Made To Scale

FREE SKILL

The client visibility dashboard

See every client, where they stand, and who needs you this week.



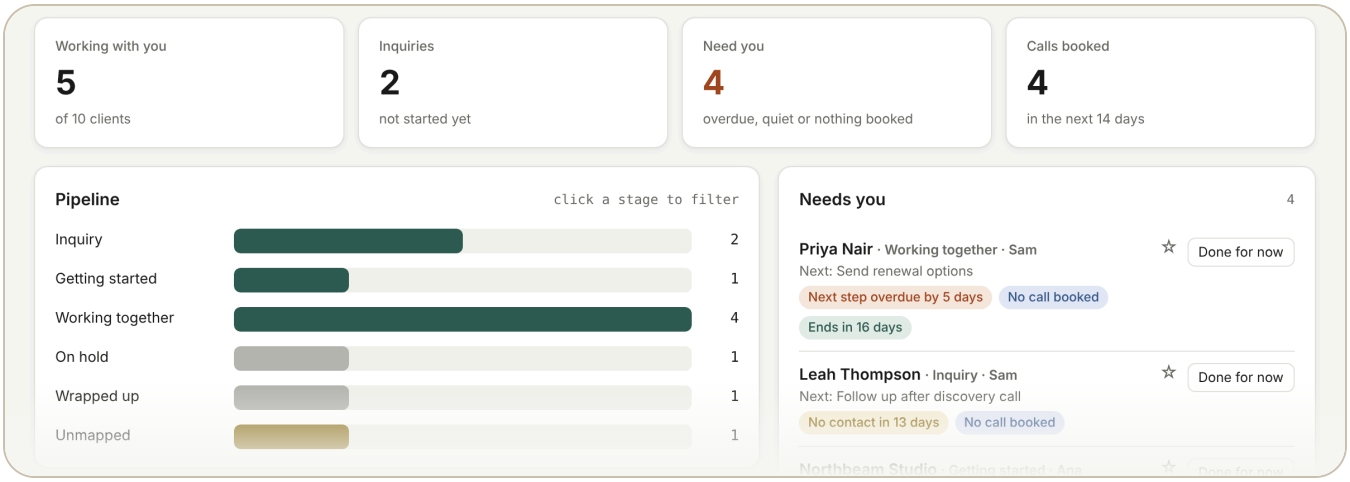
Made To Scale · Systems that grow with you
Updated November 2026

What you get

Short on time? Skip the steps and we will set it up for you, with your branding and your data. Details on the last page.

One page that answers the four questions every service business asks on a Monday morning:

- **How many clients are where?** Your pipeline, stage by stage.
- **Who needs me right now?** Overdue next steps, clients who have gone quiet, clients with no next step.
- **What is coming up?** Calls, due dates and renewals in the next 14 days.
- **What is the full picture?** A searchable, sortable list of every client.



The Overview view, built from fictional sample data.

It only reads your data

The skill never edits, moves or deletes anything in your tools. If something is missing from your data, the dashboard shows a gap. It does not guess. Stars, card order and "done for now" ticks are your own notes, kept in your browser.

What you need

- A Claude account with **skills** and **code execution** turned on.
- Your client list in a spreadsheet, a project board, a CRM or a database. A file on your computer works too (page 3).

Install the skill

1. **Download the ZIP.** Save `visibility-dashboard.zip` and leave it zipped.
2. **Open your skills.** In Claude, go to `Customize › Skills`.
3. **Upload it.** Click **+**, then **Create skill**, then **Upload a skill**, and choose the ZIP.
4. **Turn it on.** It appears in your skills list. Check that its toggle is on.

> **Tip.** On a Team or Enterprise plan, an owner may need to turn on skills and code execution for your organization first.

Where does your client data live?

Find your setup below. The row tells you which connector to add. You only need one.

