THE RESULT

"Net retention 113%"? 103% on finance's numbers. The draft counted Arden twice, left out Kestrel and added a one-off project.

A CRO at a 58,000-person industrial automation company checks the recurring revenue page of the board pre-read three days before it goes out, with any AI chat her company allows.

THE RESULT Helena's page for the February 4 pre-read. Fictional company.

TALVORA GROUP · REVENUE

Recurring revenue, FY26

Board pre-read, February 4

From: Helena Vasquez · source: finance revenue bridge

THE THREE FIGURES

Recurring run rate	Net revenue retention	Gross revenue retention	Customers
$820M	**103%**	**92%**	**1,240**
Up 9% on $750M	Customers at the start of FY26	Same customers, no expansion	Legal entities, up 8%

HOW THEY'RE COUNTED

One source: finance's revenue bridge. Customers are legal entities. Retention counts revenue from the 1,150 customers we had at the start of the year. · Input 2

CHURN — **Kestrel Grid ($18M) is counted as churn: its contract ended December 31**
This assumes finance's $42M of churn includes Kestrel; finance confirms by Wednesday, February 3. A win-back, if signed, will be reported as new business. · Inputs 2, 3, 4

EXCLUDED — **The $40M Brightwater installation is a one-off and isn't in recurring revenue**
· Input 4

NOTE — **Arden Foods' new subsidiary ($18M) is a new customer, not expansion**
Expansion from existing customers: $78M. · Inputs 2, 3

CAUGHT ON REVIEW

1. "113% net retention" counts **Arden's $18M twice** and leaves out **Kestrel**
2. "97% gross retention" is **customers kept**, not revenue: 92% on revenue
3. "Recurring revenue" includes a **$40M one-off** installation

UC-001 · SC-30 · REV A	
FOR **Chief Revenue Officer**	SECTOR **Industrial automation**
COMPANY **58,000 people · 40 sites**	TASK **Check the recurring revenue page of the board pre-read before it goes out**
WRITTEN FOR **ChatGPT · Claude · Gemini · Copilot**	
AI TEST **Claude, Nov 14, 2026 · 7 of 7 found**	

STEP 0 · THE MESS

What landed on Helena's desk

A tidy draft page from revenue operations, finance's revenue bridge, customer success's export, and revenue operations' own notes on how each figure was built. Every number comes from a real report. They don't all count the same way.

DRAFT BOARD PAGE [1]

Recurring revenue

"Net revenue retention 113%. Gross retention 97%."

1 **Seven lines.**

FINANCE [2]

Revenue bridge

Start 750 · expansion +78 · churn -42 · new +49 · end 820.

2 **One source?**

CUSTOMER SUCCESS [3]

Export and notes

"Active customers: 1,380. Customer success counts each customer site separately."

3 **Same customers?**

REVENUE OPS [4]

How it was built

"Expansion uses the customer success figure. New customers use the finance figure."

4 **Two sources mixed.**

YOU'RE NOT ALONE

44%

of sales leaders in a Gartner survey named poor data quality as one of the top three barriers to getting value from sales analytics.

Gartner, survey of 303 sales leaders, fielded July 2023, published February 2024. Source

STEPS 1–3 · HOW IT WORKS

Three steps, one chat

Here the AI checks a board page where every number has a source, but not the same one. The prompt asks which customers each figure counts.

1 Open a new chat

Use the AI tool your company approves: ChatGPT, Claude, Gemini or Copilot.

2 Paste the prompt and the inputs

Copy the prompt and the four fictional inputs from the appendix into one message.

3 Recalculate one figure yourself

Work out net revenue retention from finance's bridge alone. Then decide what the board sees first.

THE PROMPT, PART BY PART

COPY-READY VERSION IN THE APPENDIX

I'm Chief Revenue Officer at an industrial automation company that sells equipment, service contracts and software subscriptions. Revenue operations has drafted the recurring revenue page of our board pre-read. It goes out Thursday, February 4, and the board meets Thursday, February 11. Today is Monday, February 1. Below are the draft page, finance's revenue bridge, the customer success export and revenue operations' notes on how the page was built.

1 Who you are, when the pre-read goes out, when the board meets and today's date.

Please give me:

1. **Each line on the draft page**: holds, doesn't hold, or unverified, with the input that shows it.
2. **The corrected figures**, with the calculation for each.
3. **The definitions the board should see**: for each measure, whether it counts revenue or customers, and which customers it includes.
4. **What must be confirmed before Thursday**, and by whom.
5. **The revised page**, no longer than the draft.

2 A verdict on each line with its source, the corrected figures with their calculations, the definitions, what must be confirmed and by whom, and a revised page.

