

PREPARED FOR

Restaurant technology business, 100–1,000 accounts



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Unified Foundation

87 B+

Enough history to follow a customer

CP-01 100

Counts how many consecutive months of billing exist. Later checks of gaps, cohorts, and trailing retention are only as strong as this run of history.

Months where the whole book went quiet

CP-02 100

Finds months between the first and last period where nobody was billed. That is a hole in the calendar, shared by every account.

A customer goes quiet without a churn mark

CP-03 100

Finds an account that skips an interior month while it was not marked churned and did not come back as a reactivation.

Revenue with no customer behind it

CP-04 100

Finds billing rows with no account, or an account that is not on the customer list.

Bookings with no product or no owner

CP-05 65

Measures how much of the latest book has no product, and how much has no owner.

The product file covers the same months as billing

CP-06 100

Asks whether the product-line file contains the same account-months as the billing file. The dollar tie between those files is a separate check.

The words in the definitions were written down

CP-07 56

Looks for the standard terms in the definitions text. It does not test whether those words match the numbers.

Billed customers appear on the customer list

CP-08 100

Measures how many billed account keys appear on the customer master.

Audit-Grade Accuracy

100 A+

The bridge foots on its own

CR-01 100

Checks that beginning plus movements equals ending, and that one period hands the next its ending balance.

Customer detail matches the bridge ending

CR-02 100

Compares ending ARR added up from the customer file with the ending the bridge prints, period by period.

Movements rebuild from the customer rows

CR-03 100

Rebuilds new, expansion, contraction, churn, and reactivation from the customer rows and compares them with the movements the bridge prints.

Product lines tie to billing

CR-04 100

Compares product-line dollars with billing dollars for the same account and month.

The amount matches the status word

CR-05 100

Flags a churned row that still has revenue, and a live row whose amount is zero.

Statuses tell a legal story over time

CR-06 100

Checks that the first status is new, that a reactivation follows a churn, and that revenue does not resume after churn without a reactivation.

Headline KPIs can be reproduced

CR-07 100

Tries to reproduce each reported KPI from the customer file under a standard definition.

The bridge and the KPI table agree	CR-08	100
Derives churn and net retention from the bridge and compares them with the KPI table.		
Product and segment totals add up	CR-09	100
Adds product or segment summary rows and compares them with the summary total and with ending ARR.		
Duplicate dollars that break the tie	CR-10	100
Measures duplicate dollars whose removal would make the detail match the summary.		
Cohort-Centric		100 A+
Customers have a start date	CO-01	100
Measures how many accounts have a start or cohort date that can be read.		
The start date matches the first revenue month	CO-02	100
Compares each account's start date with the first month it shows revenue.		
Too many customers share one start month	CO-03	100
Measures the largest share of accounts that share one start month. A shared month is usually a loading pattern, not a real cohort.		
A returning customer kept the same key	CO-04	100
Splits reactivations that kept the same account key from new keys whose name matches an account that churned recently.		
Contract end dates exist and fall after the start	CO-05	100
Measures how many accounts have an end date, and whether that end date falls on or after the start.		
Retention looks earned, not just unexpired	CO-06	100
Flags a year where almost nobody left and no contracts end, which can make retention look better than the contracts support.		
A trailing year has a year of history behind it	CO-07	100
Asks whether a full year of history exists before the first period used in a trailing-twelve-month metric.		
Multi-Dimensional		78 B-
The cuts a buyer expects are present	SG-01	100
Counts how many of the useful tags - product, segment, region, owner, and the rest - exist on the master or the lines.		
Those tags actually cover the book	SG-02	55
For each tag, measures how much of the latest book sits on accounts with a real value.		
A tag is a category, not free text	SG-03	100
Flags a tag whose values are mostly unique, or mostly one-off.		
The same idea is spelled one way	SG-04	80
Groups tag values that match once case and spacing are removed, and scores how many spellings each idea has.		
Parent accounts are used	SG-05	100
Asks whether a parent field is present and whether any account points at a different parent.		
One owner does not hold the book	SG-06	30
Measures the top owner's share of the latest book and the share with no owner.		
Tags stay stable over the year	SG-07	Not checked
Would measure how often a tag changes for the same account across a year. The file stores one tag per account, not one per month, so this cannot be scored yet.		
Anomalies		100 A+
One customer spikes for a month and reverts	AN-01	100
Finds one account whose book jumps for a single month and then returns to where it was.		
A customer drops to zero and comes back unmarked	AN-02	100
Finds one account that goes to zero for a run of months and then returns, without a churn mark and a reactivation mark.		
One month moves the whole book	AN-03	100
Flags a month whose change in total book is large against the file's own typical month, and splits that change by product, movement, and new versus existing accounts.		
A new product line copies a price the account already had	AN-04	Not checked
Inside a month that moved the whole book, looks at accounts that gained a product and asks whether that product's price mirrored a product they already had.		

Amounts do not match the file's own format	AN-05	100
Finds amounts whose decimal places, or whose round shape, differ from the pattern of the table they sit in, plus negative amounts.		
Duplicate rows	AN-06	100
Counts duplicate billing rows, duplicate product rows, and duplicate master rows.		
The book sits in a few customers	AN-07	100
Measures the largest customer and the top customers as a share of the latest book, including inside each product.		
Prices did not move where an escalator was promised	AN-08	100
Reports how many continuing accounts had an unchanged book between the last two year-ends. It is informational unless the definitions promise a price increase.		
A sentence in the talking points does not match the file	AN-09	100
Tests quantified sentences in the talking points against figures the file can produce.		

