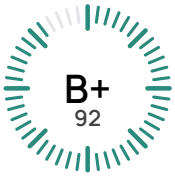
PREPARED FOR

Cybersecurity business, 1,000+ accounts



Submitted date 30 Oct 2026 1,000+ accounts

Read this report online

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 100 A+

- 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 account totals CR-04
- The amount matches the status word CR-05

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 100 A+

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	
A new product line copies a price the account already had Mirrored prices on under 10% of the accounts that gained a product.	AN-04	**Not checked**
Odd or negative amounts	AN-05	

5 more

What this file says

Start with what holds up. 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. A buyer can trace every reported total back to the customers behind it, and most buyers test that first.

The grade is B+ (92.6 overall), read at detail level 3. Three of the five pillars come through clean. The gaps are about who owns the revenue and how fully the book is tagged. They are not about whether the numbers are right.

A buyer would ask two things first:

- Who owns the 25.5% of annual recurring revenue that has no owner?
- What happens to the revenue held by the largest owner, and who covers the accounts with no owner?

We also looked at the months that moved your total revenue the most. Each was led by a single customer: January 2025, $7.0M (6.7%); January 2024, $5.9M (7.9%); March 2023, $2.8M (5.4%). A buyer may still ask about them, so a one-line note on each will help.

What to do first

These changes would move your grade the most.

- Assign an owner to $28.9M of ARR. 1,085 active accounts have no owner. Your largest owner holds 25.2% of ARR. The least-filled tag field is parent. Owner coverage drives two of your Multi-Dimensional Insights checks: how well your tags cover the book, and whether one owner holds too much of it. Cited as CP-05. This would lift your Multi-Dimensional Insights score toward a B.
- Add a definitions tab. Write one line each for ARR, NRR, GRR, churn, new, expansion, reactivation and cohort. Once the definitions are written down, anyone can rebuild your KPI table and get the same answer. Cited as CP-07. This lets us check your definitions and moves you closer to being ready for diligence.
- Clean up 2 tag fields. Two fields carry the same value spelled with different capitals or spaces. One cleanup pass removes them. Cited as SG-04. This would lift your Multi-Dimensional Insights score by a letter.
- Send the inputs we could not check. Add the tables listed under "What we could not check" so every check can run. More of your file gets graded, and less is assumed.

- Re-grade after each month-end close. A monthly re-grade catches broken ties, duplicates and status drift before they reach the board pack. This protects your Audit-Grade Accuracy score.

Where the grade comes from

We read 2 files with 8 sheets and 393,679 data rows. The data runs from January 2023 through December 2025, which is 36 months. You told us you have 1,000 to 10,000 customers, and the file billed 5,000 accounts. You told us your ARR is 50,000,000 to 150,000,000, and the file's ARR in its last month is $113.1M.

We ran 40 of 42 checks. The other 2 could not run, and we list them below.

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

Each check

Below are the checks that found something, grouped by pillar. Each one carries a short code you can use to look it up.

Unified, Finance-Approved Foundation

Bookings with no product or no owner

Unified, Finance-Approved Foundation. Cited as CP-05, owner.

We checked how much of your latest revenue has no product and how much has no owner. The gap is owners. In this file, 1,085 accounts carry 25.5% of revenue, $28.9M, with no owner. Buyers cut the book by owner, so a buyer will ask who looks after that revenue today.

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

Unified, Finance-Approved Foundation. Cited as CP-07.

We looked for the standard terms, such as ARR, NRR and churn, in your definitions. This check confirms that the terms are written down. It does not test whether they match your numbers. We found 5 of the 9 we look for. A buyer will ask where the written definitions are 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); Bookings with no product or no owner, product side (CP-05); 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

Every check here 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); Headline KPIs can be reproduced (CR-07); The bridge and the KPI table agree (CR-08); Product and segment totals add up (CR-09); Duplicate dollars that break the tie (CR-10).

Cohort-Centric Design

Every check here 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

Multi-Dimensional Insights. Cited as SG-06.

We measured how much of your latest revenue sits with the largest owner, and how much has no owner. Your book is split across 3 owners. The largest holds $28.5M, or 25.2%. A buyer will 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

Multi-Dimensional Insights. Cited as SG-02.

For each tag, we measured how much of your latest revenue sits on accounts that have a real value. You have 6 tags, and on average they cover 79.1% of revenue. Owner and parent are the ones with blanks. A buyer will ask why so many accounts are 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

Multi-Dimensional Insights. Cited as SG-04.

We grouped tag values that are the same once capitals and spaces are ignored. Two fields, segment and status, use more than one spelling for the same value. A buyer will 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

Every check here 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); Duplicate rows (AN-06); The book sits in a few customers (AN-07); Prices did not move where an escalator was promised (AN-08); A sentence in the talking points does not match the file (AN-09).

What we could not check

- A new product line copies a price the account already had (AN-04): this check runs only on a month that moved the whole book, and your file has none, so it had nothing to test.
- Tags stay stable over the year (SG-07): your file stores one tag per account, not one per month. If you export each tag as of each month, this check can run.

How this was graded

Each pillar counts for a set share of the grade: Unified, Finance-Approved Foundation 30%, Audit-Grade Accuracy 25%, Cohort-Centric Design 15%, Multi-Dimensional Insights 15%, Anomalies 15%. Letter cut-offs: A 93 or above, B 80 or above, C 60 or above, D 45 or above.

We read your bridge by adding up the monthly amounts. Rules version e1ed077ee33b.

We also ran a separate readiness test. It does not change the letter. You are not yet ready for decisions, because the two owner gaps above are still open. You are not ready for diligence either. That needs the owner gaps closed, plus unit or price data, or payments. The file is ready for AI.

Next step

In the Strategic Revenue Intelligence Assessment, a FinQore analyst walks through these findings with you. The assessment also shows what a revenue model ready for decisions and diligence looks like for your business.

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