

# Course: The Automated Empire: Scale to 6-Figures on Autopilot

## Lesson 11: Building Your "5-Minute" Status Dashboard

### 1. Core Concept & Learning Objective

**Core Concept (149 words):** You have built an empire of *actions*. Now you need a "cockpit" to *monitor* them. You're "drowning in data" that's scattered across 10 apps. A "5-Minute Dashboard" solves this. It's a *Single Pane of Glass*, built inside your Operations Hub (Notion/Airtable), that gives you a complete overview of your business health (Leads, Sales, Tasks) in one glance. This isn't a *new* database; it's a new, "read-only" *view* of the data you *already have*. This is the payoff. It's how you move from "frantically checking 10 tabs" to "calmly reviewing one dashboard" every morning.

**Learning Objective:** By the end of this lesson, you will be able to **use** advanced database views (like "Kanban" and "Calendar") and **build** a centralized, "5-Minute" dashboard page in your Operations Hub that provides a "single-glance" overview of your entire business health (leads, sales, and tasks).

### 2. Interactive Content Activities

#### Activity 1: Case Study: "The '10-Tab Check-In' Burnout"

- **Type:** Case Study Analysis
- **Time:** 15 minutes
- **Instructions:**
  1. Read the scenario: "It's 9 AM. 'Founder Ben' wants to know 'what's going on' in his business. He opens: 1. His email. 2. His calendar. 3. His Stripe dashboard. 4. His Google Analytics. 5. His Trello board. 6. His ConvertKit dashboard. 7. His 'Leads' Google Sheet... It's 10:15 AM. He is exhausted, hasn't *done* anything, and still doesn't have a clear, connected picture."

2. In the text box, answer: "What is the *real* problem here? How does a 'Single Pane of Glass' (one dashboard) solve this '10-Tab' burnout?"

- **Expected Outcome:** A clear understanding of the *time and energy* cost of a "scattered" system, and the value of a single, centralized "view."

### Activity 2: Tool Exploration: "The 'Kanban' & 'Calendar' Views"

- **Type:** Tool Exploration
- **Time:** 20 minutes
- **Instructions:**
  1. Log in to your Operations Hub (Notion/Airtable).
  2. Go to your "Projects" database (from Lesson 3). It's probably in a "Table" view.
  3. Create a *new view* for that *same database*.
  4. Change the "Layout" to "Board" or "Kanban."
  5. Set the "Group By" option to your "Status" property. Watch as your projects magically organize into "To-Do," "In Progress," and "Done" columns.
  6. Now, create *another* new view. Change the "Layout" to "Calendar." Set the "Date" property to your "Deadline."
- **Expected Outcome:** The "a-ha" moment of database "views": It's all the *same data*, just visualized in different, powerful ways.

### Activity 3: Tool Exploration: "The 'Rollup' (The 'Boss-Level' Metric)"

- **Type:** Tool Exploration (Advanced)
- **Time:** 20 minutes
- **Instructions:**
  1. Go to your "Projects" database. Add a "Project Value" (Number) property. (e.g., \$1000, \$5000).
  2. Go to your "Clients" database (if you don't have one, make one and "relate" it to your projects).
  3. In your "Clients" database, create a new property. Select "Rollup."

4. Set the "Relation" to your "Projects" database.
  5. Set the "Property" to "Project Value."
  6. Set the "Calculate" to "Sum."
  7. You now have a "Total Client Value" field that *automatically* calculates the total value of all projects for that client.
- **Expected Outcome:** A glimpse into the true power of your Hub: it can *do math* for you and show you high-level "summary" metrics.

#### Activity 4: "My #1 'Dashboard' Metric" (Peer Collaboration)

- **Type:** Peer Collaboration / Discussion
- **Time:** 10 minutes
- **Instructions:**
  1. Go to the community discussion board.
  2. **Post:** "If my '5-Minute Dashboard' could only show me *one* thing, it would be [YOUR #1 METRIC]."
  3. **Example:** "1. 'New Leads Today'." "1. 'Cash Collected This Week'." "1. 'Overdue Tasks'."
  4. Reply to one other student's metric and state *why* that's a good one.
- **Expected Outcome:** Clarity on what "Key Performance Indicators" (KPIs) really matter, which will inform what to *put* on the assignment dashboard.

