

Dashboard Request Intake Template

Domain Methods

WHAT THIS TEMPLATE IS FOR

Use this when someone says they need a dashboard. The point is to turn the artifact request into a decision brief before a reporting rebuild starts drifting into a trust, scope, or definition argument.

REQUEST SNAPSHOT

- Business question or decision we are trying to improve:
- Primary user and team:
- Meeting, workflow, or review where the answer will be used:
- Deadline that is real versus deadline that is just anxiety:

DEFINE THE METRIC FAMILY

- Core metric or signal that actually matters:
- Metrics that are nice to have but not required for phase one:
- Current source systems involved:
- Which system should be authoritative for this use case:

SET THE CONFIDENCE LEVEL

- Directional / decision-grade / board-grade:
- What caveats are acceptable for this workflow:
- What would make the output unfit to use:

SCOPE THE FIRST MOVE

- Smallest useful first version we could ship:
- Dependencies that could block or distort it:
- Better artifact than a dashboard if applicable: report, memo, CRM view, score, or workshop packet:

END THE INTAKE WITH ONE DECISION

- Build a narrow first version now:
- Translate the ask further before building:
- Align definitions first across teams:
- Escalate into foundation/governance work: