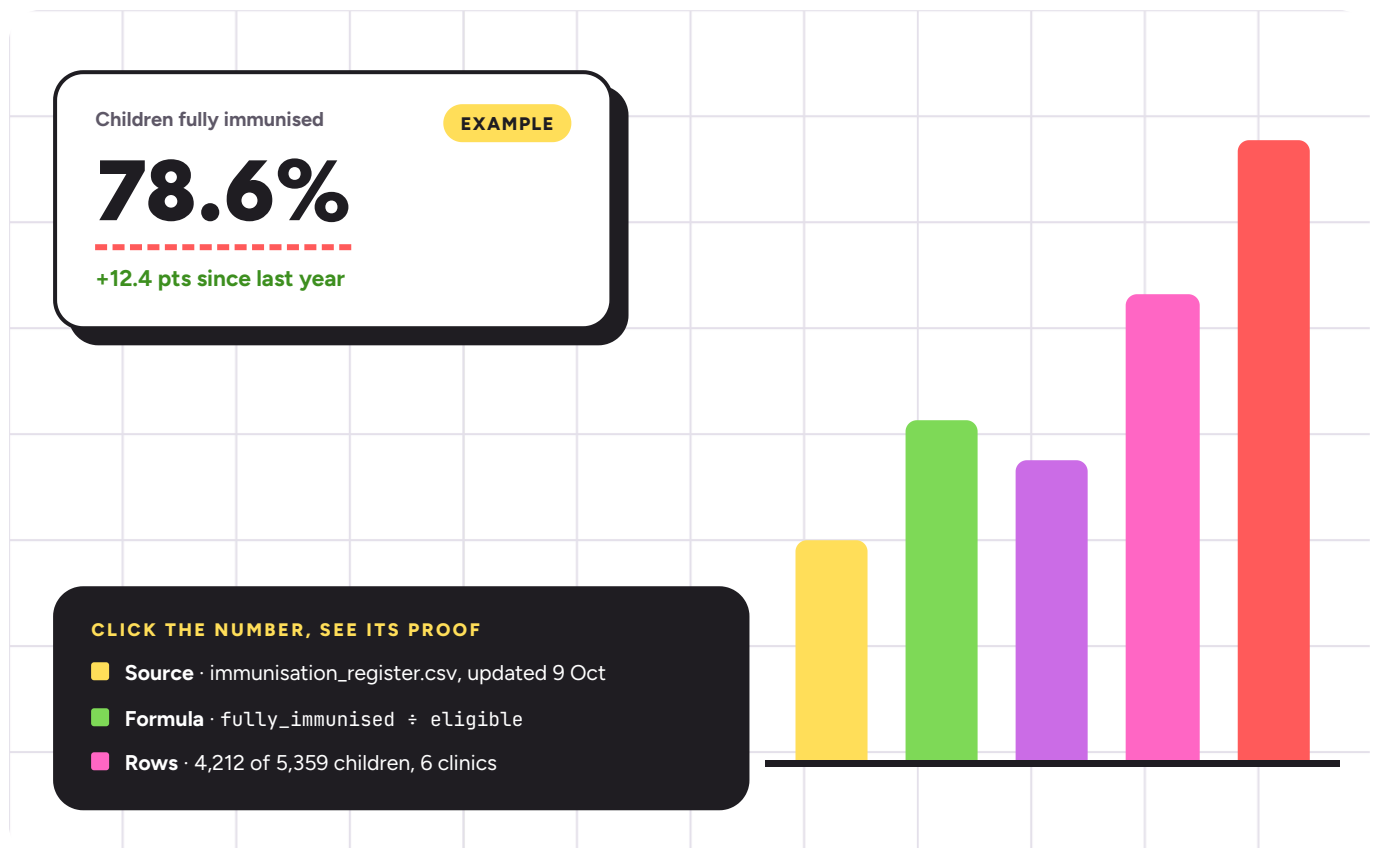


Claude Dashboard Playbook.

Build evidence dashboards where every number is one click from its proof.



The meeting stalls on one question.

A senior manager points at the slide: "Where does 79% come from?" It happens in health reviews, board meetings and government briefings alike. What happens next decides whether your evidence gets used.

TODAY

Three spreadsheets and a promise

- 10:02** The analyst opens the master sheet, the cleaned export, then the pivot.
- 10:09** The denominator differs from last month's deck. Nobody knows why.
- 10:15** "We'll send it after." The decision slips a month.

WITH A CLAUDE DASHBOARD

One click, in the room

- 10:02** The officer clicks the number on the shared dashboard.
- 10:02** Source, formula and the rows behind it appear.
- 10:04** They filter to their region and agree which sites need support.

ONE PLAYBOOK, ANY FIELD

Health

Children fully immunised

Education

Students at grade level

Livelihoods

Members with new income

Climate

Homes using clean cooking

Business

Customers renewing

Public services

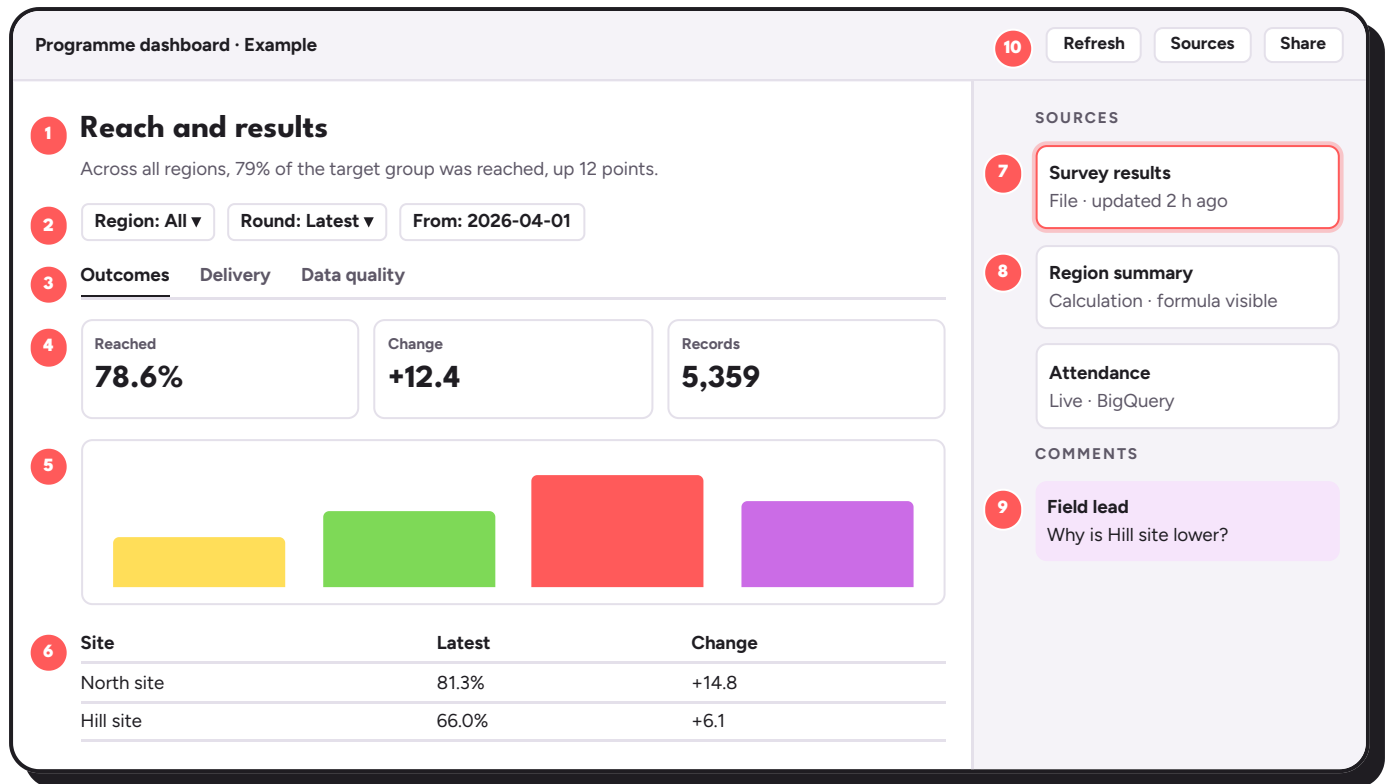
Requests resolved on time

INSIDE THIS PLAYBOOK

01	See it The ten parts of a dashboard, and what to say to change each	p. 3
02	Build it The five-part prompt and the six-step build	p. 4
03	Feed it Any tool, five routes in: surveys, forms, sheets, databases, reports	p. 5
04	Shape it 24 features, 12 recipes and 7 patterns	p. 6
05	Fix it Six problems and how to solve them	p. 9
06	Share it Access, cost and data protection	p. 10
07	Master it Three levels, cheat sheet, checklist and FAQ	p. 11

Anatomy of a Claude dashboard.

