Systems Patchwork: No Single Source of Truth

How a Fractional COO unifies reporting and eliminates data debates in leadership meetings

We had a client who was paying a weekly "visibility tax" just to understand what was happening in the business. Each department tracked performance differently, so meetings turned into debates about whose numbers were real. We fixed the operating system so leaders could act on the truth faster.

Quick Snapshot

Problem: Fragmented tools and inconsistent KPI definitions created data mistrust

Fix: Define lead and lag measures + standardize definitions + unify into one system

Result: Faster decisions with fewer reporting cycles and less meeting friction

What we walked into	What we did
• Each department used different tools and different definitions for the same KPI	• Aligned leadership on a small set of lead and lag measures that mattered
• Sales activity and outcomes were tracked inconsistently across reps or offices	• Standardized KPI definitions so teams measured the same behaviors the same way
• Leaders challenged the data instead of solving problems	• Unified tracking into one operating system and trained teams on usage
• Owners needed slide decks or spreadsheets to see the current state	• Set the rule: if it is not in the system, it did not happen
• Work happened in email and chats, then got reported later as a best guess	• Documented workflows so the system supported the work consistently

What changed

• Meetings shifted from debating numbers to acting on them
• Leaders gained near real-time visibility without waiting for reports
• Definitions stayed consistent across teams and locations
• Decisions happened faster and accountability improved

Best fit when

• Leaders argue about whether the numbers are accurate
• Departments track work in different tools that do not connect
• Reporting is manual and slow, often built for meetings
• The owner cannot see the truth without asking someone to assemble it

Typical first 30-day focus

• KPI alignment workshop and definition standardization
• Tool and workflow inventory with single-system recommendation
• Pilot rollout with training and adoption rules
• Baseline dashboard for lead and lag measures

Want the KPI and system-selection worksheet?

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