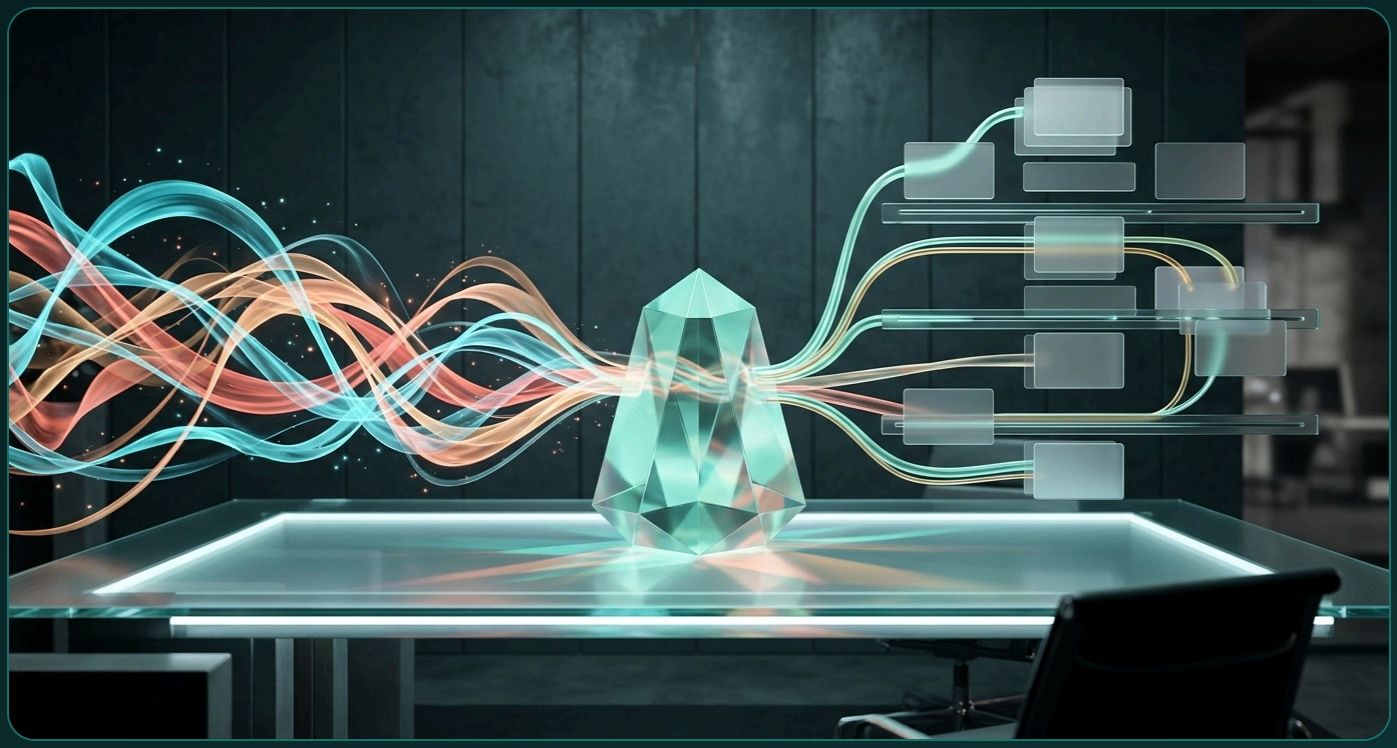
ANTHROPIC CLAUDE & WORKSPACE STUDIOS • FIELD GUIDE

Claude Whiteboards

Turning messy voice and text brainstorms into real-time multiplayer visual canvases—mastering region-box prompting, retro clustering, Doc and Slide handoffs, and Miro or Lucid exports.

- Voice-to-Board Structuring
- Region-Box AI Prompting
- Real-Time Multiplayer
- Retro & Theme Clustering
- 1-Click Doc & Slide Handoff
- Miro, Lucid & Vani Export



Win the First 30 Minutes

Speak a rambling product monologue or drop 80 raw sticky notes and watch Claude organize clean swimlanes, owners, and themes in seconds.

Surgical Region Edits

Drag a selection box around any messy corner of a massive board to expand sub-flows or assign dates without disturbing surrounding work.

Zero-Copy-Paste Handoffs

Turn finished spatial boards directly into polished Claude Docs, executive Slide Decks, or editable Lucid, Miro, and Zoho Vani canvases.

Conquering the “Messy First 30 Minutes” of Team Work

Traditional diagramming tools assume you already know which boxes and arrows belong on the screen, leaving teams staring at an intimidating blank grid. Anthropic built **Claude Whiteboards** as an AI-native, multiplayer thinking canvas inside the Artifacts studio—where raw human thought meets live spatial structure.

