1. **Define Objectives:** Determine the specific goals of your dashboard. What key metrics and insights do you want to gain from the transaction data? Common objectives include tracking sales, customer behavior, and inventory management.
2. **Select a Dashboard Tool:** Choose a dashboard creation tool that suits your needs. Popular options include Tableau, Power BI, Google Data Studio, or custom development using programming languages like Python or JavaScript.
3. **Data Integration:** Integrate your CRM application and e-commerce data sources into the dashboard tool. Ensure that you can access and update the transaction data in real-time or at regular intervals.
4. **Design the Dashboard:** Design the layout of your dashboard. You can have sections for various metrics like sales, customer data, product performance, and more. Visualize the data using charts, graphs, and tables.
5. **Key Metrics:** Include key metrics such as total sales, revenue, average order value, customer retention, conversion rates, and more. Use these metrics to provide a quick overview of your e-commerce activities.
6. **Customer Insights:** Include sections for customer insights, such as demographics, buying behavior, and customer lifetime value (CLV). This can help you tailor your marketing and sales strategies.
7. **Product Performance:** Monitor product performance, including the best-selling products, inventory levels, and restocking needs.
8. **Filters and Interactivity:** Add filters and interactivity features to allow users to customize the view of the data. This helps in exploring data from different angles.
9. **Scheduled Reports:** Set up scheduled reports or alerts to notify stakeholders when specific thresholds or milestones are reached.
10. **Testing and Validation:** Thoroughly test the dashboard to ensure data accuracy and usability. Make sure it meets the objectives defined in step 1.
11. **User Training:** Provide training to users who will be accessing and using the dashboard, so they can make the most of the insights it provides.
12. **Regular Updates:** Continuously update the dashboard as new data becomes available, and refine it based on user feedback and changing business needs.
13. **Security:** Ensure that access to the dashboard is secure and that sensitive data is protected.
14. **Documentation:** Document the dashboard's design, data sources, and any custom calculations or logic for future reference