

FIELD GUIDE TOOL #9

The Metrics Governance Audit

Chapter 9: Metrics Governance: Informed Decision-making

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess your current measurement system against the governance standard. Work through all four parts before making any changes to your dashboard.

When to use it. Best used during any metrics review or when the dashboard has grown unwieldy.

Part A: The Full Inventory

List every metric currently reviewed in your regular leadership forums. Include the forum, frequency, and current owner for each.

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Metric name	Forum and frequency	Current owner
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
(continue as needed)		

Part B: The Three Tests

Apply the three governance tests to each metric. Be honest: Optimistic assessments defeat the purpose of the exercise.

Metric	Passes behavior change test? (Y/N)	Passes ownership test? (Y/N)
1.		
2.		
3.		
4.		
5.		

Metric	Passes decision relevance test? Last time it triggered a specific action?
1.	
2.	
3.	
4.	
5.	

Part C: The Leading Indicator Map

For each critical lagging indicator, identify the leading indicators that most reliably predict it and are within your influence.

Lagging indicator	Leading indicator 1	Leading indicator 2
1.		
2.		
3.		
4.		

Part D: The Governance Decision

Based on your audit, assign each metric to a category and define the next action.

Metric	Category (Governance / Reporting / Retire)	Next action
1.		
2.		
3.		
4.		
5.		
6.		
Summary: How many metrics will remain in real-time governance review?		

Before moving to Chapter 10, confirm:

- ☐ You have inventoried every metric in your current regular leadership reviews.
- ☐ You have applied all three governance tests to each metric honestly.
- ☐ You have identified the leading indicators for your most critical lagging outcomes.
- ☐ You have made a governance decision for each metric: keep, reclassify to reporting, or retire.
- ☐ You have a specific number of governance metrics that will remain in your real-time review after the audit.