Quick Navigation

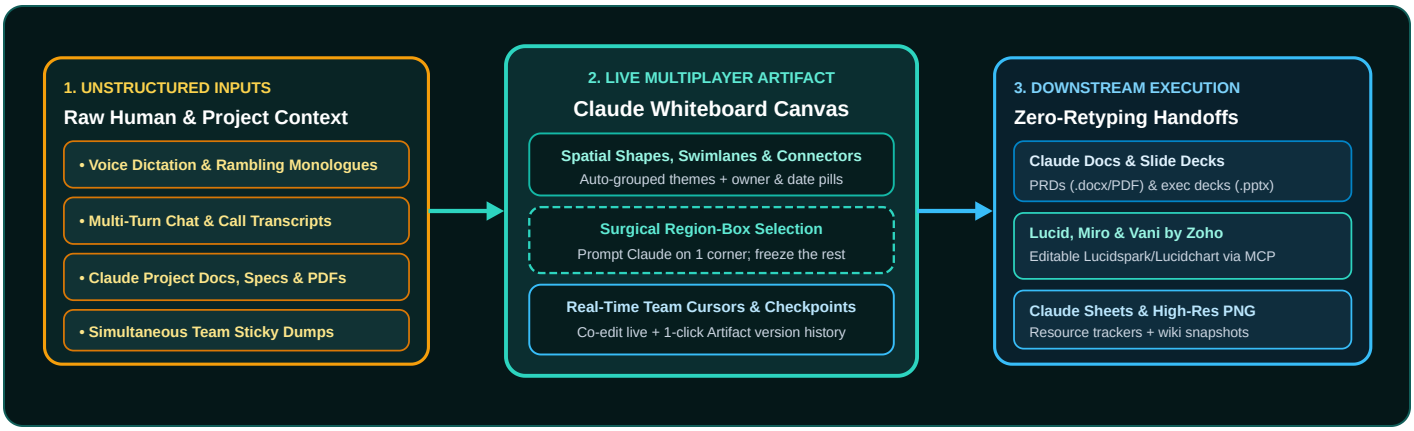
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Golden Rule: Dump Fast, Scope Edits by Region All

Why an AI-Native Thinking Canvas Beats Static Diagramming

In real kickoff meetings, ideas arrive out of order: half-finished spoken sentences, pasted Slack threads, customer interview snippets, and simultaneous teammate sticky notes. Rather than forcing someone to play “box-aligning scribe” while everyone else watches, Claude Whiteboards sits directly beside your conversation and active **Claude Project** knowledge base. Everyone co-edits shapes in real time while Claude clusters duplicates, maps dependencies, flags missing owners, and converts settled layouts into shipping documents or enterprise diagrams.

Architecture: From Unstructured Inputs to Downstream Execution



Not a Replacement for Enterprise Diagramming—The Turbocharger Before It

Anthropic designed Whiteboards to solve early-stage synthesis, then hand off cleanly via `Share → Export → Send to` when your diagram needs long-term governance, Jira data-linking, or 500-node architectural maintenance inside Lucid or Miro.

Plans, Activation & Visual Workspace Decision Matrix

Claude Whiteboards runs as an interactive spatial Artifact across web (`claude.ai`), Claude Desktop (macOS and Windows), and mobile apps—with distinct default switches depending on your subscription tier.

1 Plan Availability & Admin Defaults (Beta)

- **Pro, Max & Ultra Plans:** Enabled automatically (beta) for personal spatial brainstorming, voice-to-board layouts, and PNG/Lucid/Miro exports.
- **Team Plan:** Enabled **on by default** with real-time workspace multiplayer sharing and **Claude Meetings** (beta) live Google Meet whiteboard building.
- **Enterprise Plan:** Turned **off by default** for strict compliance; an **Owner or Primary Owner** activates it in `Organization settings → Artifacts`.
- **Mobile & Tablet:** View live boards, tap sticky notes, and dictate voice updates from iOS or Android on the go.

2 Ways to Launch a Whiteboard

1. **Direct Natural Prompt:** Ask in any chat: *"Create a Claude Whiteboard mapping our Q3 onboarding redesign by owner and week."*
2. **Inside a Claude Project (Best):** Open a Project loaded with specs and research first so every sticky and swimlane reflects real product context.
3. **Artifacts Studio or Live Call:** Pick **Whiteboard** in `Artifacts`, or invite **Claude Meetings (beta)** into Google Meet (Team/Enterprise) to build boards live on the call.

Enterprise IT Quick-Enable Path (30 Seconds)

1. Sign in as Primary Owner → `Organization settings → Capabilities` (verify Artifacts & file creation are active). 2. Open `Organization settings → Artifacts` and toggle **Claude Whiteboards** to `Enabled`. 3. Under `Connectors / Integrations`, approve the official **Lucid MCP**, **Miro**, or **Vani** handoff targets approved by security.