What this file says

The customer detail matches the reported ARR exactly in every reported period. The ARR bridge rebuilds from the customer rows using the monthly sum convention, with nothing left unexplained. The overall grade is A (composite 93.4) at tier 3.

The open items are about ownership and labeling, not arithmetic. Every booking carries a product: 0% of ARR is missing a product. The gap is the owner field. A buyer would ask these questions first:

- Who is accountable for the 20.8% of ARR that has no owner?
- With the top rep holding 30.3% of ARR, how much of the book depends on one relationship?

What to do first

These changes move the grade, in order of effect. Each one points to the check it affects, and those checks are described further down.

- Assign an owner to \$2.3M of ARR. 42 active accounts have no rep, and the top rep holds 30.3% of ARR. The parent field has the least coverage of any tag. Filling in owners improves two checks: whether those tags actually cover the book, and whether one owner holds the book. This moves Multi-Dimensional Insights toward B.
- Add a definitions tab. Write one line each for the terms that are not yet defined: MRR, GRR, new, and reactivation. They would join the existing definitions of ARR, NRR, churn, expansion, and cohort. With written definitions, a buyer can rebuild the KPI table on their own.
- Normalize 2 tag fields. Segment and status each contain case or spacing variants of the same value. One clean-up pass removes them. This moves Multi-Dimensional Insights up one band.
- Send the inputs a diligence review expects. The diligence-ready view is missing a units-or-price table or a payments table. A monthly history of tags would also let the check on whether tags stay stable over the year run. Both steps increase the share of the file that is graded rather than 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. It also keeps Audit-Grade Accuracy where it is.

Where the grade comes from

Inputs: 2 file(s), 8 sheet(s), 14,575 rows. Hazards handled: none.
Checks run: 39 of 41. The 2 that could not be run are listed below.

- Unified, Finance-Approved Foundation: 87.3 (B+)
- Audit-Grade Accuracy: 100 (A+)
- Cohort-Centric Design: 100 (A+)
- Multi-Dimensional Insights: 77.5 (B-)
- Anomalies: 100 (A+)

Audit-Grade Accuracy, Cohort-Centric Design, and Anomalies all scored at the top of the scale. The points come off in two pillars. Unified, Finance-Approved Foundation lost points for owner attribution and definitions. Multi-Dimensional Insights lost points for owner coverage, owner concentration, and spelling consistency.

Each check

Each item below is one part of the rubric. The heading names what the check looks at, and the code after "Cited as" is the reference.

Unified, Finance-Approved Foundation

Bookings with no product or no owner

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

This check measures how much of the latest book has no product and how much has no owner.

In this file, every booking has a product: 0% of the book is unassigned. 42 accounts have no owner, which is 20.8% of the book. A buyer would ask who manages those accounts today, and who will manage them after a transaction. Check score 30.

Next step. Assign a product and an owner to the unassigned book before the next export.

The words in the definitions were written down

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

This check looks for the standard terms in the definitions text. It does not test whether those definitions match the numbers.

In this file, 5 of the 9 terms are defined. A buyer would ask how GRR, MRR, new, and reactivation are calculated before relying on them. Check score 56.

Next step. Write a short definition for each headline term the summary uses, in the same words the rubric expects.

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)

- Revenue with no customer behind it (CP-04)
- The product side of 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)

Audit-Grade Accuracy

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

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.

This check measures the top owner's share of the latest book and the share with no owner.

In this file, 3 reps carry the assigned book. The top rep holds \$3.3M, a top share of 30.3%. A buyer would ask what happens to those accounts if that relationship changes. Check score 30.

Next step. Reassign concentrated accounts and fill the unassigned ones so the book is not one rep's.

Those tags actually cover the book

Multi-Dimensional Insights. Cited as SG-02.

For each tag, this check measures how much of the latest book sits on accounts with a real value.

In this file, 6 tags cover a mean of 79.9% of the book. Parent and owner are the gaps. A buyer would ask whether the book can be cut by owner and by parent customer before trusting any segment view. Check score 55.

Next step. Fill the blank tags on the accounts that carry the book, starting with product and owner.

The same idea is spelled one way

Multi-Dimensional Insights. Cited as SG-04.

This check groups tag values that match once case and spacing are removed. It then scores how many spellings each idea has.

In this file, 2 tags need clean-up: segment and status. A buyer would ask whether a filter on one spelling misses rows stored under another. Check score 80.

Next step. Pick one spelling for each category and apply it across 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

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). No single month moved the whole book, so there was nothing for this check to examine.
- Tags stay stable over the year (SG-07). The file stores one tag per account rather than one per month. As a result, changes in segment over time cannot be seen.

🔗 How this was graded

Weights: Unified, Finance-Approved Foundation 25%, Audit-Grade Accuracy 30%, Cohort-Centric Design

15%, Multi-Dimensional Insights 15%, Anomalies 15%.

Bands: A 90 or above, B 75 or above, C 60 or above, D 45 or above.

Bridge convention detected: monthly sum. Rules version caeb8e512330.

Readiness views:

- Decision-ready: not yet. The two open owner findings are current.
- Diligence-ready: no. A units-or-price table or a payments table is missing, and the same two owner findings are open.
- AI-ready: yes.

→ 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.