Ten parts, each with the sentence to say to Claude to change it.



1 Title and takeaway

One line that says what it found, rewritten when a filter changes.

Say: Add a takeaway that names the weakest region

3 Tabs

Several pages, each with its own link for a different audience.

Say: Split into Outcomes and Delivery tabs

5 Charts

Any chart you name. Hover for values, click a bar to filter.

Say: Make this a slope chart by region

7 Sources panel

Every source with its freshness; click a number to see formula and rows.

Say: Explain what this formula counts

9 Comments

On any chart. Send one to Claude and it answers or makes the change.

Say: Reply and add a Hill site breakdown

2 Filters

Dropdowns and date ranges re-cut every chart at once.

Say: Add a region filter and a date range

4 Headline tiles

Big numbers with their change, each clickable to its source.

Say: Show change since last round under each tile

6 Tables

Sortable, searchable, every cell traceable to its row.

Say: Sort the site table by change

8 Calculations

Gains, rates and gaps as named formulas any reader can open.

Say: Add the success rate as a calculation

10 Refresh and Share

Refresh re-runs live sources; Share sets who can view or edit.

Say: Which sources are live?

Write the prompt that gets it right.

Good dashboards start from a decision, not a dataset. Every strong prompt has five parts.

Who

The people who read it

Decision

What they decide with it

Rhythm

How often they look

Questions

Three to five it must answer

Data

Where it lives, plus your must-haves

EXAMPLE PROMPT • HEALTH. SWAP IN YOUR OWN FIELD

Build a dashboard from the attached file for district health officers.
It should help them decide which clinics need outreach camps every month.

Answer these questions:

1. Is coverage rising since last year?
2. Which clinics are furthest behind?
3. Are girls and boys covered equally?

Lead with the figure closest to the outcome, and write a one-line takeaway under the title.
Include a region filter, a gender split on every outcome chart, a sortable clinic table.
Show each metric's definition where it first appears.

THE SIX-STEP BUILD

1

Name the decision

"This helps [who] decide [what] every [cadence]."

2

List 3 to 5 questions

Each becomes a tile or chart. Lead with the outcome.

3

Prepare the data

One row per observation. Aggregate. Strip names and IDs.

4

Prompt Claude

Open a dashboard, attach the file, paste the prompt.

5

MOST SKIPPED

Review in Sources

Click every headline figure and check what the formula counts.

6

Iterate

One plain change at a time, then back to step 5.

Any tool, five ways in.

Five routes, from simplest to most automated. Every tool can use route 1.

1 • EXPORT AND ATTACH

Download a CSV, Excel or JSON export and attach it. Up to 8 MB per file.

Build from the attached export

2 • CONNECT LIVE

Connect the app in Claude, such as Google Drive or a warehouse. Queries run on every open.

Use the responses sheet in my Drive

3 • BRIDGE THROUGH A SHEET

Sync your tool into a Google Sheet or database, then connect that live.

Use the synced Kobo sheet in Drive

4 • SAVED AND SCHEDULED

Claude re-runs a query on a schedule and saves the rows for everyone.

Refresh this every Monday at 9

5 • PASTE, EXTRACT OR FETCH

Paste a table, attach a PDF report or screenshot, or fetch a public dataset.

