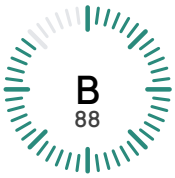
PREPARED FOR

Life-sciences software business, under 100 accounts



Submitted date 30 Oct 2026 under 100 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 — 85 B

- 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
- The bridge foots on its own — CR-01
- Customer detail matches the bridge ending — CR-02

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

What reconciles: your customer rows add up to the annual recurring revenue you report exactly in every reported period, and your bridge rebuilds from those rows with nothing unexplained. The grade is B (overall 88.2) at detail level 3. A buyer would ask these first: What happens to the revenue held by the largest owner, and who covers the accounts with no owner? Who owns the 22.5% of annual recurring revenue with no owner? The three largest moves, in one list: January 2025 $4.0M (8.1%), led by Account 33; January 2024 $3.7M (10.3%), led by Account 44; March 2024 $2.9M (7.1%), led by Account 47.

What to do first

These are the changes that would move your grade the most.

- Assign an owner to $12.9M of ARR - 20 active accounts have no rep. The top rep holds 29.5% of ARR. The least-covered tag field is parent. Owner coverage drives two of your Multi-Dimensional Insights checks: how well the 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.
- Remove 6 row-level defects - 6 duplicate rows, 6 flagged rows. Cited as AN-06. This would lift your Anomalies and Audit-Grade Accuracy scores together.
- Restate the KPI table from the bridge - Contradicting the bridge: churn_rate 2024: reported <1%, bridge implies 2.2%, churn_rate 2025: reported <1%, bridge implies 3.45%. Add one line of definition per metric. Cited as AN-09. This would lift your Audit-Grade Accuracy score toward a B.
- Add a definitions tab - One line each for ARR, NRR, GRR, churn, new, expansion, reactivation and cohort. Definitions make the KPI table reproducible. Cited as CP-07. This lets us check your definitions and moves you closer to diligence-ready.
- Normalize 2 tag fields - 2 fields carry case or whitespace variants of the same value. One pass of normalization removes them. Cited as SG-04. This would lift your Multi-Dimensional Insights score by a letter.

Where the grade comes from

Inputs: 2 file(s), 8 sheet(s), 6,505 data rows. Data window: January 2023 through December 2025 (36 months). The form said under 100 customers; the file billed 80 accounts. The form said 20,000,000 to 50,000,000 ARR; the file's ARR in its last month is $57.3M, outside that band. Hazards handled: none. Checks run: 40 of 42; 2 could not be checked (listed below).

- Unified, Finance-Approved Foundation: 86.5 (B)
- Audit-Grade Accuracy: 85 (B)
- Cohort-Centric Design: 100 (A+)
- Multi-Dimensional Insights: 77.5 (C+)
- Anomalies: 95.4 (A-)

Each check

Below, each check that found something, grouped by pillar. The short code is a citation, in case you want to look the check 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. Buyers cut the book by product and by owner, so blanks get in the way.

In this file: accounts 20, revenue with no owner 22.5%, unassigned revenue $12.9M.

> **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. We check that they are written down, not that they match your numbers.

In this file: definitions found 5, definitions expected 9.

> **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 (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

The bridge and the KPI table agree

Audit-Grade Accuracy. Cited as CR-08.

We worked out churn and net retention from your bridge and compared them with your KPI table.

In this file: contradiction count 2, KPIs tested 6.

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

Duplicate dollars that break the tie

Audit-Grade Accuracy. Cited as CR-10.

We measured the duplicate dollars that, once removed, would make your customer rows match your summary.

In this file: duplicate rows 6, defect $5.9M, defect usd 0.4%.

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

Product and segment totals add up

Audit-Grade Accuracy. Cited as CR-09.

We added up the product or segment rows in your summary and compared the result with the summary total and with ending ARR.

In this file: periods that do not match 1.

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

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).

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

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.

In this file: owners 3, largest owner's revenue $16.9M, largest owner's share 29.5%.

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.

In this file: average tag coverage 79.6%, tags found 6.

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, and counted how many spellings each one has.

In this file: tags found 2.

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

Anomalies. Cited as AN-06.

We counted duplicate billing rows, duplicate product rows and duplicate customer rows.

In this file: arr rows 5, defect $5.9M, duplicate rows 6.

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

Anomalies. Cited as AN-09.

We tested the numbers quoted in your talking points against figures we can produce from the file.

In this file: KPIs we could not reproduce 1, KPIs tested 4.

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): Not checked
- Tags stay stable over the year (SG-07): Not checked

How this was graded

Weights: Unified, Finance-Approved Foundation 30%, Audit-Grade Accuracy 25%, Cohort-Centric Design 15%, Multi-Dimensional Insights 15%, Anomalies 15%. Bands: A 93 or above, B 80 or above, C 60 or above, D 45 or above.
Bridge read as: monthly amounts added up. Rules version e1ed077ee33b.
Readiness: decision-ready not yet, diligence-ready no, AI-ready yes.
The letter comes from the five pillar scores. Readiness is a separate test and does not change the letter.

→ Next step

The Strategic Revenue Intelligence Assessment walks through these findings with a FinQore analyst and 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.