YOUR CLIENTS LIVE IN	CONNECT THIS	WHAT CLAUDE READS
Google Sheets	`Google Sheets` or `Google Drive`	Your client tracker, one row per client
Excel in OneDrive or SharePoint	`Microsoft 365`	Your client workbook (see the heads-up on page 4)
Notion	`Notion`	Your clients database and its status property
Airtable	`Airtable`	Your clients table and its status field
Trello, Asana, ClickUp or monday.com	The matching connector	Each card or task is a client. Its list, section or status is the stage.
HubSpot	`HubSpot`	Contacts or deals, with their lifecycle or deal stage
A file on your computer, or any other tool	No connector	Export a CSV or Excel file and attach it in the chat

> **Heads up.** Anthropic's help pages say skills are available on Free, Pro, Max, Team and Enterprise plans. Its developer docs say Pro, Max, Team and Enterprise. Open `Customize › Skills` in your account to see whether you have it.

Connect it

1. **Open connectors.** In Claude, go to `Customize › Connectors`.
2. **Pick yours.** Find the connector from your row on page 3 and click it.
3. **Sign in.** Click **Connect** and sign in to that tool.
4. **Review and approve.** Read the access it asks for. Claude can only see what your own account can see.

Tip. On a Team or Enterprise plan, an owner adds the connector for the organization first. Then each person connects their own account.

Heads up on Microsoft 365. A personal Microsoft account (Outlook and OneDrive) connects on its own. A work or school account needs a one-time approval from your Microsoft admin. If Claude cannot read your workbook cleanly, attach the .xlsx file instead.

Optional extras

These fill in details your tracker might not have. Add them only if you want to.

ADD	WHAT IT FILLS IN
`Google Calendar` **or Outlook**	Booked and past calls, matched by client name or email. Shows calls on the board and flags anyone with no call booked
`Gmail` **or Outlook**	The last time you emailed each client (dates only)
`Slack`	Last activity, if you keep one channel per client

Using something else?

Any other source, or anything else you want from your data, such as different numbers, other views or your own branding: **we can customize it**. Tell us what you use and what you want to see. Details on the last page.

Your first dashboard

Start a new chat and type:

TYPE THIS

```
Build my client dashboard.
```

The first time, Claude asks a few quick questions. The dashboard then uses your words, not ours:

1. **Your business name.**
2. **Where your clients live.** It shows the connectors you have added.
3. **Your stages, in order.** Your own words, such as Inquiry, Working together, Wrapped up. Claude picks them up from your data.
4. **What "gone quiet" means.** The default is 14 days without contact for people you are working with and 7 for new inquiries.
5. **What you call people and things.** Client, member, patient or student. Your column names carry over.
6. **Your calendar, if you want it.** Link it to see booked calls and who has none.
7. **Which view opens first.** Overview, Board or Weekly brief (pages 6 and 7).

Claude then reads your data, builds the dashboard, checks a few clients against your source, and tells you who to act on first.

Save your setup

After the first run, Claude gives you a short **Dashboard Profile**. Keep each dashboard file too: next time, Claude can show what changed since. Create a Claude Project called "Client Dashboard" and paste the profile into the project's instructions. From then on, inside that project:

EVERY WEEK

```
Refresh my dashboard.
```

Using a different AI assistant?

The skill is a plain folder, so it is not tied to Claude. Attach the ZIP and an export of your client list to a chat and type `Unzip this, read SKILL.md and follow it`. Your assistant needs to open files and run Python.