Pull the tables from this PDF

FIND YOUR TOOL

YOUR DATA IS IN	BEST ROUTE	HOW
KoboToolbox Surveys	1 3	Data, then Downloads: export CSV or XLS with labels. For live data, pull a synced export into a Google Sheet.
ODK / SurveyCTO Surveys	1 3	Download submissions as CSV, or publish to a sheet or database where your server supports it.
CommCare Case management	1 3	Create a form or case export and download Excel or CSV. Case exports give one row per case, form exports one per visit.
Google Forms Forms	2 1	Link responses to a Google Sheet, connect Google Drive, and point Claude at the sheet.
Google Sheets Spreadsheets	2 1	One header row, one row per record, no merged cells. Name the sheet and tab.
Excel Spreadsheets	1 2	Save the sheet as CSV, or keep the workbook in a connected drive.
DHIS2 Health systems	1 4	Export a pivot of aggregated indicators as CSV and replace it each reporting period.
CRM Salesforce, HubSpot	2 1	Connect it if your organisation offers a connector; otherwise export a report as CSV.
Database or warehouse BigQuery, Snowflake, Databricks	2 4	Connect it in Claude and name a summary table or view; review the query in Sources.
PDF or Word report Documents	5	Attach it and ask Claude to pull the tables into a dataset. Spot-check a few numbers.
Public data portal Census, open data	5 1	Ask Claude to find the dataset or download it yourself; cite source and year on the page.
Pasted table Quick numbers	5	Paste it into chat and ask Claude to save it as a dataset.

Connectors available to you depend on your Claude plan and your organisation's settings. Aggregate and remove names and IDs before attaching any file.

Every feature, and what to say.

Connect

Bring data in, keep it current

Attached files

CSV, TSV or JSON up to 8 MB.

[Build from the attached file](#)

Live queries

Runs on a connected app on every open, refresh or filter.

[Use the live registrations table](#)

Scheduled refresh

A saved query re-run on a cadence, with stale warnings.

[Refresh this every Monday](#)

Mixed sources

A live feed beside a static baseline file.

[Compare live attendance with baseline](#)

Trust

Every number checkable

Click to trace

Opens a number's source, freshness, formula and rows.

[Make every tile traceable to its rows](#)

Named calculations

Gains, rates and gaps as readable formulas.

[Add the gender gap as a calculation](#)

Mismatch flags

A number that disagrees with its data is flagged.

[Check every figure matches its source](#)

Editable queries

Editors open, test, save and restore live queries in Sources.

[Show me the query behind attendance](#)

Explore

Readers find their own answer

Dropdowns and multi-select

Re-cut every chart by region, cohort or gender.

[Add a region dropdown](#)

Date ranges

Defaults can be relative, like the last 90 days.

[Add a date range, default last quarter](#)

Click to drill

A bar or row filters the whole page, with a chip to clear.

[Clicking a site filters everything](#)

Tooltips, sort, search

Exact values on hover; tables sort and search.

[Make the table sortable and searchable](#)

Structure

Organise for each audience

Tabs

Several pages; each loads its data when opened.

[Add a Data quality tab](#)

Deep links

A link that opens a named tab or section.

[Give the scorecard its own link](#)

Any chart type

Bars, lines, slope, heatmap, funnel, small multiples.

[Draw sign-ups as a funnel](#)

Responsive and themed

Light and dark, and narrow widths beside chat.

[Make it read well at phone width](#)

Collaborate

Questions become fixes

Comments

On any chart or number; the thread stays with it.

[Built in](#)

Comments to Claude

Claude answers in the thread or makes the change.

[Send a comment to Claude](#)

Point and ask

Claude sees which tab or chart you selected.

[What explains the dip on this chart?](#)

CSV download

Any source downloads for re-analysis.

[Built in](#)

Present

Tell the story in the room

Play mode

Step through rounds with animated bars.

[Add a Play button by round](#)

Smooth transitions

Charts glide to new values on a filter change.

[Make filter changes glide](#)

Scroll story

Chapters beside one chart that changes as you scroll.

[Add a five-chapter scroll story](#)

Scorecard view

Four to six indicators with change and target.

[Make a funder scorecard](#)

Twelve prompts, ready to send.

Replace the highlighted words and paste into the chat beside your dashboard.

Starter build

BUILD

Build a dashboard from the attached file for [audience]. It should help them decide [decision] every [cadence]. Answer: [Q1], [Q2], [Q3]. Lead with [headline metric].

Drill-down

BUILD

Clicking a [region] bar should filter every chart and table to it, with a chip to clear the filter.

