**Strategy Document: [Project Name]**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| Chatelos Spyros | BI Analyst | 29/04/2023 |

**Proposer:** Emma Santiago, Hiring Manager

**Status:** Draft

**Primary dataset:** market\_1, market\_2, market\_3

User Profiles

Emma Santiage, Hiring Manager  
Keith Portone, Project Manager

Minna Rah, Lead BI Analyst

Ian Ortega, BI Analyst

Sylvie Essa, BI Analyst

## 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.) | Build a new dashboard to explore the number of repeat callers and their problem types in three different market cities. |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | Provided as read-only to the user |
| Scope  (What data should be included or excluded in this dashboard?) | date, market, problem\_type, contact\_n and contact\_n\_# |
| 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?) | filters:Week, Month, Quarter  Granularity:Any chart with detailed metrics should have the ability to click on that metric to view specific information. |

# **Metrics and Charts**

### Chart 1

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeated calls by first date |
| Chart type  (What type of chart needs to be created?) | Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Day of initial call, subsequent repeat calls |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Market and Problem Type of First Repeat Calls |
| Chart type  (What type of chart needs to be created?) | Bar |
| Dimension(s)  (What dimensions does this chart need to include?) | Call type, market, contact\_n\_1 |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Calls by Market and Type |
| Chart type  (What type of chart needs to be created?) | Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Market, call type, day |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeats by Week, Month, and Quarter |
| Chart type  [What type of chart needs to be created? This could include any chart type, including a line chart (timeseries), bar chart, or table.] | Bar |
| Dimension(s)  [What dimensions does this chart need to include?] | Date, contact |
| Metric(s)  [What metrics are relevant to this chart?] | Date |

Repeats