PREPARED FOR

Construction operations business, 100–1,000 accounts



Submitted date 30 Oct 2026 100–1,000 accounts

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Unified Foundation — 86 B

- Bookings with no product or no owner — CP-05
- The words in the definitions were written down — CP-07
- Enough history to follow a customer — CP-01
  12 months or more gives a buyer enough history to trust the trends.
- Months where the whole book went quiet — CP-02
- A customer goes quiet without a churn mark — CP-03

6 more

Audit-Grade Accuracy — 83 B

- The bridge and the KPI table agree — CR-08
- Headline KPIs can be reproduced — CR-07
- Product and segment totals add up — CR-09
- Duplicate dollars that break the tie — CR-10
- The bridge foots on its own — CR-01

6 more

Cohort-Centric — 100 A+

- Customers have a start date — CO-01
- The start date matches the first revenue month — CO-02
- Too many customers share one start month — CO-03
- A returning customer kept the same key — CO-04
- Contract end dates exist and fall after the start — CO-05

2 more

Multi-Dimensional — 77 C+

- One owner does not hold the book — SG-06
  One owner under 15% of the book, and unassigned under 2%.
- Those tags actually cover the book — SG-02
- The same idea is spelled one way — SG-04
- The cuts a buyer expects are present — SG-01
- A tag is a category, not free text — SG-03

2 more

Anomalies — 95 A-

A sentence in the talking points does not match the file	AN-09
Duplicate rows	AN-06
One customer spikes for a month and reverts	AN-01
A customer drops to zero and comes back unmarked	AN-02
One month moves the whole book	AN-03

5 more

What this file says

Your customer rows add up to the annual recurring revenue you report, exactly, in every reported period. Your bridge rebuilds fully from those same rows. Customer start dates, contract dates and returning customers all hold up, so the Cohort-Centric Design pillar came through clean. The grade is B (overall 87.8) at detail level 3.

A buyer would see two gaps first.

Ownership. 21% of annual recurring revenue has no owner, and the largest owner holds 30.3%. A buyer would ask: *What happens to the revenue held by the largest owner, and who covers the accounts with no owner?*

Churn. Your KPI table reports churn under 1% for 2024 and 2025. Your bridge implies 9.68% and 20.93%. A buyer would ask: *Why do the KPI table and the bridge disagree on churn or retention?*

For context, here are the three largest one-month moves in the book, each led by a single account: January 2025 $363K (8.5%), August 2024 $232K (6.4%), and January 2024 $218K (7%). They sit within the normal range for this file, so we did not flag them.

What to do first

These changes would move your grade the most, in order.

- Assign an owner to $935K of ARR. 30 active accounts have no owner. The largest owner holds 30.3% of ARR. Owner coverage drives two checks: how well your tags cover the book, and whether one owner holds too much of it. The least-covered tag field is parent. Cited as CP-05. This would lift your Multi-Dimensional Insights score toward a B.
- Remove 6 row-level defects. There are 6 duplicate rows, and the same 6 rows keep the totals from matching. Cited as AN-06. Fixing them lifts your Anomalies and Audit-Grade Accuracy scores together.
- Restate the KPI table from the bridge. We could not reproduce your churn rate from the customer rows. For 2024 the table reports under 1% where the bridge implies 9.68%. For 2025 it reports under 1% where the bridge implies 20.93%. Add one line of definition for each metric. Cited as AN-09. This would lift your Audit-Grade Accuracy score toward a B.
- Add a definitions tab. Write one line each for ARR, NRR, GRR, churn, new, expansion, reactivation and cohort. With written definitions, a buyer can reproduce the KPI table. Cited as CP-07. This also moves you closer to diligence-ready.
- Normalize 2 tag fields. In 2 fields, the same value is spelled more than one way, and the spellings

differ only in capitals or spaces. One cleanup pass fixes them. Cited as SG-04. This would lift your Multi-Dimensional Insights score by a letter.

Where the grade comes from

We read 2 files, 8 sheets and 11,656 data rows. The data runs from January 2023 through December 2025, which is 36 months. The form said 100 to 1,000 customers, and the file billed 180 accounts. The form said under 5,000,000 ARR, and ARR in the file's last month is $4.5M.

We ran 40 of 42 checks. 2 could not be checked, and they are listed below.

- Unified, Finance-Approved Foundation: 86.5 (B)
- Audit-Grade Accuracy: 83.5 (B)
- Cohort-Centric Design: 100 (A+)
- Multi-Dimensional Insights: 77.5 (C+)
- Anomalies: 95.4 (A-)

Each check

Below is each check that found something, grouped by pillar. The short code is only a citation, in case you want to look the check up.

Unified, Finance-Approved Foundation

Bookings with no product or no owner

Cited as CP-05.

We checked how much of your latest revenue has no product and how much has no owner. Every account has a product. Ownership is the gap: 30 accounts carrying $935K, or 21% of revenue, have no owner. Buyers cut the book by owner, so these blanks are the first thing they will hit.

Next step. Assign a product and an owner to the revenue that has none before your next export.

The words in the definitions were written down

Cited as CP-07.

We looked for the standard terms in your definitions. We checked that each term is written down, not that it matches your numbers. 5 of the 9 terms we expect are there. A buyer would ask: *Where are the written definitions for the metrics your summary reports?*

Next step. Write a short definition for each headline metric your summary uses, so a buyer reads the same meaning you do.

Came through clean: Enough history to follow a customer (CP-01); Months where the whole book went quiet (CP-02); A customer goes quiet without a churn mark (CP-03); Billing rows with revenue and no customer identity (CP-04); The product file covers the same months as billing (CP-06); Billed customers appear on the customer list (CP-08); One account, one key (CP-10).

