

Warehouse Source-of-Truth Gap Audit

Domain Methods

HOW TO USE THIS AUDIT

Use this in a 30-minute leadership, RevOps, or analytics review when someone says the warehouse should already be solving the trust problem.

- Pick one high-stakes metric or recurring decision: pipeline, board revenue, CAC, forecast accuracy, margin by segment, or another number that still creates debate.
- Write down which artifact actually wins today when the meeting gets tense: CRM report, billing export, finance workbook, board deck adjustment, warehouse dashboard, or analyst spreadsheet.
- Score each section below as strong, partial, or weak. Partial is common. The goal is to expose the operating gap, not pretend the answer is binary.

SECTION 1: METRIC DEFINITION

- What is the exact business question this metric is supposed to answer?
- Which exclusions or timing rules matter most?
- Would marketing, sales, finance, and data describe this metric the same way in writing?

SECTION 2: AUTHORITY

- Which system should win if source records disagree?
- Who can approve a definition change?
- What artifact still overrules the warehouse in practice?

SECTION 3: RECONCILIATION DRIFT

- What changed recently in lifecycle stages, pricing, finance logic, or source capture?
- Did the warehouse model and downstream reporting keep up?
- Which caveat still lives in Slack, a board note, or a side spreadsheet?

SECTION 4: CONFIDENCE LEVEL

- Is this metric directional, decision-grade, or board-grade today?
- What specific gap prevents the next confidence level?
- Would you defend this number in a board meeting without verbal caveats?

SECTION 5: NEXT MOVE

- If the fight is cross-functional definition conflict, route it to Three Teams, Three Numbers.
- If the definition is clear but the warehouse, dbt, or source syncs are brittle, route it to Data Foundation.
- If both are true, sequence the alignment first and the rebuild second.

MEETING NOTES

- Metric or decision reviewed:
- Current winning artifact:
- Named owner:
- Biggest unresolved caveat:
- Confidence level today:
- Next review date: