Before You Ask For A Dashboard Or AI Summary

General Assembly — Reference question set

Ask these first

1. What decision or action should this support?
2. What existing report, dashboard, or note already gets close?
3. How fresh does the source data need to be?
4. What cut, segment, threshold, or comparison actually matters?
5. Is the right output a dashboard, a one-off extract, or a short written brief?
6. What source, lineage, or transformation note must stay visible?
7. What label, audience, or handling constraint applies?
8. Who owns the output and who will review it?
9. If AI is involved, how will the output be verified and where will the source be checked?
10. What would make the result unsafe to use?

Route the request properly

One-off analysis, recurring reporting, new pipeline work, and governed automated outputs are different request types and should not be treated as the same thing.