Audit-Grade Accuracy

The bridge and the KPI table agree

Cited as CR-08.

We worked out churn and net retention from your bridge and compared them with your KPI table. We tested 6 figures, and 2 disagree. Both are churn: one for 2024 and one for 2025. A buyer would ask: *Why do the KPI table and the bridge disagree on churn or retention?*

> **Next step. Make the KPI table match what the bridge implies, or show the definition that explains the difference.**

Headline KPIs can be reproduced

Cited as CR-07.

We tried to rebuild each KPI in your summary from the customer rows, using the standard definition. We rebuilt 5 KPIs, and 1 of them, the churn rate, did not match.

> **Next step. Either change the KPI to the figure the customer rows produce, or write the definition that makes your printed figure correct.**

Product and segment totals add up

Cited as CR-09.

We added up the product and segment rows in your summary and compared the result with the summary total and with ending ARR. In 1 period, 2024, the rows do not add up to the total.

> **Next step. Make the product and segment subtotals add up to the summary and to ending ARR.**

Duplicate dollars that break the tie

Cited as CR-10.

We measured the duplicate dollars that would make your customer rows match your summary once they are removed. 6 duplicate rows carry $229K, which is 0.2% of revenue. A buyer would ask: *Which duplicate rows are keeping the totals from matching?*

> **Next step. Delete or net the duplicate rows that keep the totals from matching, then export again.**

Came through clean: The bridge foots on its own (CR-01); Customer detail matches the bridge ending (CR-02); Movements rebuild from the customer rows (CR-03); Product lines tie to billing (CR-04); The amount matches the status word (CR-05); Statuses tell a legal story over time (CR-06).

Cohort-Centric Design

Came through clean: Customers have a start date (CO-01); The start date matches the first revenue month (CO-02); Too many customers share one start month (CO-03); A returning customer kept the same key (CO-04); Contract end dates exist and fall after the start (CO-05); Retention looks earned, not just unexpired (CO-06); A trailing year has a year of history behind it (CO-07).

Multi-Dimensional Insights

One owner does not hold the book

Cited as SG-06.

We measured how much of your latest revenue sits with the largest owner, and how much has no owner. The book is split across 3 owners. The largest holds $1.3M, a 30.3% share. A buyer would ask: *What happens to the revenue held by the largest owner, and who covers the accounts with no owner?*

> **Next step. Reassign the largest concentrations and fill in the missing owners, so the book does not depend on one person.**

Those tags actually cover the book

Cited as SG-02.

For each tag, we measured how much of your latest revenue sits on accounts that have a real value. Across the 6 tags you carry, average coverage is 79.8%. Parent is the weakest. A buyer would ask: *Why are so many accounts missing tag values, and which ones matter most?*

> **Next step. Fill in the blank tags on the accounts that carry the most revenue, starting with product and owner.**

The same idea is spelled one way

Cited as SG-04.

We grouped tag values that are the same once capitals and spaces are ignored. 2 tag fields, segment and status, have more than one spelling of the same value. A buyer would ask: *Which spellings of the same category can be merged?*

> **Next step. Pick one spelling for each category and use it throughout the file.**

Came through clean: The cuts a buyer expects are present (SG-01); A tag is a category, not free text (SG-03); Parent accounts are used (SG-05).

Anomalies

Duplicate rows

Cited as AN-06.

We counted duplicate billing rows, duplicate product rows and duplicate customer rows. There are 6 duplicate rows carrying $229K, and 5 of them sit in the revenue rows. A buyer would ask: *Why are there duplicate rows in the file?*

> **Next step. Remove the duplicates, so there is one record per account and month.**

A sentence in the talking points does not match the file

Cited as AN-09.

We tested the numbers quoted in your talking points against figures we can produce from the file. Of the 4 we tested, 1 did not hold, and it is the churn rate. A buyer would ask: *Which talking points can the customer rows actually back up?*

Next step. Rewrite or remove the sentences that the customer rows cannot back up.

Came through clean: One customer spikes for a month and reverts (AN-01); A customer drops to zero and comes back unmarked (AN-02); One month moves the whole book (AN-03); Amounts do not match the file's own format (AN-05); The book sits in a few customers (AN-07); Prices did not move where an escalator was promised (AN-08).

What we could not check

- A new product line copies a price the account already had (AN-04). This check only runs in a month that moved the whole book, and this file has no such month.
- Tags stay stable over the year (SG-07). Your file stores one tag per account, not one per month, so we cannot see whether tags changed over time. To make this checkable, export each tag as of each month.

How this was graded

Each pillar carries a weight in the grade: Unified, Finance-Approved Foundation 30%, Audit-Grade Accuracy 25%, Cohort-Centric Design 15%, Multi-Dimensional Insights 15%, Anomalies 15%. The letter bands are A 93 or above, B 80 or above, C 60 or above, D 45 or above.

We read the bridge as monthly amounts added up. Rules version e1ed077ee33b.

On readiness, the file is not yet decision-ready or diligence-ready, and it is AI-ready. The letter comes from the five pillar scores. Readiness is a separate test and does not change the letter. The two ownership gaps are what currently hold back decision-ready. Those same gaps, plus the Audit-Grade Accuracy score, hold back diligence-ready.

Next step

The Strategic Revenue Intelligence Assessment walks through these findings with a FinQore analyst. It shows what a decision-ready and diligence-ready cube looks like for your business.

Your files are retained in FinQore infrastructure for the stated retention period and deleted on request.