Avinash Bisram

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Link: <https://app.mavenanalytics.io/guided-projects/13ce0362-3a49-473d-9421-9e15ee8adfa7>

Git path: cd OneDrive/Desktop/Coding/Github Repos/Miscellaneous

Project Brief:

A screenshot of a sales dashboard

Description automatically generated

Direct Stakeholder: Sales Managers

Goal: Track their team’s quarterly performance (is there reason to allow for monthly or yearly data?)

Meta Goal: My final output will definitely be a dashboard that answers the main assignment but I also want to use this as an opportunity to hone my business intuition more. So, I’m going to moving from a high-level, data/tool agnostic approach, and then seeing how much of what I truly want to show can be done within our current constraints (data constraints, specific visualization tools etc.). This will also be good practice to help inform additional data needs or the need to use different tools than a company currently has.

End Goal: A dashboard that informs sales managers of their teams quarterly performance. I want to make to make deciphering that dashboard as easy as possible as well (adding data storytelling to guide them to important insights).

General Steps:

Measurement Planning: (Personal practice but not necessarily needed)

Data Agnostic

1. Think like a business owner
   1. What are the high-level goals of the business as a whole?
   2. How do the sales teams support those business goals?
   3. What are the most important goals for the sales teams?
   4. What questions should we try to answer for the managers of sales teams?
   5. What actions can you imagine leadership taking based on the data we present?
2. Know your audience
   1. Who are the primary stakeholders and what are they most interested in? What are their goals?
   2. What information would they need to do their job well?
   3. (Hierarchy) (Above) What are the regional sales managers and director of sales most interested in? (Below) What are the individual sales agents interested in?
   4. What information do individual sales agents need to make themselves more effective?
3. Define the KPIs
   1. Map the overall business goals and information needs to IMPACTFUL KPIs and show how they are calculated. Also think about any supporting metrics.
4. Identify Data Sources
   1. In this case we already have our data in the form of a few tables.

Conceptual Dashboard Design:

Tool Agnostic

1. Define the purpose
2. Choose the right metrics
3. Present the data effectively (choosing the right visuals for each metric?)

Data Needs:

Data Agnostic

1. In what form do you need the final data to be able to build the dashboard (thinking tables and fields)

Data Collection:

Tool Required

1. Collect the raw data

Data Validation and EDA/Profiling:

Tool Required

1. Import the raw data
2. General data validation
3. Understand the data (data profiling

Data Transformation and Export:

Tool Required

1. Transform the data (merges, new columns, etc.) to be usable by your dashboard software
2. Export it (or connect it to software)

Building the dashboard:

Tool Required:

1. Construct the individual charts outlined in “Present the data effectively” (or as much as you can with the given tool)
2. Eliminate clutter and noise
3. Use layout to focus attention
4. Tell a story

Outline Key Takeaways: (Stakeholders might do this themselves but still good practice to grow as analyst)

1. Based on final dashboard, what are some takeaways/insights you can report to end-users? Remember, don’t just **summarize** the trends of each chart, you want to provide **actionable steps** and **guidance** on what they should do based on these insights.

Meta Timeline:

1. (DONE) Planning out the steps needed to complete the ask
2. Completing each step
   1. Measurement Planning
   2. Conceptual Dashboard Design
   3. Data Needs
   4. Data Collection
   5. Data Validation and Profiling
   6. Data Transformation and Export
   7. Building the Dashboard
   8. Outline key takeaways