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business analyst

Business Requirements Document (BRD)

Customer Support
Ticketing Dashboard

Project Title: Customer Support Ticketing Dashboard

Date:

Prepared By: Geetanjali Dhoke

Executive Summary:

This document outlines the business requirements for developing a Customer Support Ticketing Dashboard. The goal is to create a centralized reporting solution that captures customer service KPIs, visualizes performance trends, and enables operational insights for improved decision-making. The dashboard will pull ticketing data from tools like Zendesk or Freshdesk, and offer real-time insights into ticket volumes, resolution times, backlog, and SLA compliance.

Business Objectives:

- ✓ Track and analyze customer service performance in real-time.
- ✓ Improve SLA adherence and reduce average resolution time.
- ✓ Identify recurring customer issues and support trends.
- ✓ Enable leadership to make informed decisions using data-driven insights.
- ✓ Provide transparency and accountability across support teams.

Scope of Work:

In Scope:

- ✓ Integration with ticketing systems (e.g., Zendesk, Freshdesk).
- ✓ Data extraction, cleaning, and transformation.
- ✓ Dashboard creation using BI tools (e.g., QuickSight, Tableau, Power BI).
- ✓ User access setup and role-based permissions.
- ✓ Basic training for business users on dashboard usage.

Out of Scope:

- ✓ Manual data entry or ticket creation.
- ✓ CRM system enhancements.
- ✓ Third-party tool licensing and procurement.

Functional Requirements:

| Feature | Description |
|-----------------------|---|
| Ticket Volume Trends | View daily/weekly/monthly count of tickets created, resolved, and reopened. |
| SLA Breach Reporting | Identify tickets that have breached SLA response or resolution times. |
| Backlog Tracker | Monitor the count of pending/open tickets across categories. |
| Agent Performance | Report resolution time and ticket closure rate by agent. |
| Customer Satisfaction | Visualize CSAT scores and trends (if available from source). |
| Drill-down Views | Enable users to filter by team, agent, issue type, and priority. |

Non-Functional Requirements:

- ✓ Dashboard should refresh at least once per hour.
- ✓ Access should be role-based and secured via authentication.
- ✓ System should handle high data volumes without performance degradation.
- ✓ Visuals must be clear and optimized for both desktop and mobile views.

Assumptions:

- ✓ Access to the ticketing system and relevant APIs is available.
- ✓ Stakeholders will define SLA policies and performance thresholds.
- ✓ Data will be available in a structured format (JSON, CSV, etc.).
- ✓ BI tool licenses are already available or planned for procurement.

Stakeholders:

| Role | Name | Responsibility |
|------------------|---------------------|--|
| Support Manager | [Support Lead Name] | Define metrics and performance thresholds. |
| Business Analyst | Geetanjali Dhoke | Requirements gathering, documentation, coordination. |
| Data Engineer | [Engineer Name] | Extract, transform, and load ticket data. |
| BI Developer | [Developer Name] | Design and build dashboard visuals. |

Timeline:

| Phase | Duration |
|------------------------|----------|
| Requirements Gathering | 3 days |
| Data Integration Setup | 4 days |
| Dashboard Development | 6 days |
| Testing & Feedback | 3 days |
| Go Live | 1 day |

Risks & Mitigation:

| Risk | Impact | Mitigation |
|-----------------------------|--------|--|
| API Limitations or Downtime | High | Use retry logic and fallback mechanisms. |
| Data Inconsistency | Medium | Include validation rules and exception logging. |
| User Resistance | Medium | Provide training and onboarding sessions. |
| Scope Creep | High | Freeze scope and track change requests formally. |

Approval:

| Name | Role | Signature |
|------------------|------------------|------------------|
| [Client Name] | Support Manager | |
| Geetanjali Dhoke | Business Analyst | |