

Which customers actually drive profitable growth?

Connect the data. Check the insight. Approve the action. Measure what changes.

Finance, growth and operations can use different definitions of customer, activation and revenue. A correct count is not useful until everyone knows what it counts.

One person. Two contracts. Three CRM records.

An illustrative example: three records can describe one person with two contracts. None of those counts is interchangeable. Agree on the entity and time window before comparing teams.

Customer — Person, account or contract? Resolve duplicate CRM records and name the counting unit.

Activation — Account created, first transaction or another approved milestone? State the event and window.

Revenue — Recognized, invoiced or collected? Align dates, exclusions and acquisition-cost treatment.

01 / ASK

Join CRM, transactions and acquisition costs. Ask which defined customer cohort merits a growth or margin investigation.

02 / CHECK

Inspect approved metric rules and the executed query. Verify joins, counting unit, dates and exclusions before accepting the insight.

03 / ACT

A human approves a named follow-up or investigation and its owner. Execute through a supported integration, such as Jira, with a scoped task and deadline.

04 / MEASURE

Monitor execution status and the agreed activation, revenue or margin metric. Schedule an impact review, for example in 14 days; an observed change is not proof of causality.

EXECUTION / Jira • Human approval • Scheduled review: 14 days

States: executed / expired / failed. Review status separately from the outcome.

One customer. Show the definition.

Attach the entity, approved activation rule, reporting period and revenue basis to the result. Keep the executed query inspectable. If teams use different definitions, show them rather than silently blending them.

Observed changes are not causal uplift. Agree on the evaluation method before claiming an effect.

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Illustrative workflow. Deployment and supported actions scoped with your team.

stephane@duke-analytics.com