Visual Workspace Decision Matrix: Picking the Right Surface

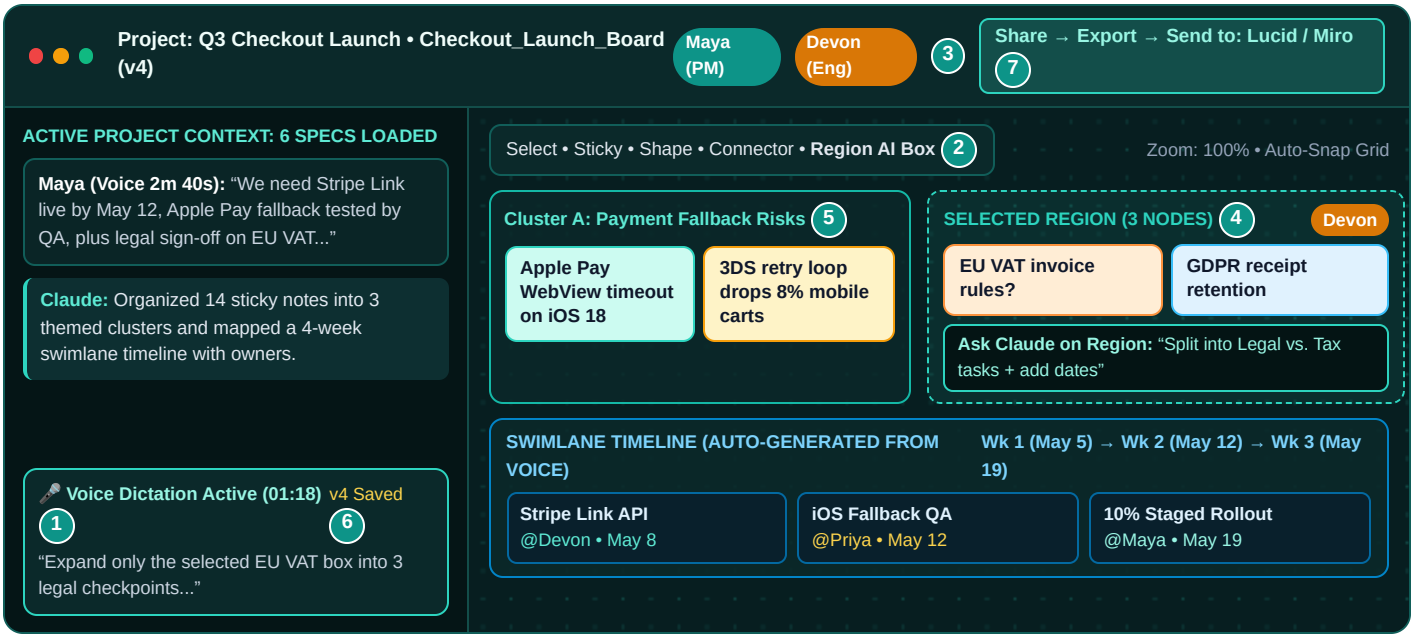
Workspace Tool	Early Ideation Speed	AI Synthesis & Clustering	Multiplayer Workshops	Long-Term Hosting
Claude Whiteboards *Spatial AI Canvas*	**Fastest (Seconds):** Speak or paste messy notes directly into structured lanes.	**Native + Region-Scoped:** Clusters stickies & edits single corners on command.	**5–25 Live Teammates:** Shared cursors, live stickies, and instant AI grouping.	**Medium:** Ideal for active sprints; hand off evergreen maps to Lucid/Miro.
Miro / Lucid *Enterprise Canvas Suite*	**Manual Setup:** Rich templates, but slower when starting from raw transcripts.	**Add-on AI Helpers:** Lacks full Claude Project context & chat thread memory.	**50–200+ Participants:** Enterprise voting timers, breakout boards & facilitation.	**Gold Standard:** System-of-record governance, Jira/AWS live data links.
Mermaid / React Artifacts *Code-Driven Diagrams*	**Fast for Strict Trees:** Great for deterministic sequence or ER diagrams.	**Full Regenerate Only:** Hard to drag a single node manually during a call.	**Single-Author View:** Viewers cannot drop freeform sticky notes together.	**Git-Friendly:** Easy to commit Mermaid text straight into repo docs.
Claude Sheets *AI Spreadsheet Builder*	**Tabular First:** Best once categories, budgets, and formulas are known.	**Cell-Level Formulas:** Excels at quantitative scoring, headcount & KPI models.	**Structured Review:** Built for sorting and modeling, not spatial sticky storms.	**Operational Tracker:** Exports cleanly to `.xlsx` or pairs with Claude Data.

The Winning Two-Stage Habit: Diverge in Claude Whiteboards, Govern in Lucid or Miro

Run the chaotic first 30 minutes of every kickoff, retro, or architecture review inside **Claude Whiteboards** where voice dictation and Project context eliminate blank-canvas paralysis. Once the structure locks in, export to a **Claude Doc** for sign-off and push the diagram to **Lucid** or **Miro** for quarterly tracking.

Annotated Tour: Inside the Claude Whiteboards Studio

Opening a Whiteboard splits your Claude window into a conversational steering column on the left and an infinite, zoomable multiplayer canvas on the right—keeping dialogue and spatial layout synchronized.



1 **Voice & Chat Brain-Dump Bar:** Dictate raw plans via microphone or paste transcripts; Claude grounds layouts in active Project files.

2 **Spatial Tool Dock:** Add manual sticky notes, flow shapes, directional connectors, or switch to the Region AI selection tool.

3 **Live Multiplayer Presence:** See teammate avatars, follow live cursors during critiques, and drop stickies simultaneously with zero lag.

4 **Region Selection Box:** Drag a dashed frame around specific stickies to prompt Claude locally while locking the rest of the board.

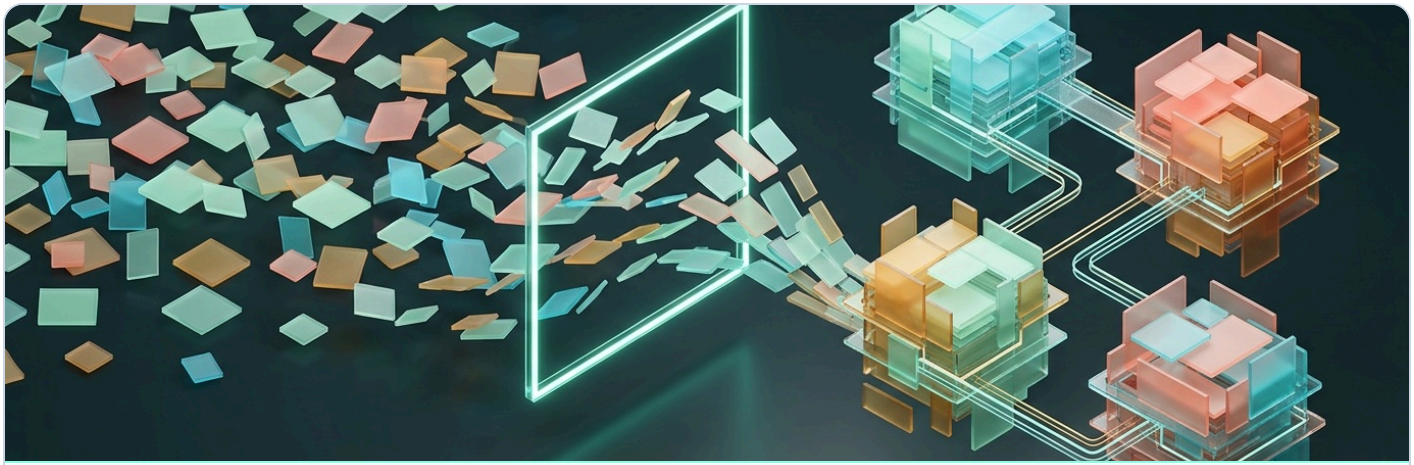
5 **Themed Clusters & Swimlanes:** Auto-sorted sticky islands and horizontal schedule tracks complete with `@Owner` and date pills.

