

A DASHBOARD WORTH USING

Start with one business question. Make every number traceable.

Claude Dashboards is a beta on paid plans. Enterprise admins may need to enable it. It connects to supported data platforms and tools; check your plan and connector access first.

Build the first version

1. Choose one question, such as which channel brought qualified leads this month. Define the metric, date range, timezone and comparison period.
2. Connect only the data you need. Use an approved dataset and the narrowest available access; remove personal fields the dashboard does not need.
3. Ask for three charts at most: the trend, the breakdown and the next decision. Ask Claude to explain each query and show when the data last refreshed.
4. Compare a few totals with the source system. Check missing rows, duplicates, filters and denominators before sharing.

Copy this brief

Build a dashboard answering [question] from [approved data]. Use [metric definition], [date range] and [timezone]. Include a trend, a breakdown and a plain-language takeaway. Show each query, the refresh time and any missing data. Do not infer unavailable values.

Before you share

1. Check that a colleague can explain the main number and its denominator.
2. Review who can open the dashboard, then check the same link as a viewer.

ORIGINAL RESOURCE

[Claude's dashboard and motion announcement](https://claude.com/resources/articles/dashboards-and-motion)

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An independent companion by Huzaifa Shoukat. Check the original project for current setup and availability. Prepared 12 October 2026.