

Business Requirements (Mini-BRD)

EXCEL End-to-End Reporting Pack (Business Analytics)

Prepared: 02/06/2025

Background and Problem

Reporting is currently managed through multiple, disconnected Excel files across departments. This leads to manual consolidation, inconsistent KPI definitions, and conflicting results across teams. A standardized reporting pack for Sales and Finance is required, supported by decision tools (project prioritization and discount scenario planning) to improve speed, consistency, and governance.

Objectives

- Standardise Sales analytics to track core KPIs, regional performance, and trends.
- Standardise Finance analytics through a consistent P&L reporting structure, including views such as budget vs actuals and burn rate (if applicable).
- Deliver a project priority matrix to rank initiatives using effort vs impact criteria.
- Deliver a discount scenario planning tool to quantify margin impact and route approvals based on predefined thresholds.
- Centralise core Sales and Finance datasets to establish a single source of truth and reduce duplicate file handling.
- Support onboarding and training for business users to adopt the reporting pack and apply consistent KPI definitions.

Business questions (ad-hoc and management)

- Top 10 products by percentage increase in net sales (2020–2021).
- Division report: net sales (2020, 2021) and growth percentage.
- Top 5 and bottom 5 products by quantity sold.
- New products introduced in 2021.
- Top 5 countries by net sales in 2021.

Scope

<i>In scope</i>	<i>Out of scope</i>
<ul style="list-style-type: none">• Sales analytics dashboard (target vs actual and performance tracking).	<ul style="list-style-type: none">• Replacement of all legacy Excel files (only agreed files are sunset).

<ul style="list-style-type: none"> Finance analytics reporting (P&L, views). Project priority matrix (effort vs impact). Discount scenario planning tool (what-if discount model). Data centralisation for Sales and Finance datasets. 	<ul style="list-style-type: none"> Manual operational data entry into source systems. ERP/CRM software development or redevelopment. IT infrastructure provisioning (servers, cloud administration) unless explicitly assigned. Final commercial approval decisions (the tool supports decisions; it does not approve deals).
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Stakeholders (Overview)

Stakeholder	RACI role	Key responsibility
Senior/Lead Analyst	Accountable	Audits the technical solution for accuracy and efficiency.
Data/Business Analyst (project owner)	Responsible	Builds the reports, decision tools, documentation, and handover material
Business Manager	Consulated	Provides business logic and weighting for the priority matrix; validates
Sales Team	Consulated	Provides feedback on usability and discount workflow requirements.

Success Criteria

Category	Metric	Target
Data integrity	Variance between legacy Excel totals and new reporting.	
Efficiency	Manual hours spent on Sales/Finance reporting	Reduced by ~12 hours/week
Tool utility	Discount tool usage for customer deals created on Excel	Used for 100% of deals above 10% discount

Adoption	Business Users onboard	10+ users trained and active
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Assumption and Constraints

- Only Sales and Finance datasets are included in the initial scope; other domains are excluded.
- Some legacy Excel files remain in use by design, the project targets specific files for standardisation.
- Reporting refresh frequency depends on data availability and agreed cut-off times.
- Access restrictions apply (Sales users should not view Finance-only P&L details).