6 **Artifact Version Picker (`v1..vN`):** Every AI layout pass saves a snapshot so you can compare or revert bold restructures in one click.

7 **Share, Doc/Slide Convert & External Export Menu:** Invite workspace collaborators, ask Claude in chat to turn the board into a Doc or Slide Deck, or run `Share → Export → Send to: Lucid / Miro / Vani` (plus high-res PNG).

Voice & Text Brain Dumps to Structured Swimlanes

The fastest way to build a complex whiteboard is not touching your mouse at all. Speak out loud for three minutes—backtracking, correcting dates, and thinking on your feet—and let Claude untangle the chronology into crisp spatial swimlanes.



From Raw Stream-of-Consciousness to Spatial Clarity: Claude parses unstructured spoken monologues or pasted Slack dumps, strips filler, groups related ideas into color-coded islands, and wires directional dependencies automatically.

The 4-Step Voice-to-Board Workflow

1 Open Inside a Claude Project First

Start your chat inside a **Claude Project** containing your team roster, Q2 OKRs, or technical architecture docs. When you say *"assign backend auth to the payments lead,"* Claude resolves real names and service boundaries from Project memory.

2 Speak Unedited for 2–4 Minutes

Click the microphone icon in Claude Desktop, web, or mobile. Talk naturally through goals, blockers, dependencies, and rough dates. Do not self-edit—mid-sentence corrections like *"actually move QA before legal review"* are resolved cleanly.

3 Request Explicit Spatial Topology

End your dictation with one clear layout instruction: ask for **horizontal swimlanes by team**, a **left-to-right dependency graph**, or a **2x2 impact-vs-effort matrix** with `@Owner` and target date badges on every card.

4 Audit Missing Gaps Immediately

Follow up with: *"Highlight any milestone missing an upstream dependency or owner in coral amber."* Claude visually flags blind spots on the canvas before a single ticket is filed.

```
Prompt after a 3-minute voice brain dump (grounded in active Claude Project):
"Turn what I just dictated into a Claude Whiteboard organized as 4 horizontal swimlanes (Backend, Frontend,
Legal/Compliance, GTM) across Weeks 1-6. Cross-check our Project's Q3 Architecture Spec to fill exact service
names, place @Owner and target-date pills on every card, draw solid arrows for hard blockers, and add a coral 'Open
Risks' cluster in the top-right for anything I left ambiguous."
```

Pro Tip: Chunk Long Recordings into 3-Minute Chapters

Browser and OS voice dictation buffers perform best in focused 2-to-4-minute bursts. Dictate Phase 1 to generate your initial board skeleton, inspect the lanes visually, then click the microphone again to layer edge cases and risk mitigations onto the existing canvas.

Surgical Region-Box Prompting & Spatial Anatomy

Early AI diagram tools suffered from a maddening flaw: asking the AI to tweak three nodes triggered a full-board regeneration that scrambled everything your team spent twenty minutes arranging. **Region-Box Prompting** solves this permanently.

How Region-Box Selection Works

1. Select the **Region Box** cursor (or Shift-drag across any cluster of stickies, lanes, or connectors).
2. A glowing dashed frame locks onto only the enclosed items (for example, 9 messy onboarding stickies in the bottom-left corner of a 70-node canvas).
3. Type or dictate your instruction in the inline region prompt bar or main chat.
4. Claude reads full board context for awareness, **mutates only the bounded region**, and leaves every coordinate outside your box untouched.

4 High-Leverage Region Moves

- **Local De-Duplication:** Lasso 25 overlapping retro stickies → *"Merge duplicates into 4 crisp theme cards with vote counts."*
- **Sub-Flow Expansion:** Box one high-level `Checkout API` node → *"Expand into auth, webhook, and retry sub-steps."*
- **Owner & Effort Tagging:** Select one swimlane → *"Add T-shirt sizing (`S/M/L`) and owners from our roster."*
- **Devil's Advocate Critique:** Select a happy-path branch → *"Attach coral sticky notes showing top 3 failure modes."*

The 5-Part Spatial Whiteboard Prompt Anatomy

Whether generating a fresh board or refining a lassoed corner, combining these five color-coded building blocks produces clean, readable layouts on the first pass:

[1. Selected Region / Context] Within the lassoed *"Enterprise SSO Migration"* corner (referencing `Auth_RFC_v2.pdf` in this Project), **[2. Layout Topology]** reorganize these 11 rough sticky notes into a left-to-right 3-stage sequence (`IdP Config → Token Exchange → Cutover`) with directional blocker arrows. **[3. Node Metadata]** Format every card under 12 words with an `@Owner` pill, target sprint tag, and `S/M/L` effort badge. **[4. Grouping Rule]** Color-code cards mint for engineering work, amber for external customer IT dependencies, and rose for security sign-offs. **[5. Preservation Guardrail]** Keep all nodes, connectors, and swimlane headers outside this selection box strictly unchanged.

