https://www.commonbusiness.info/2014/09/whats-the-difference-between-a-goal-objective-strategy-and-tactic/

Goal > Objective > Strategy > Tactic

Strategy > Model > Process > System

**What?**

How we did last year in consumer loans across the bank.

**Why?**

This request comes from CEO Robert Smith by way of project manager Mary Jones. He wants to understand how we did as a bank last year in consumer loans. He is interested in the following:

-Last year compared to the previous two years

-Several different measures: count, commitment, balance, revenue

-Production in terms of geographic regions, branches, and products

-New vs. existing customers

**How?**

Data

- Querying data that is stored on DFNB2 database, specifically on stg_p1 table.

Tools

- SQL Server as the backend database

- SQL Server Management Studio for backend and middle tier (business logic) development

- GitHub for code repository

Queries

- Aggregate Functions

- Group BY clauses

- Granularity with "WHERE" clauses


Research questions (taken from Zionsknowledge Wiki SMPS article):

Q: Existing systems: Do we already have one?

A: Yes. Database is already created; queries just need to be made.

Q: Feasibility: Any known data or functionality gaps?

A: See below...

Data Gaps - as a general overview the data is founded in database at a very high grain level. If there was a need to go deep in grain there would be missing data such names of products, consumers, etc.

Q: Sustainability: Ongoing resource requirements? Cycle?

A: See below...

Hardware - Server for the Datawarehouse

People - Database Administrator or Business Intelligence engineer.

Cycle - a daily refresh of the backend data.

Q: Stability: What might threaten the things existence once it is built?

A: Server outages and hardware issues are the most likely threat.

Q: Vendor options: Are any being considered?

A: no vendors needed at this point.

Q: Horizontal expansion requirements: Any new FTE, hardware, or software resources?

A: No new FTE, existing software and hardware are sufficient.

Q: Vertical dependencies: Anyone else involved? Especially someone "higher up"?

A: No. Data is founded in database, perhaps will need approval from manager for the BI engineer build the reports from the data queried.

Q: Company growth rate scenarios

A: It will impact business decisions regarding promotions, and perhaps new branches to be open.