### 3. Assignment & Project Milestone

#### Assignment: "The Cockpit" Dashboard v1.0 (Component 11 of Final Project)

- **Estimated Time:** 90 minutes
- **Deliverable:** A public "share" link to your new "5-Minute Dashboard" page (in Notion or an Airtable Interface).
- **Description:** You will build the "cockpit" of your empire. This is *not* a new database. It is a new, blank page where you will *embed* linked "views" of your other databases. This is your "Single Pane of Glass."
- **Step-by-Step Instructions:**

1. **In your Operations Hub:** Create a new, blank page. Title it "[Your Name]'s 5-Minute Dashboard."
  2. **Section 1: "My Tasks":**
    - Embed a "Linked View" of your "Tasks" database.
    - Set the "Layout" to "Calendar" (to see deadlines) OR "List" (filtered to "Show me tasks 'Due Today'").
  3. **Section 2: "My Projects":**
    - Embed a "Linked View" of your "Projects" database.
    - Set the "Layout" to "Kanban" (Board) and "Group By: Status." This gives you the "To-Do, In-Progress, Done" view.
  4. **Section 3: "My Leads" / "My Content":**
    - Embed a "Linked View" of your "Leads" database (if you have one) OR your "Content" database.
    - Set the "Layout" to "Table" (for leads) or "Gallery" (for content).
  5. Organize the page so it's clean and readable.
  6. Submit the public "share" link. This is Component 11.
- **Connection to Final Project:** This *is* the "Dashboard" module of your playbook. It's the "payoff" for all the data you've been collecting, turning raw data (tables) into actionable intelligence (Kanban boards, calendars).
  - **Evaluation Criteria:**
    - **Excellent:** The link opens a *single page* that clearly shows at least 3 "embedded" or "linked" views of *other* databases (e.g., Tasks, Projects, Content).
    - **Proficient:** The link opens a page with 1-2 "embedded" views, or it's just a *copy* of a database, not a "linked view."
    - **Needs Improvement:** The link is just to a single database (like your "Projects" table), not a new "dashboard" page.

#### 4. End-of-Lesson Assessment

(Multiple Choice 1) What is a "Single Pane of Glass" or "5-Minute Dashboard"?

- A. A new, expensive analytics software you must buy.
- B. A single page in your Operations Hub that embeds *views* of all your key data (leads, projects, tasks).
- C. A "Run History" log in Zapier.
- D. A new database for tracking your "Key Performance Indicators." (*Answer: B*)

(Multiple Choice 2) The "Kanban" (Board) view in Activity 2 is *most* useful for:

- A. Seeing your deadlines on a calendar.
- B. Calculating the "Sum" of your project values.
- C. Visually tracking the *status* (e.g., "To-Do," "In Progress") of your projects.
- D. Storing your client's email addresses. (*Answer: C*)

(Multiple Choice 3) What was the "a-ha" moment of Activity 2 (Kanban & Calendar Views)?

- A. That you need to create 3 separate databases for tasks, projects, and calendars.
- B. That one database ("Projects") can have *multiple views* (Table, Board, Calendar) of the *same data*.
- C. That Notion is better than Airtable.
- D. That a "Rollup" is the only metric that matters. (*Answer: B*)

(Multiple Choice 4) In the "10-Tab Check-In" case study, the founder's *real* problem was:

- A. He had too many clients.
- B. He wasn't tracking his data.
- C. He was tracking his data, but it was "scattered," so he had no clear, connected picture.
- D. He didn't have a good "To-Do" list. (*Answer: C*)

(Short Answer 1) What is a "Rollup" field (from Activity 3)?

- *(Example Answer: It's an advanced property that "rolls up" data from a related database. For example, it can "Sum" the "Project Value" of all projects linked to a client.)*

**(Short Answer 2)** On your "5-Minute Dashboard" assignment, what "View" are you most excited about?

- *(Example Answer: The "Kanban" (Board) view of my "Projects." Seeing them as cards I can drag from "To-Do" to "Done" is so much more intuitive than a spreadsheet.)*

**(Scenario-Based 1)** You want to see a "Tasks Due This Week" view on your new dashboard.

1. What "Database" would you be "linking" to?
2. What "Layout" would you use?