Prompt Component	What It Controls on the Canvas	Failure Mode When Omitted
Selected Region / Context	Binds edits to lassoed nodes + names specific Project docs to ground terminology.	Claude re-layouts the entire board or invents generic placeholder task names.
Layout Topology	Chooses spatial geometry: swimlanes, 2x2 grid, tree, funnel, or radial hub.	Defaults to flat sticky columns when a timeline or dependency flow was needed.
Node Metadata	Caps sticky word count (`≤12 words`) and attaches owner, date, or effort pills.	Stickies turn into 60-word paragraphs that require zooming to 250% to read.
Grouping Rule	Assigns deterministic card colors by risk level, department, or customer persona.	Random decorative colors that carry zero visual meaning during a review.
Preservation Guardrail	Explicitly freezes approved lanes, manual annotations, and external anchors.	Adjacent clusters shift coordinates or reword carefully negotiated phrasing.

The 12-Word Sticky Rule for Crisp Readability

Spatial boards work because the eye scans shapes faster than prose. Always instruct Claude: *"Keep card titles under 12 words; put detailed acceptance criteria only when we convert the board into a Claude Doc."*

Running Live Multiplayer Workshops & Retrospectives

In a standard 45-minute sprint retrospective, teams burn 25 minutes silently typing stickies and dragging similar cards into piles—leaving barely 10 minutes to solve actual problems. Multiplayer Claude Whiteboards compresses sorting to 20 seconds.

The 30-Minute AI-Accelerated Team Workshop Playbook

1 Min 0–7: Silent Dump

Share the workspace Whiteboard link in Slack or Zoom. All 5–25 teammates join with live cursors and drop raw, unedited sticky notes into a shared **Staging Zone** simultaneously—typos, shorthand, and duplicates welcome.

2 Min 7–12: AI Clustering

The facilitator lassos the Staging Zone and prompts Claude to group stickies into 4–6 named themes, preserve original author initials so nobody feels erased, and surface **hidden contradictions** across teams.

3 Min 12–30: Action Lock

Spend 60% of the call debating the top two themes. Lasso the winning cluster and ask Claude to generate concrete **Next-Sprint Action Cards** with single owners and Friday verification dates.

Three High-Impact Multiplayer Ceremonies

Team Ceremony	How Teammates Contribute Live	Facilitator's Region-Box Prompt to Claude
Sprint Retrospective *(5–20 Engineers/PMs)*	Drop raw *Went Well*, *Friction*, and *Surprise* stickies into one open intake zone for 6 minutes.	*"Cluster these 65 stickies into 5 root-cause themes, count mentions per theme, keep author initials, and flag where Eng and Design disagree."*
Design & Copy Critique *(Product, Design, Mktg)*	Place screen flow cards in the center; reviewers drop feedback stickies directly around target steps.	*"Lasso Step 3 Checkout: separate cosmetic UI polish from blocking UX usability bugs, and draft 3 testable copy alternatives."*
SEV-1 Postmortem *(SRE, Backend, Support)*	Paste PagerDuty timestamps, Slack alerts, and customer ticket spikes onto the left side of the board.	*"Arrange into a minute-by-minute UTC incident timeline with causal arrows, then build a 5-Whys tree and P0/P1 remediation lane."*

Facilitator Etiquette: Keep Raw Stickies Beside Synthesized Clusters

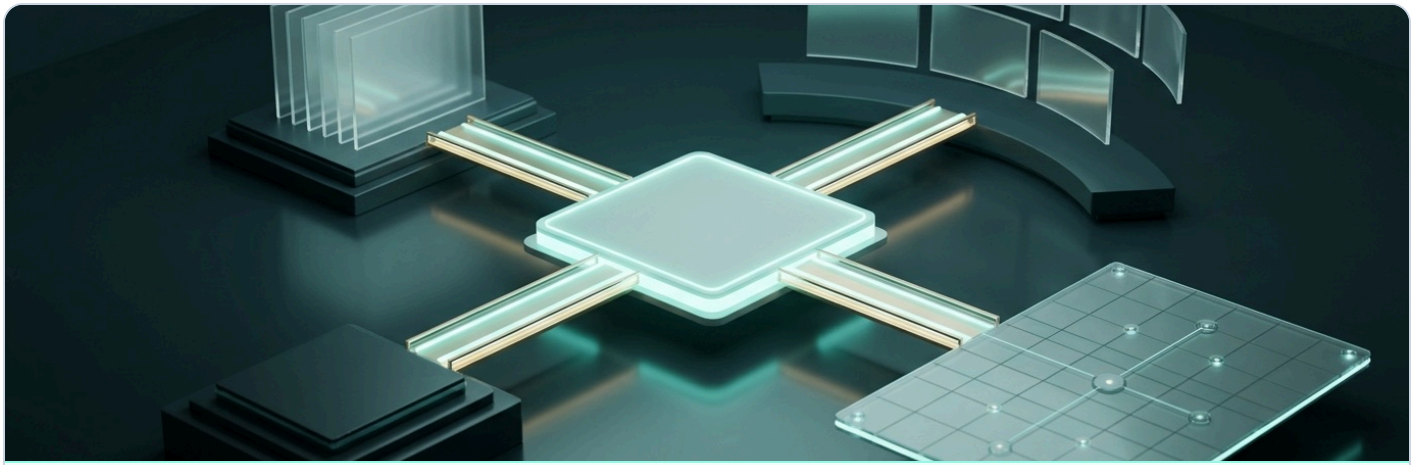
Never let AI silently delete a teammate's raw sticky during a live workshop—people lose trust if their exact wording vanishes. Instead, save a quick version checkpoint first and instruct Claude: *"Create synthesized theme headers above each group and stack the original verbatim teammate stickies neatly underneath each header."* Everyone sees their voice preserved while gaining instant executive structure.

