

Independent executive-number review

Executive Number Risk Self-Score

Is this number ready to reach the board, the lender, or the deal?

Pick one number your team is most likely to rely on this quarter: a forecast, a dashboard metric, an AI-written board narrative, or a deal-critical figure. Score that single number against the ten statements below. Mark Yes (0 risk points), Partly (1), or No (2) for each. Add the points. The band at the end tells you whether the number is safe to present as built.

This is a self-assessment, not a review. It is designed to surface where a number is weak, not to fix it.

#	Can you confidently affirm this about the number?	Response (risk points)		
1	Source traceability. I can trace this number from the dashboard or report back to the underlying source system, and show the exact query or logic that produced it.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
2	Independent build check. Someone other than the person who built this number has verified the logic, not just glanced at the output.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
3	Stable definition. What this metric counts, what it excludes, and its time grain are written down, and have not silently changed between periods.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
4	Grain consistency. The number does not blend grains or populations in a way that flatters it, such as mixing bookings with recognized revenue, or registered with active users.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
5	Forecast drivers. For any forecast, I can name the three drivers that move it most, and I know whether manual overrides or adjustments sit on top of the model output.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
6	Override visibility. There are no hidden hardcoded values, spreadsheet patches, or one-off adjustments buried between the source data and the final number.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
7	Reconciliation. This number ties back to the system of record (GL, billing, CRM) within a known, explainable tolerance.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
8	AI traceability. For any AI-generated summary or metric, I can trace each claim to the data behind it, and I know what the model was actually given.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
9	Spend-to-value link. For the BI, cloud, analytics, or AI spend feeding this number, I can name the decision it improves. I am not paying for tooling that produces numbers no one trusts.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)
10	Defensibility under questioning. If a board member, lender, or buyer challenged this number in the room, the owner could defend how it was built without saying the system just produces it.	<input type="checkbox"/> Yes (0)	<input type="checkbox"/> Partly (1)	<input type="checkbox"/> No (2)

Total risk score: _____ / 20

Read your score

0 - 4 LIKELY DEFENSIBLE	The set looks sound. Spot-check the single highest-stakes number against source, then move on. Re-score whenever the definition, the build owner, or the underlying system changes.
5 - 9 MATERIAL EXPOSURE	At least one number here is not defensible as built. Route it to an outside review before the next board, budget, lender, or deal cycle, while there is still time to fix it quietly.
10 - 20 HIGH EXPOSURE	Do not present, fund, or transact on these numbers until they have been independently tested. This is the exact failure pattern that surfaces late, in the room, at the worst possible time.

The one move that matters

Name the single statement above you were least able to affirm. That is the number to bring to a scoped review first. You do not have to send anything confidential to start: a short, non-confidential note about the decision, the deadline, the artifact type, and the concern is enough to scope the work.

Request a confidential review → forecastintegritypartners.com

AI can accelerate analysis. It cannot replace outside review.