Audience tabs

BUILD

Split this into tabs for [field teams], [programme leads] and [funders], each with its own link.

Funder scorecard

REPORT

Make a scorecard of four to six indicators. Each card shows the latest value, change since [last round], a small trend and the target of [target]. Only a missed target turns red.

Equity lens

REPORT

Add a gender and [social group] split to every outcome chart, and a tile showing the gap between the highest and lowest group.

Monthly review

REPORT

Add a tab for the monthly review: what changed since last month, the three sites that moved most, and open questions from comments.

Data quality monitor

QUALITY

Add a Data quality tab: missing values per column, duplicate [record ID] values, and data collectors whose averages sit more than two standard deviations from the rest.

Diagnose a number

QUALITY

The [metric] on the [tab] tab looks wrong. Re-run its source, check the formula, and explain exactly what it counts.

Go live

DATA

Replace the attached file with a live query on [connector and table], keeping every chart the same.

New round

DATA

Here is the [midline] export. Add it as a new round and update every chart and takeaway.

Play mode

PRESENT

Add a Play button that steps from [baseline] to [midline] to [endline], animating the bars and rewriting the headline at each step.

Scroll story

PRESENT

Add a Story tab that tells [programme] results in five short chapters beside one chart that changes at each chapter.

Pick the shape by reader and rhythm.



← Read once or at period end

Top: external audience · Bottom: internal team

Watched week after week →

Scorecard

Funders and leadership. Four to six indicators with change, trend and target.

[Make a scorecard of six indicators against targets](#)

Scroll story

Government or donor audiences. Chapters beside one chart that changes.

[Tell these results as a scroll story](#)

Data quality

Data teams during collection. Missing fields, duplicates, outliers.

[Add a monitor that flags enumerator outliers](#)

Table

Field coordinators looking up their own units.

[Give me a searchable site table](#)

Review

Stakeholders at period end. A few totals and one big chart with events marked.

[Turn this into an annual review page](#)

Funnel

Programme leads finding drop-off between stages.

[Show registered to completed as a funnel](#)

Board

Programme team watching delivery. One metric, every region, one scale.

[Show delivery for every region](#)

When something looks wrong.

Most problems have one of six causes.

■ A source didn't load

Usually: the reader hasn't connected the app, declined access, or lacks permission to the table.

Fix: follow the connect prompt on the page. If it still fails, ask Claude, who re-runs it and names who can grant access.

Say: The attendance source didn't load for Priya. Why?

■ A number looks wrong

Usually: a definition. What counts as "active" or "reached" differs from what you expected.

Fix: open its formula in Sources and tell Claude what it should count.

Say: Change should only count people measured in both rounds

■ The data looks old

Usually: an attached file or saved query that hasn't been refreshed.

Fix: attach the new file, switch to a live source, or set a schedule.

Say: Replace the survey file with this new export

■ A filter skips some charts

Usually: those charts read a source that doesn't use the filter.

Fix: ask for it to apply everywhere. A saved query can't follow a filter, so keep that source live.

Say: Make the region filter apply to every chart

■ It's cramped beside the chat

Usually: too many tiles in a row, or wide tables, at about 400 px wide.

Fix: fewer headline figures and a layout that stacks when narrow.

Say: Keep four tiles and make it read well on a phone

■ A viewer sees nothing

Usually: no Claude account, the dashboard is still private, or they signed in with a different email.

Fix: check the Share setting and ask them to sign in with the email you shared to. A free account is enough.

Say: Who can open this dashboard right now?

STILL STUCK?

Ask Claude to investigate

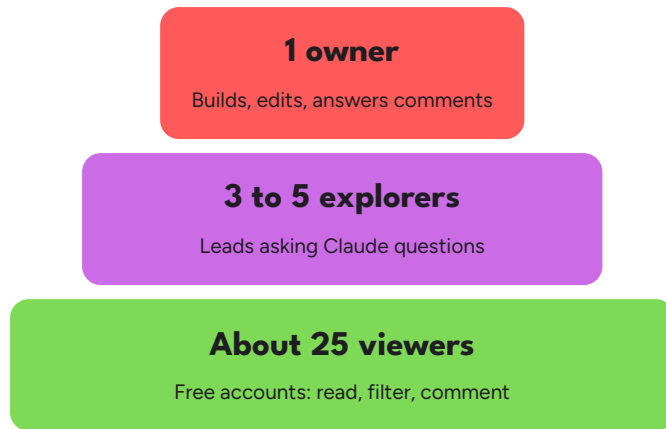
Claude can re-run any source, read its formula and tell you plainly what stops it and who can fix it. Describe what you see, not what you think is wrong.

