table

Metric | Source | Current number | Time window | Owner | Caveat/manual adjustment

4. Trust-Break Review

- Where do definitions differ?
- Where does freshness/cadence break the workflow?
- Which number is being corrected manually before it reaches leadership?
- Which discrepancy could change budget, forecast, or board decisions?

5. Risk Classification

- Cosmetic: annoying but not decision-changing
- Reporting risk: creates recurring confusion/rework
- Decision risk: unsafe for budget, pipeline, revenue, or board reporting

6. Priority Fixes

List the 3-5 trust breaks to fix next, and name the owner and deadline for each.

If the biggest problem is attribution trust, start with Where Did the Money Go?.

If the problem is broader reporting and governance, the next step is Revenue Analytics.