Surface "Silent Tensions" That Polite Meetings Miss

One of Claude's sharpest facilitation superpowers is spotting opposing assumptions across sticky notes—for example, Marketing assuming self-serve signup in May while Security assumes manual enterprise approval. Ask: *"Draw a dashed red tension connector between any two stickies on this board that make conflicting assumptions."*

Downstream Handoffs: Docs, Slides, Miro & Lucid

Most brainstorm boards die five minutes after the Zoom call ends because nobody wants to spend Friday afternoon re-typing 60 sticky notes into a PRD, slide deck, or architecture tool. Claude Whiteboards turns spatial consensus directly into deliverables.



One Spatial Source, Three Shipping Formats: Convert any settled Whiteboard directly into a structured Claude Doc (`.docx`/PDF), an executive Slide Deck (`.pptx`/PDF), or a live editable canvas inside Lucid, Miro, or Vani by Zoho.

1 Native Claude Docs & Slide Decks

- **Board → Structured PRD / RFC Doc:** Prompt in the chat thread: *"Turn this Whiteboard into a formal PRD Artifact with Problem, Scope by Swimlane, Risks, and Owner Table."* Download as `.docx`, Markdown, or PDF.
- **Board → Executive Slide Deck:** Prompt: *"Convert our clustered board into an 8-slide leadership deck (.pptx) with one slide per swimlane and a final decision ask."*
- **Region-Only Export:** Lasso just the `Q3 Action Items` lane to generate a crisp weekly status memo without background brainstorm noise.

2 External Canvas Sync: Lucid, Miro & Vani

- **Send to Lucid (via Official Lucid MCP):** Click `Share → Export → Send to: Lucid` to open your board as a **fully editable** Lucidspark or Lucidchart document—preserving shapes, connectors, and text for enterprise data-linking and voting.
- **Send to Miro:** Export spatial clusters and swimlanes straight into an existing team Miro board for ongoing sprint rituals.
- **Vani by Zoho & High-Res PNG:** Port live layouts into Zoho's Vani visual workspace, or grab a crisp 2x PNG snapshot for Notion, GitHub PRs, or Confluence.

Choosing the Right Handoff Destination

Destination	How to Trigger	What Carries Over & Ideal Audience
Claude Doc (`.docx` / PDF)	Chat prompt: *"Convert board to PRD"*	Swimlanes become sections; sticky notes expand into prose specs & owner tables for sign-off.
Slide Deck (`.pptx` / PDF)	Chat prompt: *"Turn board into 7 slides"*	Themes become executive headline slides with milestone visuals for VP/stakeholder readouts.
Lucidspark / Lucidchart	`Share → Export → Send to: Lucid`	Native editable vectors, nodes & connectors via Lucid MCP for architecture governance.
Miro / Vani by Zoho	`Share → Export → Send to: Miro / Vani`	Editable sticky clusters and frames ready for 100-person workshops and ongoing team hubs.

5 Real-World Copy-Paste Whiteboard Recipes

Paste any recipe below into a Claude chat or active **Claude Project** (or pair it with a voice brain dump or lassoed region) to produce clean, executive-ready spatial canvases immediately.

Recipe & Scenario	Copy-Paste Prompt (Zero Placeholders Left Ambiguous)	Canvas Output & Next Move
1. Voice Monologue → Launch Swimlanes *Kickoff Planning*	`Create a Claude Whiteboard from my voice dump above. Organize into 4 horizontal swimlanes (Product, Engineering, Security/Legal, GTM) spanning Weeks 1-6. Keep every card ≤12 words with @Owner and target-date pills, wire solid arrows for hard blockers, and place a coral 'Unresolved Questions' cluster at top-right.`	Structured 6-week launch roadmap + explicit open questions ready for live team review.
2. Live Sprint Retro Sticky Clusterer *Team Facilitation*	`[Lasso Staging Zone] Group these raw teammate stickies into 5 root-cause themes. Keep every original sticky stacked intact with author initials under its new theme header, add a mention-count badge per theme, draw dashed red lines between conflicting viewpoints, and draft 4 owner-assigned action cards on the right.`	De-duplicated retro themes, surfaced cross-team tensions, and Friday-dated action items.
3. Customer Journey Friction Map *UX & Discovery*	`Using the 8 customer interview transcripts in this Claude Project, build a Claude Whiteboard mapping our end-to-end onboarding journey across 5 stages (Signup → Workspace Setup → First Import → Invite Team → Upgrade). Attach amber stickies with verbatim quote snippets under drop-off points and mint quick-win cards below.`	Evidence-backed UX friction map grounded in real user quotes; exportable to Miro/Figma reviews.
4. Architecture & Blast-Radius Board *Systems & SRE*	`Build a system architecture Claude Whiteboard from our Project's Auth & Billing specs showing Client, API Gateway, Auth Service, Stripe Worker, and Postgres. Next, [Lasso Stripe Worker] and attach rose failure-mode cards for webhook storms, DB pool exhaustion, and idempotency retries plus circuit-breaker mitigations.`	Clean service topology + failure blast-radius overlay; push via `Send to: Lucid` for Lucidchart ops.
5. Board-to-PRD + Exec Deck Handoff *Zero-Retype Shipping*	`Now that our team has finalized this Claude Whiteboard, generate two deliverables in sequence: (1) a comprehensive PRD Claude Doc preserving every swimlane milestone, owner, dependency, and risk mitigation, and (2) a concise 6-slide executive readout (.pptx) highlighting timeline, top 3 risks, and budget trade-offs.`	Ready-to-circulate `.docx` engineering spec + `.pptx` leadership deck with zero manual copy-paste.

