DACS Accountability Gate Template Example

Filled-in example: Active Customer Count

Current Document Available Here:
https://dacs.datavaultalliance.com/documents/accountability-gate-template-example

Scenario

A weekly executive dashboard reports Active Customer Count. Sales, Finance, and Operations use slightly different definitions. The team wants one small Gate that determines whether the metric is ready for internal executive dashboard use.

Use this template to build one lightweight DACS Gate for one narrow decision path. Complete it manually first. Automate only after the pattern is stable.

Field	Entry
Decision path or metric	Weekly Executive Dashboard: Active Customer Count
Business decision supported	Internal executive review of customer growth, retention exposure, and operating priorities.
Stated decision scope	North America subscription-customer Active Customer Count for weekly internal executive dashboard use.
Grain	One customer account as of the reporting week end.
In-scope use	Internal weekly trend discussion and operating review.
Out-of-scope use	External reporting, compensation decisions, regulatory reporting, or customer commitments.
Business owner	VP Customer Operations.
Technical owner	Analytics engineering lead for executive dashboard.
Governance or stewardship authority	Customer data steward and finance analytics steward.
Material concepts	Customer Account; Active Status; Subscription Contract; Reporting Week; Exclusion Rule.
Stable identifier / identity rule	CRM Master Account ID. Duplicate accounts use approved master-account resolution rule.
Material relationship paths	CRM Account to Billing Customer; Customer Account to Subscription Contract; Subscription Contract to Active Status; Reporting Week to period boundary.
AI/context involvement	None for first pass. AI Context Contract controls not applied.
Gate question	Can Active Customer Count be used in the weekly executive dashboard for the stated internal-use scope?

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Evidence, readiness, and next action

Field	Entry
Required evidence	Scope record; definition owner approval; identity rule; source references; active-status code list; exclusion rules; relationship/path note; Gate readiness log.
Pass condition	All material concepts, identity rules, relationship paths, exclusions, and owner approvals are recorded and assigned a readiness state.
Formal readiness state	Caution. Use allowed for internal trend discussion with recorded exclusions and caveats.
Items classified as Quarantined	Status codes Pending Reactivation and Manual Hold until business meaning and inclusion/exclusion treatment are approved.
Caution / Stop conditions	Caution applies because two status codes remain Quarantined. Stop would apply if CRM Master Account ID or active-status source mapping is missing.
Constraints or exceptions	Do not use for external reporting, compensation decisions, regulatory filings, or customer-facing commitments.
Remediation owner	Customer data steward to resolve two status codes with Customer Operations and Finance.
Review condition / date	Review after status-code decision or before next monthly executive operating review.
Evidence packet location	Executive dashboard evidence folder: Active Customer Count / First Look / Week 1.
Recommended next decision	Proceed with constrained internal use; resolve Quarantined status codes before expanding use.

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