Say: The gain tile shows 31 points but my sheet says 28. Find out why.

Viewing is free. Asking pays.

Every viewer needs a Claude account, and a free one is enough. AI features draw on the asker's own plan, never the owner's.

A TEAM OF 30, IN THREE TIERS



WHO PAYS FOR WHAT

Viewing and filtering No AI usage for anyone	FREE
Asking Claude The asker's own plan	ASKER
Comments to Claude The owner's session	OWNER
Live data Each viewer's connection	VIEWER

Pro or Max plan

Share as "only you" or "anyone with the link". Good for sample or aggregated data.

Team or Enterprise

Add named people or groups with view or edit access, plus admin controls.

A public audience

Point a branded address at the link, or publish a frozen snapshot on your own site.

PROTECT

The finer the data, the tighter the door.

PRIVATE Person-level rows Names, IDs and records per person stay in your secure system.	TEAM Site or team totals Small groups suppressed. Shared with named access.	PUBLIC Region or national totals Vetted headline figures for a public snapshot.
---	---	---

Strip names, phone numbers, ID numbers and addresses

Check your MoU or donor data terms first

Suppress groups smaller than 10 people

Label sample data on the page, every time

Three levels to the fullest use.

Most teams stop at level one. The real value sits in levels two and three.

LEVEL 1 • BUILDER

It answers

- Built from one attached file
- Four tiles and two charts
- One filter
- Every figure checked in Sources

Arrived when you trust every number

LEVEL 2 • PRACTITIONER

People use it

- Live data from a connected app
- Tabs and links per audience
- Click-to-drill and date ranges
- Named calculations with definitions
- Comments routed to Claude

Arrived when the team asks questions on it

LEVEL 3 • EVIDENCE LEADER

Partners rely on it

- Scheduled refresh, stale warnings
- A data quality tab in fieldwork
- Scorecard and Play mode for reviews
- A scroll story for the annual report
- Access reviewed each quarter
- A public snapshot of vetted totals

Arrived when the meeting opens the dashboard first

Twenty things to say to your dashboard

Layout

- | Split into Outcomes and Delivery tabs
- | Lead with the latest figure
- | Keep four tiles in the top row
- | Add a takeaway under the title

Data

- | Replace the file with this export
- | Use the live table instead
- | Define each metric on the page
- | Add a gender split everywhere

Charts

- | Swap this to a line chart
- | Add a 60% target line
- | Show a first to latest slope
- | Label lines at their ends

Present

- | Add a Play button by round
- | Make filter changes glide
- | Add a scroll story tab
- | Make a funder scorecard

Filters

- | Add a region dropdown
- | Add a date range, last 90 days
- | Clicking a bar filters everything
- | Add a Reset button

Launch checklist

☐ Decision sentence written

☐ Data aggregated and de-identified

☐ Metric definitions shown on the page

☐ Sharing setting checked

☐ Refresh schedule or live source set

☐ Three to five questions listed

☐ Every headline figure checked in Sources

☐ Viewers have Claude accounts

☐ Questions routed to comments

☐ An owner named for updates

QUESTIONS PEOPLE ASK

Do I need to know code or SQL?

No. You describe what you want and Claude writes the queries, formulas and page. Editors can see and edit queries in Sources.

Can readers download the data?

Yes, any source downloads as CSV from Sources, so aggregate and de-identify before you attach a file.

Can I turn it into a PDF?

Not from inside the dashboard. For a printable report, ask Claude for a document or slide deck from the same data.

How is this different from Power BI?

You build by conversation, and every reader can see the formula and rows behind a number, not only the author.

Who can change it?

Only people with edit access. Viewers read, filter and comment.

What if my data is in Excel?

Export the sheet as CSV and attach it, or keep it in Google Drive and connect Drive for live updates.

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Claude Dashboard Playbook, by HubForge

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