Revenue Data Trust Scorecard

For RevOps, CRM, and marketing ops consultants evaluating whether a client needs a technical revenue data trust sprint.

How to use this scorecard

Use this before recommending a CRM cleanup, attribution rebuild, dashboard project, warehouse sync, or RevOps process change. The goal is to separate process problems from data trust problems.

Score each category from 0 to 3.

- 0: Not a current issue
- 1: Mild issue, local workaround exists
- 2: Material issue, affects decisions or team trust
- 3: Critical issue, blocks reporting, forecasting, attribution, or executive confidence

If the total score is 8 or higher, the client likely needs a technical data trust sprint before more process work will stick.

1. Source-of-truth clarity

Score this category when different teams trust different systems.

Questions to ask:

- Which system is treated as source of truth for pipeline, bookings, revenue, campaign attribution, customer status, and expansion?
- Does finance reconcile revenue outside the CRM?
- Does marketing use campaign or attribution numbers that sales disputes?
- Are lifecycle stages defined in one place or interpreted differently by team?
- Can the team explain how a number moves from operational system to executive dashboard?

High-risk signals:

- Forecast reviews turn into debates about definitions.
- CRM exports are manually patched before leadership meetings.
- Teams maintain parallel spreadsheets because dashboards are not trusted.
- A metric has different values in CRM, BI, finance, and marketing tools.

2. Sync and integration reliability

Score this category when records move through brittle or invisible paths.

Questions to ask:

- Which systems write to the same fields?
- Are syncs monitored, or does the team discover failures through bad reports?
- Do Zapier, Make, reverse ETL, CSV imports, enrichment tools, and manual edits touch the same objects?
- Are failures retried, logged, and owned?
- Does the team know which system wins during conflicts?

High-risk signals:

- Duplicate records keep returning after cleanup.
- Enrichment overwrites manually corrected data.
- Customer status lags reality by more than one reporting cycle.
- Lead source or lifecycle fields change without audit history.

3. Reporting definition quality

Score this category when dashboards exist but decisions still stall.

Questions to ask:

- Are metric definitions written down?
- Is SQL, dbt, BI logic, or spreadsheet logic the actual source of a metric?
- Do dashboards include freshness, owner, and source notes?
- Can someone trace a dashboard value back to raw records?
- Are filters and exclusions consistent across reports?

High-risk signals:

- Board metrics require manual explanation every cycle.
- Teams duplicate dashboards instead of fixing shared definitions.
- SQL snippets, spreadsheet formulas, and BI calculated fields all encode business logic.
- Nobody knows why a dashboard changed.

4. CRM process dependency

Score this category when the operating process depends on data that may not be reliable.

Questions to ask:

- Which handoffs break when CRM fields are stale or incomplete?
- Which automations depend on lifecycle, lead source, ICP, owner, territory, or customer status?
- Which process changes will fail if data trust is not fixed first?
- Does the client need better process, better data, or both?

High-risk signals:

- Sales routing is disputed.
- Marketing attribution does not match pipeline reality.
- Customer success does not trust expansion or health signals.
- RevOps is blamed for numbers that are actually system integration issues.

Recommended sprint scope

A strong Revenue Data Trust Sprint should produce:

- A map of the current reporting path
- A list of trust gaps and their impact
- A sync and ownership matrix
- A prioritized repair plan
- A SQL, dbt, or dashboard implementation path
- A prototype or proof run when the systems are ready

Decision rule

Recommend a technical sprint when at least two of these are true:

- The client is debating numbers more than acting on them.
- A CRM/process recommendation depends on data the team does not trust.
- Syncs or automations touch revenue-critical fields without monitoring.
- The next RevOps project needs SQL, dbt, BI, API, or warehouse depth.
- The client needs an implementation plan before funding cleanup or dashboard work.

NEXT STEP

Bring one client scenario to a partner fit call.

20-min call. Bring the client situation, the technical question, and the decision that needs to happen next. Leave with a written go/no-go — no slide deck.

Book a partner fit call → or email info@mldeep.io