**Strategy Document: [Project Name]**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| Angus Man | BI Analyst | 05/06/2024 |
| Emma Santiago | Hiring Manager | 05/06/2024 |
| Keith Portone | Project Manager | 05/06/2024 |
| Minna Rah | Lead BI Analyst | 05/06/2024 |

**Proposer:** Emma Santiago, Keith Portone, Minna Rah

**Status:** Draft > Under review > Implemented | Not implemented (Highlight current status)

**Primary dataset:** Delivered

**Secondary dataset:** No secondary dataset available

## User Profiles: Used internally by team members (Ian Ortega, Sylvie Essa) to deliver insights to executives.

# **Dashboard Functionality**

|  |  |
| --- | --- |
| **Dashboard Feature** | **Your Request** |
| Reference dashboard  (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.) | None specified, no existing dashboard to model after. |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | Limited to stakeholders: Emma Santiago, Keith Portone, Minna Rah, Ian Ortega, Sylvie Essa. |
| Scope  (What data should be included or excluded in this dashboard?) | Include data on number of calls, repeat calls, call type, market city, and date. |
| Date filters and granularity  (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a “granularity” drop-down? If so, what granularity should be selected by default?) | Daily, weekly, monthly, quarterly, yearly timescales. Default to last 30 days. |

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# **Metrics and Charts**

Create a table for each chart that you’d like to include in the dashboard. If you’d like to break the dashboard under different headers, feel free to list those here as well.

### Chart 1

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeat Calls Trends |
| Chart type  (What type of chart needs to be created?) | Line chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Date (weekly, monthly, quarterly) |
| Metric(s)  (What metrics are relevant to this chart?) | Number of repeat calls |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeat Calls by Market and Problem Type |
| Chart type  (What type of chart needs to be created?) | Stacked bar chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Market city, Problem type |
| Metric(s)  (What metrics are relevant to this chart?) | Number of repeat calls |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeat Calls by First Contact Date |
| Chart type  (What type of chart needs to be created?) | Line chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Date |
| Metric(s)  (What metrics are relevant to this chart?) | Number of repeat calls |

### Dashboard mockup

A close-up of a graph

Description automatically generated

# **Next steps:**

1. Review these documents to ensure all relevant details are included.
2. Identify any missing information or follow-up questions for stakeholders.
3. Develop a timeline and detailed plan for executing each phase of the project.