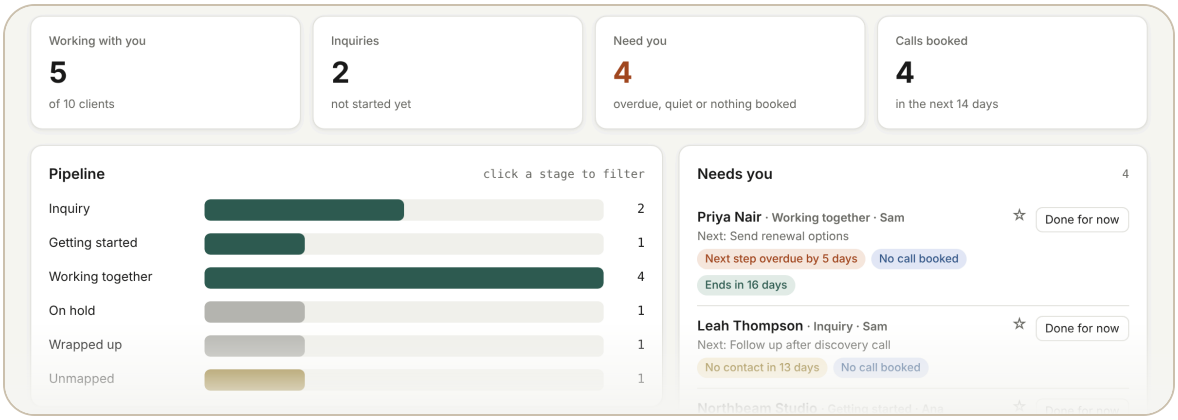
Three ways to see your clients

Every dashboard includes all three views. Switch between them with the tabs at the top of the page, and tell Claude which one to open first.

OPTION 1

Overview

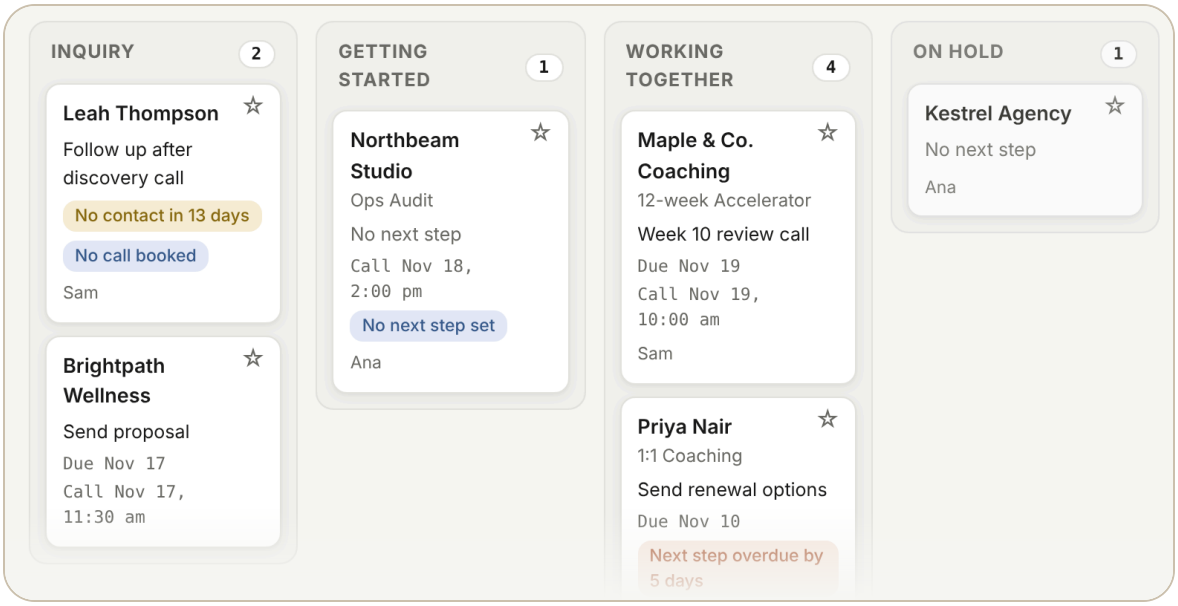
Best for a quick check-in. Numbers up top, your pipeline stage by stage, who needs you, and a searchable list of every client.



OPTION 2

Board

Best for seeing the whole flow. One column per stage and one card per client. Drag cards to set your own order and star the ones to focus on. Cards stay in their stage, because stages come from your data.

