AdventureWorks User Stories

Persona 1 - CEO

As a CEO, I need to

1. Evaluate overall sales performance, so that I can understand how to improve and meet the goal
    1.1. Estimate if sales target will be met at the end of the quarter and the year, so that I can provide strategic guidance to the company
        1.1.1. Review current quarter to date and year to date progress against sales target, to see how far we are behind or ahead of target
        1.1.2. Review year over year growth of sales, to understand how much we have grown
        1.1.3. Review the sales trend, to see if the performance is dropping or improving
        1.1.4. Review the seasonality of previous years, to see if how sales is expected to trend next
        1.1.5. [Bonus] Review the sales and changes in sales of the top resellers and top selling products in terms of sales $ amount, to understand which customers or products had the most impact on overall sales performance
        1.1.6. [Bonus] Understand the probability of not meeting sales target, meeting sales target and exceeding sales target by more than 15% at the end of the year
    1.2. Evaluate sales performance of the Internet channel and Reseller channel jointly and separately, to see how the two channels are performing and contributing to the overall sales
    1.3. For reseller sales, evaluate the performance of each region, so that I can understand how to help each one of them achieve their goals
        1.3.1. Compare current quarter to date and year to date progress against sales target of all regions, to see which region needs more help
        1.3.2. Evaluate the sales trends of one region of interest, to see how performance trended in the past and how it's likely to trend next
        1.3.3. Review the sales performance of the sales territories under the region, to understand which territory (or territories) is leading or dragging the performance
    1.4. For internet sales, evaluate the performance of each region, so that I can understand how to help the internet channel grow

      1.4.1. Review the size of each region in terms of internet sales, to see which region is leading in this channel

      1.4.2. Review the year over year growth of internet sales of all regions, to see which region is growing or shrinking

      1.4.3. Review the ratio of internet vs reseller sales of all regions and the change of this ratio over time, to understand the mix of the two channels in the same geographic market

  1.5. [Bonus] Identify growth outliers in terms of geographic market and product, to understand what could be potentially emerging or shrinking where

2. Evaluate profit performance, so that I can strategize how to optimize it

  2.1. Understand the overall profitability, to establish a baseline for strategic analysis

      2.1.1. Review the current year to date profit % and $ amount, and the variance from previous years, to see if profitability is improving or declining

      2.1.2. Review the quarterly trend of profitability, to see if it's improving or declining

  2.2. Understand the profitability of the sales channels and regions, to see how each business segment is performing and contributing to the overall profitability

      2.2.1. For each business segment, understand the current year to date profitability, to see which segment is leading or lagging

      2.2.2. For each business segment, review the year over year change and quarterly trend of profitability, to see which segment is improving or declining

  2.3. Analyze different factors that could impact profitability

      2.3.1. Review reseller sales and profit by sales rep, to see which top selling reps could improve on profitability and which more profitable reps should boost their sales

      2.3.2. Review the most and least profitable product lines and products, and understand their impact on overall profitability

      2.3.3. Segment resellers based on sales and profitability, to see identify the most valuable resellers and opportunities to grow

      2.3.4. [Bonus] Review the profit and sales trends of current year and understand the impact of various promotional events

3. Evaluate factors that affect customer satisfaction, so that I can find opportunities to improve

  3.1. Evaluate On-Time Delivery performance, so that I can make sure it doesn't affect customer satisfaction negatively

      3.1.1. Review current quarter to date and year to date On-Time Delivery %, to see if we are meeting the goal or not

      3.1.2. Review rolling 12 month trend of On-Time Delivery %, to see if performance is improving or declining

      3.1.3. Review On-Time Delivery % by region and territory, to see where performance is good or bad and who might need some help

4. Access frequently updated, clean and consistently formatted data, to analyze performance

    4.1. See both reseller and internet sales in the same report

    4.2. See clean data without empty values

Persona 2 - Regional Sales Manager

As a Regional Sales Manager, I need to

1. Evaluate sales performance, so that I can understand how to improve and meet my goal

    1.1. Estimate if my sales target will be met at the end of the quarter and the year, so that I can provide strategic guidance to the sales teams in my region

    1.1.1. Review current quarter to date and year to date progress against sales target, to see how far we are behind or ahead of target

    1.1.2. Review year over year growth of sales, to understand how much my region has grown

    1.1.3. Compare the sales performance of my region to that of other regions, to see if there is any potential factor affecting all regions or only my region

    1.1.4. Review the sales trend of my region, to see if the performance is dropping or improving

    1.1.5. Review the seasonality of previous years in my region, to see if how sales is expected to trend next

    1.1.6. [Bonus] Understand the similarities and differences of each region's seasonality, to help explain why sales progress may or may not align across regions during the year

    1.2. Evaluate the performance of the sales reps, so that I can understand how to help them achieve their goals

    1.2.1. Compare current quarter to date and year to date progress against sales target of all sales reps, to see who deserves a praise and who might need some help

    1.2.2. Review the performance of new sales reps or sales reps assigned to a new territory, to see how they are adapting

    1.2.3. Review the year over year growth of established sales reps (not new or newly assigned to a territory), to see who's growing and who's not

    1.2.4. Review the sales performance history and details of one sales rep, to understand how to help

Persona 3 - Sales Representative

As a sales rep, I need to

1. Plan my sales activities based on my sales performance, to make sure I meet my sales target
    1.1. Review my quarter to date and year to date sales progress against target, to estimate if I will or will not meet target
    1.2. Compare my sales progress to the rest of the region and the company
    1.3. Identify and prioritize customers (Resellers) to engage with within the month or quarter based on historical buying patterns
        1.3.1. Identify most valuable customers and understand their buying pattern including frequency, product and volume
        1.3.2. Identify customers who haven't ordered as much as the same time period prior year
    1.4. Review customer info and sales history to prepare for sales activity
        1.4.1. How much has the customer ordered in current quarter and current year, in both standard and local currency?
        1.4.2. How is the customer sales trending?
        1.4.3. What's the customer's product mix? Has that changed over time?
        1.4.4. Where is the customer located?
        1.4.5. What's the contact info?
    1.5. [Bonus] Review customer locations on a map view to plan my route for a day of field visit, to utilize my time efficiently