**Business Request:**

Paul (Sales Manager):

Hi Hilda,

I hope you’re doing well. We’re looking to develop Power BI dashboards to help us make more informed decisions across the business. Right now, we’re focusing on key areas like sales performance, customer segmentation, customer loyalty, and employee performance.

For sales, we need to get a clear view of how much we’ve sold in each product category starting from 2022, so we can track performance over time. Our marketing team is interested in understanding customer behavior by region, which will help them improve campaign targeting.

Sales managers also want to identify top-performing customers to strengthen loyalty programs and adjust sales strategies. Additionally, HR and the sales teams need detailed reports on employee performance, as this will impact compensation.

Lastly, the finance team needs insights into which products are most profitable, to support pricing decisions and optimize our product offerings.

Let me know if you need anything else!

// Paul

**Business Demands and User Stories for Power BI Dashboards:**

* Reporter: Paul – Sales Manager
* Value of Change: Visual dashboards for improved sales reporting, follow up on customer engagement and employee performance reviews
* Necessary Systems: Power BI, CRM System

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| **S No.** | **Business Demand** | **User Story** | **Acceptance Criteria** |
|  | Sales performance insights | As a **sales manager**, I want to view a dashboard showing monthly sales by product category, so I can identify the top contributors to revenue. | The dashboard which displays total sales for each product category by month |
|  | Customer segmentation | As a **sales strategist**, I want to group customers by their average order value, so I can prioritize high-value customers | A dashboard which allows one to filter data for each customer |
|  | Customer loyalty and sales volume | As a **sales manager**, I want to compare customer sales by product category, so I can analyze popular products among top customers. | A dashboard with a stacked bar chart showing top customers and their preferred product categories. |
|  | Employee sales performance | As a **human resources manager**, I want to see total sales made by each employee this year, so I can assess performance. | A dashboard with a table showing total sales per employee, with filters for department and role. |
|  | Product profitability analysis | As a **financial analyst**, I want a dashboard showing profit margins by product category and subcategory, so I can identify profitability. | A dashboard with graphs and KPIs comparing total revenue against cost |