Tableau Project

Sales insights

Data Discovery:

Aim’s Grid:

Definition:

AIMS grid is a very useful tool to improve Project Management skills for Project managers, Team Leaders etc. It helps to clarify a task and keep the process simple. AIMS grid presents a project in a very concise manner.

Aim’s Grid has four components.

The first component is the purpose. What is the purpose of this project, why are we doing this and what do we want to achieve?

Purpose:

To unlock sales insights that are not visible before for sales team for decision support and automate them to reduced manual time spent in data gathering.

They clearly define the purpose in the purpose section of the Aim’s grid.

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The second component is the stakeholders, who all is involved in this project, in our case this is.

Stakeholders:

* Sales Director
* Marketing Team
* Customer Service Team
* Data and Analytics Team
* IT

Sometimes people have a data analysis team in-house and sometimes they outsource the work to some service-based companies. In our case we are going to assume the team is in-house.

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The third component is the end result, what do you want to achieve, as a result of this project. In our case it will be a functioning, working tableau dashboard, which can generate insights for you.

End Result:

An automated dashboard providing quick and latest sales insights in order to support data driven decision making.

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The fourth component is a success criterion. We will be able to know that our requirements meet in the end.

Success Criteria:

* Dashboard(s) uncovering sales order insights with latest data available.
* Sales team able to take better decisions and prove 10 percent cost savings of total spend.
* Sales Analysts stop data gathering manually in order to save 20% of their business time and reinvest it value added activity.

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Once these components are defined these teams will start brainstorming on the next step.

First team that is involved is IT team, Falcons.

IT team is responsible for building and maintaining the software that is used by AtliQ Hardware.

The company uses a software we call it Sales Management System, and in which all the company data (like their transactions, sales, invoices, customer info etc) is stored. And that software is designed by the in-house AtliQ Hardware IT team called Falcons. And behind the software there is mysql database. So, this database has all the actual information of their data.

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Second team that is Data Analysts team, Data Master.

Data Masters can directly hook on to Tableau with the MySQL database and they can do their analysis and build the dashboard.

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Third team is Data Engineers team, Data Minors.

In the big corporations they have one more component called Data Warehouse. They build this data warehouse where they take the mysql data and they perform a process called ETL, Extract Transform Load like a same data that you transform in a different format. That you store in a data warehouse, a Data Warehouse could be Terra Data, Amazon, red shift or it could be mysql, and the people who are responsible for this are called Data Engineers.

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Now this is our team, these people are expert in maintaining the data infrastructure.

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Why do we need to do this extra work?

The mysql database that we have in the sales management system that we have is called OLTP- Online-Transaction-Processing-System. It’s a critical system where the day-to-day sales are being recorded. (like salesmen are going out and they are recording this business, maybe they are actually printing the invoice and all that.) so that’s a critical system. If the system goes down it’ll effect your business in a negative way.

The Data Analysis process is very sensitive, let’s say if data analysts are running queries on Mysql database directly and if the database gets slower then it’ll effect your business. So, people don’t want that. So what the company do is they create this extra copy of database called data warehouse, where they will transform the data in a way so it can be analyzed easier and the data analysts/data scientists will perform their data analysis on data warehouse data, not the actual mysql database data.

So, the data warehouse is called the OLAP- Online-Analytical-Processing-System so if the data warehouse goes down, it doesn’t actually affect your business. It can affect your data analysis process though.

The Data Analysts will hook up to this data warehouse and then they will either write a visualization dashboard, or python programs, pandas programs, different tools to analyze.

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So, this is the structure for a typical data analysis project.