Reading: Activity Exemplar: Complete the business intelligence documents

Here are completed exemplars along with an explanation of how the exemplars fulfill the expectations for the activity.

Completed Exemplar

To review the exemplars for this course item, click the following links and select *Use Template*.

Links to exemplars:

- Stakeholder requirements document: MarkIt
- Project requirements document: MarkIt
- Strategy document: MarkIt

OR

If you don't have a Google account, you can download the exemplars directly from the following attachments.

Activity Exemplar: Stakeholder requirements document: MarkIt

Activity Exemplar: Project requirements document: MarkIt

Activity Exemplar: Strategy document: MarkIt

Assessment of Exemplar

In this activity, you practiced completing key BI planning documents based on a realistic scenario. The scenario was intentionally missing important information, so part of your task was to identify what you were missing and come up with follow-up questions you could ask the stakeholder. This activity will prepare you to complete these forms in future projects throughout your career.

Project planning docs help you understand the needs and expectations of your stakeholders. This allows you to communicate with them effectively and better understand how to complete the project. You will be able to determine what information will most help you meet the project needs.

Your documents don't have to perfectly match these exemplars. The goal is to properly organize the information into the correct fields and understand how planning documents help you prepare for a BI project. This is an opportunity for you to check your understanding, ensure that you've met the activity's expectations, and explore a possible solution.

In the **Stakeholder Requirements Document exemplar**, you'll notice that areas where you're missing information are highlighted in bold. In your own projects, you might find it helpful to note what you're missing directly on the document. Then, when you ask follow-up questions, you can replace those notes with the correct information.

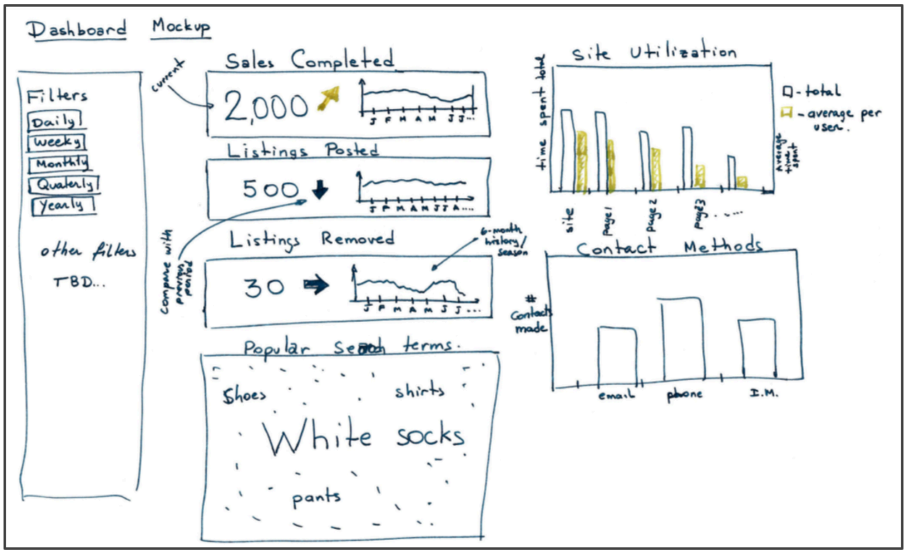
Most of the information in these docs is pulled directly from the notes in the activity's scenario. You might also reword something to summarize or expand on notes from the meeting. For example, the notes include "The goal is to understand how these buyers and sellers use their platform. The insights could then inform new-product design and improve the platform." You might translate this into the business problem section of the planning doc by wording it as "How do buyers and sellers use MarkIt's platform? How can MarkIt improve their platform?" This frames the language in the notes as a question instead of a statement.

In the **Project Requirements Document exemplar**, you need to assign each of the stakeholder's requests as "required," "desired," or "nice to have." A hint for what belongs where can be found in the language the stakeholders use. In the scenario notes, some of the requests might have "must," while others might have "can we?" or "should."

You'll also find that this document has more fields that are missing information. This can provide clues about what you should ask in follow-up meetings.

The **Strategy Document exemplar** is the longest document and has more missing information. But because this is the stage where you can determine what kinds of charts you might make, many of your answers can be left to your best judgment. Unless the stakeholder tells you what kinds of charts they want, you will need to use your BI expertise to decide what works best. In this scenario, the stakeholders didn’t give you any chart type suggestions. This means you can make the decisions yourself or decide to follow up with the stakeholder for more guidance.

The Strategy Document is also where you might include a sketch of a mockup.



This mockup includes filters for timescales, such as daily, weekly, and monthly. It features the current status and historical charts of the following metrics: sales completed, listings posted, listings removed, and popular search terms. It has a bar chart comparing total site utilization with the average site utilization per user. It also has a bar chart with the distribution of contact methods used to submit support requests.

This sketch represents a first draft of what your dashboard might look like when you get to the visualization stage of a BI project. You'll learn more about mockups, including how to use a mockup to plan a dashboard, later in this program.

Key takeaways

Filling out planning documents is a helpful way to organize details from your conversations with stakeholders and prepare for a business intelligence project. You’ll use these skills later in this course when you begin your own BI project.