Every figure on the page must come from one source and one definition, and say which customers it counts. Check the arithmetic. Don't add facts that aren't in the inputs; if you assume something, say so.

3 The heavy lifting: every figure from one source and one definition, saying which customers it counts. It found all seven planted problems.

WHERE TO PASTE

Every tool has one message box. Paste the prompt, add a blank line, paste the inputs, send. Exports can be attached as files if your tool allows it.

SAFE TO TRY

Practise with the fictional inputs first. Board materials and customer revenue are confidential: use only your company's approved tool.

THE AI'S FIRST ANSWER

What Claude actually wrote

Exactly as it came back, not edited. Read it the way Helena did: check each point against the source it cites.

UNEDITED Claude · fresh session, no other context · Nov 14, 2026 · one run

Summary

Five of the seven lines on the draft page don't hold as written. Most of the problems come from mixing two sources and two definitions. The draft adds a one-off $40M project, counts the Arden subsidiary twice, leaves out a customer that has already churned, and divides finance's revenue by customer success's site count. Corrected on finance's basis: run rate $820M (up 9%), net revenue retention 103%, gross revenue retention 92%, 1,240 customers, expansion $78M, average $0.66M.

Assumptions I've made (please confirm):

- **A1.** Finance's churn of $42M and 38 customers includes Kestrel Grid ($18M, one customer). Revenue operations used churn of 24 = 42 - 18, which suggests this, but no input says it outright. `found`
- **A2.** FY26 ends December 31, so Kestrel's contract ending on December 31 falls inside FY26.
- **A3.** The FY26 start figures ($750M, 1,150 customers) equal the FY25 closing figures the board saw last year.

1. Each line on the draft page

Draft line	Verdict	Input that shows it
Recurring revenue $860M, up 15%	**Doesn't hold**	[2] ends at $820M. [4] adds the $40M Brightwater project, which finance calls "a one-off installation, invoiced on completion" (860 = 820 + 40). `found`
Net revenue retention 113%	**Doesn't hold**	[4] uses customer success's $96M expansion, which includes Arden's $18M that [2] counts as new business. It also drops Kestrel's $18M from churn, even though the contract ended Dec 31 [3], and adds the $40M Brightwater project. `found`
Gross retention 97%	**Doesn't hold as labelled**	[4]: it's a customer count, (1,150 - 38)/1,150 = 96.7%, shown next to revenue measures as if it were one. Gross revenue retention is 92%. It's also unclear whether the 38 includes Kestrel, which revenue operations says it left out. `found`
Customers 1,240, up 8%	**Holds** (legal entities)	[2]: 1,150 - 38 + 128 = 1,240. 1,240 / 1,150 = 1.078, so up 7.8%, about 8%. It depends on A1 and A3. `found`
Expansion $96M	**Doesn't hold**	[3]: it includes Arden Foods' new subsidiary ($18M). [2] counts that subsidiary as a new customer, so it's counted twice. 96 - 18 = 78, which matches [2]. `found`
New customers 128, adding $49M	**Holds** (legal entities)	[2]. Note it includes Arden's subsidiary at $18M.
Average per customer $0.62M	**Doesn't hold**	[4]: $860M / 1,380. That's revenue including Brightwater divided by customer success's site count (1,380 sites, [3]), not finance's 1,240 legal entities. `found`

2. Corrected figures

All figures use finance's bridge [2]: annual run rate, with customers counted as legal entities.

- **Run rate at end of FY26: $820M.** Check: 750 + 78 - 15 - 42 + 49 = 820. Growth: 820 / 750 = 1.093, so **up 9.3%**.
- **Net revenue retention: 102.8%, about 103%.** (750 + 78 - 15 - 42) / 750 = 771 / 750. This covers customers present at the start of the year only. New customers, including the Arden subsidiary, are excluded. Brightwater is excluded. Kestrel is counted as churn (A1).
- **Gross revenue retention: 92.4%, about 92%.** (750 - 15 - 42) / 750 = 693 / 750. Expansion isn't counted.
- **Customer (logo) retention: 96.7%, about 97%.** (1,150 - 38) / 1,150 = 1,112 / 1,150. This counts legal entities, not revenue.
- **Customers: 1,240, up 7.8%.** 1,150 - 38 + 128 = 1,240.
- **Expansion: $78M.** Customer success's 96 minus Arden's 18 = 78, which matches [2].
- **New customers: 128, adding $49M**, including the Arden subsidiary ($18M).
- **Average run rate per customer: $0.66M.** 820 / 1,240 = 0.661.