Power Combo: Paste Slack Threads Directly onto the Board

Got a chaotic 45-reply incident or product debate in Slack? Copy the entire raw thread, paste it into Claude with Recipe #1 or #4, and watch 45 linear messages snap into clean causal branches and decision options in under 15 seconds.

Iterative Refinement Beats Mega-Prompts

Generate the big-picture topology first (5–15 seconds), review spatial balance with your team on screen, and then use **Region-Box Selection** to enrich one swimlane or cluster at a time.

Team Permissions, Governance & Version Checkpoints

Early-stage strategy boards often contain unannounced product roadmaps, M&A evaluations, or security architecture gaps. Understanding workspace visibility boundaries, external export policies, and version history keeps sensitive canvases safe.

1 Admin Console & Connector Governance

- **Central Feature Switch:** Owners and Primary Owners control access under `Organization settings → Artifacts` (Team: **On** by default; Enterprise: **Off** by default until reviewed).
- **Zero Model Training Guarantee:** On Claude Team and Enterprise plans, whiteboard contents, voice dictations, and sticky notes are **never** used to train Anthropic models.
- **Scoped External Connectors:** Security admins independently allowlist `Lucid MCP`, `Miro`, or `Vani` so regulated orgs can enjoy internal AI whiteboarding while blocking third-party SaaS exports if required.

2 Sharing Scopes & Project Boundaries

- **Private Drafts First:** Every Whiteboard starts private to your chat until you explicitly share it or create it inside a shared Team Project.
- **Workspace-Bounded Links:** On Team and Enterprise accounts, shared Whiteboard links require authenticated organization SSO sign-in—preventing accidental public link leaks.
- **Project Context Isolation:** Invited collaborators see the Whiteboard canvas, not private chats outside that shared Project.

Permission & Export Matrix Across Tiers

Capability / Guardrail	Pro, Max & Ultra	Team Plan	Enterprise Plan
Default Activation (Beta)	Active immediately	**On by default** (+ Claude Meetings)	**Off by default** (Owner enables in Artifacts)
Live Multiplayer Editing	Personal / shared artifact view	Real-time workspace co-editing	SSO-gated org & Project multiplayer
Lucid / Miro / Vani Export	User OAuth account link	Workspace connector policy	Granular MCP & admin allowlist + audit
Artifact Version History	Full per-chat `v1..vN` timeline	Shared version checkpoints	Org retention + compliance governance

Golden Safety Habit: Save Named Checkpoints Before Bold AI Re-Layouts

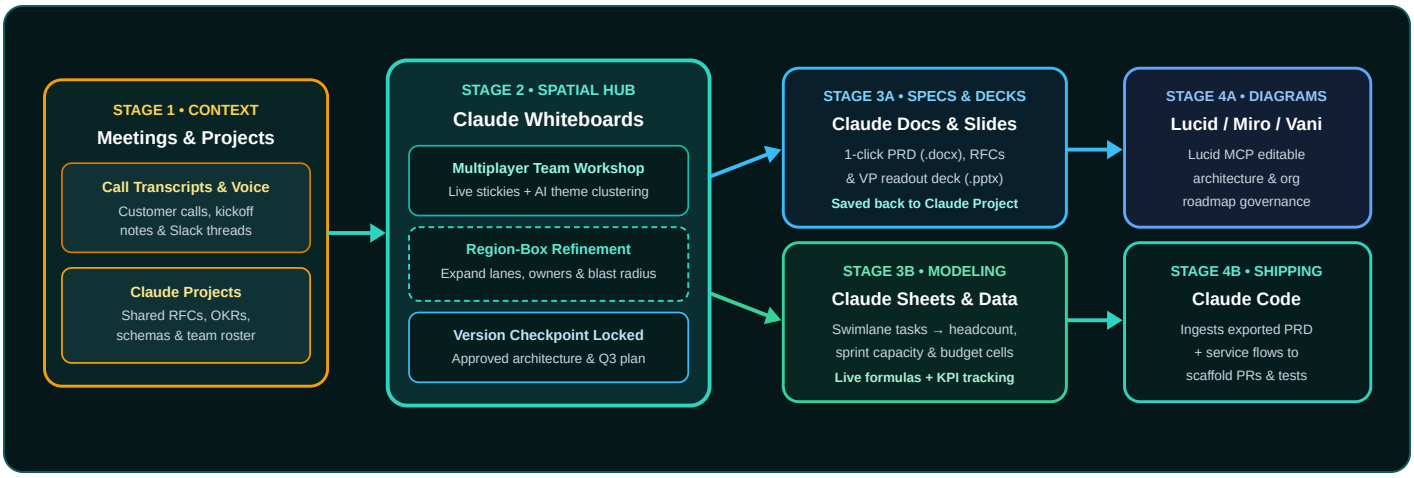
Before asking Claude to test a radically different layout (for example, *"reorganize our entire 4-team swimlane board into a customer-persona funnel"*), note your current Artifact version badge (such as `v6`) in the top-right header or ask Claude: *"Create a clean v7 experiment reorganizing this by persona so we can compare against v6."* Switching between `v6` and `v7` in the Artifact version selector is instantaneous and non-destructive.

