

## Wrong Metric Definition Risk Review

### Domain Methods

#### WHAT THIS WORKSHEET IS FOR

Use this review when a metric looks complete but still creates argument, caveats, or bad decisions in leadership meetings. The goal is to decide whether the next fix is meaning, ownership, exclusions, confidence, or the data path itself.

#### 1. PICK ONE HIGH-STAKES METRIC

- Metric in scope: \_\_\_\_\_
- Meeting or decision where it is being used: \_\_\_\_\_
- Current owner of the business definition: \_\_\_\_\_
- Team most affected if the metric is wrong: \_\_\_\_\_

#### 2. WRITE THE DECISION SENTENCE

Complete this before touching the dashboard or model:

- This metric is safe to use for: \_\_\_\_\_
- It includes: \_\_\_\_\_
- It excludes: \_\_\_\_\_
- It should not be used for: \_\_\_\_\_

#### 3. LOOK FOR DEFINITION-RISK SIGNALS

Check every signal that is true today:

- Same metric label appears in multiple meetings with different meanings.
- Finance, RevOps, marketing, sales, or data would define it differently.
- Exclusions are undocumented, inherited, or only known by one person.
- The metric rewards a behavior leadership would not want if named plainly.
- The dashboard is trusted mostly because it looks complete and polished.
- Caveats are explained verbally but not carried with the metric itself.

#### 4. CLASSIFY THE FIRST FIX

- Meaning problem: the metric answers the wrong business question. yes / no
- Ownership problem: no one has authority over the definition. yes / no
- Exclusion problem: costs, stages, refunds, discounts, or exceptions change the meaning. yes / no
- Confidence problem: the metric is useful but overused for higher-stakes decisions. yes / no
- Data-path problem: the definition is clear but the systems cannot support it. yes / no

#### 5. ASSIGN THE CONFIDENCE LABEL

- Directional: useful for trend discussion, not commitments. yes / no
- Decision-grade: safe for the specific operating decision named above. yes / no
- Board-grade: safe for leadership or board use with clear owner and caveats. yes / no
- Not safe yet: do not use until definition, exclusions, or data path is fixed. yes / no

#### 6. DECIDE WHAT CHANGES BEFORE THE NEXT MEETING

- Definition owner to confirm: \_\_\_\_\_
- Exclusions or rules to document: \_\_\_\_\_
- Alternate labeled view to preserve: \_\_\_\_\_
- Caveat or confidence label to show with the metric: \_\_\_\_\_
- First technical/data fix, if the definition is already settled: \_\_\_\_

#### SUGGESTED NEXT ROUTES

- Use Three Teams, Three Numbers when marketing, sales, finance, and data are using the same metric label for different operating claims.
- Use Data Foundation when the business definition is clear but warehouse logic, source-system rules, or reporting pipelines cannot carry it reliably.