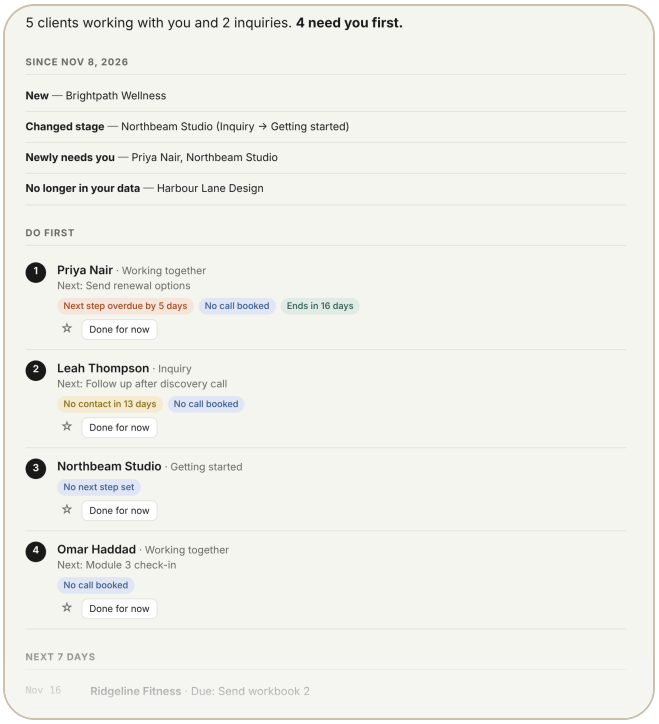


Cropped to fit the page. The full board has a column for every stage.

OPTION 3

Weekly brief

Best for Monday morning, or printing. A short list: do these first, what is coming in the next seven days, and where everyone stands.



Cropped to fit the page.

Which should you start with?

Overview

If you want the numbers and the full client list in one place.

Board

If you think in stages and like to see who sits where.

Weekly brief

If you want a checklist for the week and nothing else.

You can change your mind at any time. All three views use the same data.

Want a view of your own?

The free skill covers the essentials. In a custom setup, we change what you need to match how your business runs:

Your KPIs

Track the numbers you use, such as renewals due or calls this month.

Your branding

Your name, colours and logo on every view.

Your data

Pull from where you keep things: Notion, Airtable, Google Drive or Microsoft 365.

Your views

Add a view for a single program, a cohort or a team member.

If something looks off

YOU SEE	DO THIS
Claude does not use the skill	Check its toggle is on in `Customize › Skills`, then ask again using the word "dashboard".
"I can't run code"	The skill needs code execution. Turn it on in your settings, or ask your organization's owner.
It cannot find your file or board	Tell Claude its exact name. Make sure the connected account can open it.
Clients marked "Unmapped"	Their status did not match a stage. Tell Claude which stage it means, and add it to your Dashboard Profile so it sticks.
The dashboard looks out of date	It is a snapshot of the day it was built. Type `Refresh my dashboard`. After 7 days the page reminds you.
Nobody shows as "gone quiet"	You may not have a last-contact date. Add the column, or connect your email or calendar.
A number looks wrong	Ask: "Show me the rows behind that number." Fix it at the source, then refresh.

Your data, your control

The skill only reads. You can disconnect any connector at any time in `Customize › Connectors`.

Prevent most problems

Most of the issues above come from missing data. These four columns in your tracker avoid them.

Status

Any stages you use. The dashboard shows your words.

Next step

The one thing that happens next with this client.

Due date

When that next step is due.

Last contact

The date you last spoke. It powers the "gone quiet" alerts.

Made To Scale

Want it built around how you work?

This free version covers the essentials. We can set it up for you, so you skip the steps, and shape it around your business.

- Your KPIs, your branding and your views
- Pulled from the tools you already use
- More skills for the rest of your operations

TELL US ABOUT YOUR SETUP

Book a call: calendly.com/ridakhan-mts
Send your details: form.typeform.com/to/tGJw8UGN

Or email ridkhan.mts@gmail.com

The call is twenty minutes. We reply within two business days.