Compliance Watchout Before Clicking "Send to: Lucid / Miro"

Once a board leaves Claude via an external export connector, retention and guest-access rules are governed by your destination Lucid, Miro, or Vani workspace. Verify destination folder permissions whenever exporting pre-announcement strategy or customer PII.

Cross-Tool Synergy: From Call Transcript to Shipped Code

Claude Whiteboards shines brightest as the central spatial router connecting Anthropic's broader workspace studio—bridging raw discovery in **Claude Projects** straight into **Claude Sheets**, **Claude Docs**, **Lucid/Miro**, and **Claude Code**.



Walking the 4-Stage Pipeline in One Afternoon

1 Transcript + Project → Spatial Board

Drop a discovery call transcript into your shared **Claude Project**. Launch a Whiteboard and let teammates add missing edge-case stickies live while Claude maps swimlanes grounded in your existing API schemas.

2 Board → Claude Sheets Resource Model

In the same thread, ask: *"Turn the approved swimlanes on this Whiteboard into a **Claude Sheet** estimating engineering weeks, cloud spend, and sprint capacity with live formulas."*

3 Board → Claude Doc + Lucid MCP

Generate the formal engineering RFC as a **Claude Doc** (pinned back into the Project) and click `Send to: Lucid` so enterprise architects can link live cloud inventory metadata in Lucidchart.

4 Approved Spec → Claude Code Execution

Hand the exported Markdown RFC and architectural milestone checklist straight to **Claude Code** in your repository—moving from messy spoken brainstorm to tested pull requests with zero lost context.

Pin Exported PRDs Back Into Your Claude Project

After converting a Whiteboard into a Claude Doc spec, click **Add to Project Knowledge**. Every future Whiteboard or Claude Sheet opened in that Project automatically inherits the newly agreed milestones and owners.

Troubleshooting Clinic & Pre-Flight Checklist

Use this quick diagnostic clinic whenever a layout shifts unexpectedly, an enterprise button is hidden, or a large team workshop feels crowded—followed by our 6-point facilitator checklist.

Symptom / Issue	Root Cause	10-Second Fix
1. Claude reorganized the entire board when I only wanted one corner edited	Prompt sent globally in chat without selecting a canvas region.	Revert one step via the Artifact version picker, drag a **Region-Box Selection** around only the target corner, and re-run with a preservation guardrail.
2. Whiteboard option is missing on my Enterprise or Team account	Enterprise defaults Whiteboards to `Off` (or Team admin toggled it off).	Ask an Organization Owner/Primary Owner to open `Organization settings → Artifacts` (and check `Capabilities`) to enable **Claude Whiteboards**.
3. 100+ sticky dump looks cramped and hard to scan on screen	Single-pass clustering tried to render prose paragraphs + 12+ micro-groups.	Run a **2-pass cluster**: Pass 1 groups into max 5 macro-themes; Pass 2 lassos one theme at a time and caps sticky titles at `≤12 words`.
4. Voice dictation cuts off mid-thought during a long monologue	Browser tab lost focus or OS mic silence timer closed the stream after a pause.	Dictate in focused 2–3 minute chapters: generate the base lanes first, then click the mic again to layer risks and owners incrementally.
5. `Send to: Lucid / Miro` is grayed out or blocked on export	External MCP / integration connector restricted by org policy or unlinked OAuth.	Authenticate your Lucid/Miro account in `Settings → Integrations`, or ask IT to allowlist the official **Lucid MCP** / Miro connector; use PNG + Doc export meanwhile.
6. Claude invents generic team names instead of our real services/owners	Whiteboard was launched in an isolated blank chat outside your Claude Project.	Start the Whiteboard inside your **Claude Project** (or attach your roster/RFC file in chat) and ask Claude to re-tag `@Owners` from Project knowledge.
7. A bold layout experiment overwrote a board arrangement we loved	New AI layout generated a fresh Artifact revision over the active view.	Click the **Artifact Version Selector (`v1..vN`)** at the top of the Whiteboard pane to step back to the exact prior version in one click.

6-Point Facilitator Pre-Flight Checklist

- ☑ **1. Launch Inside a Claude Project:** Load specs, OKRs, and team rosters first so every generated sticky reflects real system context.
- ☑ **2. Verify Multiplayer & Org Access:** Confirm invited attendees can open the shared workspace link 5 minutes before kickoff.
- ☑ **3. Create an Open "Staging Zone":** Give live participants one clear box to dump raw stickies before AI clustering runs.
- ☑ **4. Enforce the 12-Word Sticky Cap:** Keep spatial nodes scannable at 100% zoom; save long prose for the Claude Doc handoff.
- ☑ **5. Lasso Before Local Edits:** Always use **Region-Box Selection** once any portion of your board is approved by the group.
- ☑ **6. Ship Dual Outputs Before Wrapping:** Export a **Claude Doc / Slide Deck** + push via `Send to: Lucid / Miro` in the final 3 minutes.

Final Takeaway: Let Humans Bring the Mess, Let Claude Bring the Geometry

The magic of Claude Whiteboards is psychological: when nobody has to worry about aligning boxes during the first 30 minutes, teams speak more honestly, surface sharper risks, and leave every meeting with shipping documents already written.