

Dashboard Request Triage Intake Brief

Domain Methods

WHAT THIS INTAKE BRIEF IS FOR

Use this sheet when someone asks for a dashboard and the room needs to decide whether the right next move is a reusable dashboard, a one-time decision brief, or a workflow change instead.

1. NAME THE REQUEST HONESTLY

- Request in the stakeholder's words: _____
- Meeting or workflow creating the urgency: _____
- Decision that changes if the number moves: _____
- Primary audience opening the output first: _____

2. RECURRING OR ONE-TIME?

- Same audience needs this every week or month: yes / no
- This is mostly for one planning, budget, or board call: yes / no
- If one-time, what recommendation or comparison is needed? _____

3. REUSE READINESS

- Metric definitions are stable enough to reuse: yes / no
- A named owner can defend the number: yes / no
- One system wins for this use case: yes / no
- Caveats that still appear every meeting: _____

4. EXPLORATION OR BEHAVIOR CHANGE?

- User needs to filter, compare, and inspect movement: yes / no
- Team really needs a handoff, meeting, or approval change: yes / no
- Named workflow or cadence fix: _____

5. CHOOSE ONE OUTPUT

- Dashboard when the same operator needs recurring exploration. yes / no
- Decision brief when the room needs one bounded call. yes / no
- Workflow change when the problem is ownership or cadence. yes / no
- Why this is the honest fit: _____

6. NEXT ROUTE

- Use Translate the Ask when the request is still mixing audience, decision, and artifact shape.
- Use Three Teams, Three Numbers when the intake exposes a definition fight across teams.
- Use Data Foundation when recurring use is clear but the source logic is still too brittle to reuse.