3. Definitions for the board

Measure	Counts	Which customers
Run rate (ARR)	Revenue: annual recurring run rate at year end, excluding one-off projects	All 1,240 legal-entity customers at year end
Net revenue retention	Revenue	Only the 1,150 customers at the start of the year. Includes their expansion, downgrades and churn. Excludes new customers.

Measure	Counts	Which customers
Gross revenue retention	Revenue	The same 1,150 start-of-year customers. Downgrades and churn only, no expansion. Can't exceed 100%.
Customer retention	Customers	The 1,150 start-of-year legal entities, and how many were kept (1,112)
Customers	Customers	Legal entities, as finance counts them. Not customer success's sites (1,380).
Expansion	Revenue	Existing legal entities only. A new subsidiary with its own contract counts as a new customer, not expansion.
New customers	Both (count and $)	Legal entities that signed in FY26, including the Arden subsidiary
Average per customer	Revenue ÷ customers	$820M ÷ 1,240 legal entities

4. Confirm by Wednesday, February 3 (before the pre-read goes out Thursday, February 4)

- **Finance (CFO or controller):**
  - Confirm A1: is Kestrel in the $42M and the 38?
  - Confirm A2: the fiscal year end.
  - Confirm A3: does the $750M / 1,150 start match what the board saw for FY25?
  - Confirm the Brightwater $40M is out of the run rate and its booking will be corrected. The inputs don't show whether any recurring service contract comes with Brightwater. If there is one, finance should state its value separately.
- **Customer success:** confirm the whole $18M gap between its $96M and finance's $78M is Arden, and nothing else.
- **Revenue operations:** rebuild the page from finance's bridge alone, and stop using customer success's expansion figure and site count on board material. `B: one rule for both teams`
- **You (CRO):**
  - Kestrel: decide whether the page mentions the hoped-for Q2 win-back. It's only a hope, so it shouldn't change any figure. If it's won back, it counts as new business when signed. `C: decide it`
  - Unknown: whether past board pages used the same definitions. If they didn't, the board needs a one-line note saying the basis changed.

5. Revised page (7 lines, same as the draft) `A: three figures first`

Recurring revenue, FY26. Source: finance revenue bridge; customers counted as legal entities.

- Annual recurring run rate: $820M at year end, up 9% on $750M at the start of the year. Excludes the $40M one-off Brightwater installation.
- Net revenue retention: 103%, revenue from the 1,150 customers we had at the start of the year, after expansion, downgrades and churn.
- Gross revenue retention: 92%, the same customers, downgrades and churn only. Churn includes Kestrel Grid ($18M; contract ended December 31)*.
- Customers: 1,240, up 8%; we kept 1,112 of 1,150 (97%) and lost 38*.
- Expansion from existing customers: $78M.
- New customers: 128, adding $49M, including Arden Foods' new subsidiary ($18M, its own contract).
- Average run rate per customer: $0.66M ($820M ÷ 1,240).

*Assumes finance's churn includes Kestrel; finance to confirm by February 3.

`found` caught a planted problem `A–C` Helena changes it; see the next section

THE HUMAN PART

What Helena changed, and why

Claude found every planted problem, recalculated each figure and named what finance must confirm. Helena's edits are about what the board sees first, how the fix lands with two teams, and one call it left to her.

WHAT CLAUDE FOUND: 7 OF 7 PLANTED PROBLEMS

One run

- ✓ Net retention 113%
- ✓ "Gross retention" counts customers
- ✓ Expansion counted twice
- ✓ Kestrel left out of churn
- ✓ One-off in recurring revenue
- ✓ Two customer counts
- ✓ What holds

THREE EDITS, ALL JUDGMENT CALLS

	CLAUDE WROTE	HELENA'S VERSION	WHY · AUDIENCE
A	A seven-line revised page with a definition inside every line.	**The board sees run rate, net and gross revenue retention and customers first. One line says how they're counted; Kestrel, Brightwater and Arden each get one short line below.**	Board members compare these figures quarter to quarter. They need the numbers first and the reasons in one place.

	CLAUDE WROTE	HELENA'S VERSION	WHY · RELATIONSHIP
B	"Revenue operations: rebuild the page from finance's bridge alone, and stop using customer success's expansion figure and site count on board material."	**Helena gets finance, customer success and revenue operations to agree one set of definitions by Wednesday, February 3, with finance's bridge as the source for board material.**	The mix came from two teams counting in different ways. A rule for one team leaves the other team's numbers in reports the board may see later.

	CLAUDE WROTE	HELENA'S VERSION	WHY · DECISION
C	"Kestrel: decide whether the page mentions the hoped-for Q2 win-back."	**The win-back stays off the page. If it's signed, it's reported as new business then.**	A hope next to a churn figure reads as a reason to discount the churn. The board should see the number as it stands.

What only you can do Put the board's figures first, fix the definitions with both teams, and keep hopes off the page. The AI checked every line. You decide what the board relies on.

YOUR TURN

Make it yours

Use it whenever a page for the board or the executive team pulls figures from more than one team: retention, customer counts, pipeline, headcount, cost.

YOUR PROMPT: FILL IN THE BRACKETS

I'm **[your role]** at a **[industry]** company. **[Who]** has drafted **[the page]** of our **[board pre-read or report]**. It goes out **[date]**, and **[the meeting]** is **[date]**. Today is **[date]**. Below are **[the draft page, the source reports, and notes on how the page was built]**.

Please give me: **1. Each line on the draft page**: holds, doesn't hold, or unverified, with the input that shows it. **2. The corrected figures**, with the calculation for each. **3. The definitions [the readers] should see**: for each measure, whether it counts **[revenue or customers]**, and which **[customers]** it includes. **4. What must be confirmed before [date]**, and by whom. **5. The revised page**, no longer than the draft.

Every figure on the page must come from one source and one definition, and say which **[customers]** it counts. Check the arithmetic. Don't add facts that aren't in the inputs; if you assume something, say so.

FIVE CHECKS BEFORE THE PAGE GOES OUT

1. Every figure has one source.
2. Retention says whether it counts revenue or customers.
3. Nothing is counted in two lines.
4. Customers who left are in the churn, whatever the hopes.
5. One-off projects stay out of recurring revenue.

MAKE IT REPEATABLE (OPTIONAL)

Save the prompt once and reuse it every board cycle: a custom GPT in ChatGPT, a project in Claude, a Gem in Gemini, or an agent in Copilot. Some companies switch these off; copy and paste always works.

WITH REAL DATA

Board materials and customer revenue are confidential. Use only the AI tool your company approves, and follow its rules.

WHAT THIS EXAMPLE SHOWS

One run of this prompt in Claude found all seven problems planted in fictional inputs and named what finance must confirm.

WHAT IT DOESN'T SHOW

That every tool, setting or run will do the same, how much time it saves you, or how a real company should define its retention measures. Talvora Group, its customers and its people are fictional.

APPENDIX

Copy-ready: the prompt and the four inputs

Copy the prompt, then all four inputs, into one message in a new chat. Everything here is fictional and safe to paste.

THE PROMPT

I'm Chief Revenue Officer at an industrial automation company that sells equipment, service contracts and software subscriptions. Revenue operations has drafted the recurring revenue page of our board pre-read. It goes out Thursday, February 4, and the board meets Thursday, February 11. Today is Monday, February 1. Below are the draft page, finance's revenue bridge, the customer success export and revenue operations' notes on how the page was built.

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[1] DRAFT BOARD PAGE: RECURRING REVENUE, FY26 (REVENUE OPERATIONS)

- Recurring revenue: $860M, up 15% on FY25.
- Net revenue retention: 113%.
- Gross retention: 97%.
- Customers: 1,240, up 8%.
- Expansion from existing customers: $96M.
- New customers: 128, adding $49M.
- Average recurring revenue per customer: $0.62M.

[2] FINANCE: FY26 RECURRING REVENUE BRIDGE (ANNUAL RUN RATE, $M)

Line	$M	Customers
Start of FY26	750	1,150
Expansion	+78	
Contraction (downgrades)	-15	
Churn	-42	-38
New customers	+49	+128
End of FY26	820	1,240

Finance counts a customer as a legal entity. New customers include Arden Foods' new subsidiary ($18M), which signed its own contract.

[3] CUSTOMER SUCCESS EXPORT AND NOTES

- Expansion from existing customers: $96M. This includes Arden Foods' new subsidiary ($18M), which customer success counts as expansion of the Arden account.
- Active customers: 1,380. Customer success counts each customer site separately.
- Kestrel Grid ($18M a year) gave notice in October. Its contract ended December 31. We hope to win them back with a new deal in the second quarter.

[4] REVENUE OPERATIONS: HOW THE PAGE WAS BUILT

- Expansion uses the customer success figure. New customers use the finance figure.
- Kestrel is left out of churn and retention because customer success says talks are still open.
- Recurring revenue includes the $40M Brightwater upgrade project, which the region booked as recurring. Finance's note: "Brightwater is a one-off installation, invoiced on completion."
- Net revenue retention: (750 + 96 - 15 - 24 + 40) / 750. Gross retention: customers kept, (1,150 - 38) / 1,150. Average per customer: $860M / 1,380.