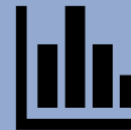


Project Management Plan: Superstore



Sales Performance Dashboard



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Project Name: Superstore Sales Performance Dashboard Project Manager: Lashawn Fofung - Project Manager, Business Analyst, Tableau Developer, Quality Assurance Developer

Date: July 8, 2025

Version: 1.1

1. Project Overview

This project aims to develop an interactive Tableau dashboard to analyze the sales performance of a fictitious Superstore using the provided *Sample Superstore* dataset. The dashboard will provide key insights into sales trends, profitability, and regional/product performance, enabling data-driven decision-making.

Project Goal: To create a comprehensive and user-friendly Tableau dashboard that visualizes key sales performance indicators and facilitates in-depth analysis of Superstore sales data.

2. Business Requirements

- Connect to the Sample Superstore dataset (extract connection).
- Develop a single Tableau dashboard named "Sales Dashboard."
- All worksheets used in the dashboard must be hidden.
- The workbook should be publishable to Tableau Public.
- Dashboard fixed size: Width 1055, Height 850.
- Specific visualizations: Total Sales, Total Profit, Total Volume, Sales Per Customer (scorecards), Pie Chart (Sales by Region), Bar Chart (Top N States by Sales), Bubble Chart (Sales by Sub-Category), Line Chart (Sales Trend by Month-Year).
- Interactive filters: Order Date (range), Segment, Ship Mode, State (all with "Apply" buttons).
- Actionable filters: Pie chart and Bubble chart.
- Parameter for "Top N States."
- Specific formatting for colors, tooltips, legends, borders, and titles as per the detailed requirements.

3. Scope Statement

3A. In-Scope:

- Connecting to the Sample Superstore Excel data file.
- Creating all specified worksheets/views as per business requirements.
- Designing and building the "Sales Dashboard" in Tableau with specified layout, filters, and actions.
- Formatting all elements (text, colors, views, filters, legends) according to the project instructions.
- Hiding individual worksheets after dashboard completion.
- Preparation for publishing to Tableau Public.
- Documentation of the project (Case Study, Insightful Questions, GitHub Repo Description, SQL queries, Tableau Story Summary).

3B. Out-of-Scope:

- Data cleaning or extensive ETL beyond basic Tableau data preparation.
- Integration with live data sources.
- Advanced statistical modeling or predictive analytics (beyond trend analysis).
- Deployment or maintenance of the dashboard in a production environment (beyond Tableau Public).
- Development of a custom database or application (the project focuses on Tableau visualization and associated documentation).

4. Deliverables

1. **Tableau Workbook** (*superstore_sales_performance.twbx*): The complete and functional "Superstore Sales Performance" dashboard.
2. **Case Study Document**: Comprehensive analysis of the project, including executive summary, background, detailed analysis of KPIs, segments, products, trends, and recommendations.
3. **Insightful Questions List**: A set of questions the dashboard helps answer.
4. **GitHub Repository Description**: Markdown content for the project's GitHub README.

5. **SQL Queries:** Example SQL queries relevant to the analysis, assuming a relational database.
6. **Tableau Story Summary:** A brief narrative summary for a potential Tableau Story.
7. **Project Management Plan** (this document).

5. Stakeholders

- **Project Sponsor:** Lashawn Fofung - Provides overall direction and approves final deliverables.
- **Project Manager (PM):** Lashawn Fofung - Responsible for planning, executing, and closing the project.
- **Business Analyst (BA):** Lashawn Fofung - Responsible for Tableau development and data analysis.
- **Tableau Developer (Dev):** Lashawn Fofung - Responsible for Tableau development and data analysis.
- **Quality Assurance (QA) Developer:** Lashawn Fofung - Responsible for Tableau development and data analysis.
- **End-Users:** Business stakeholders who will use the dashboard for sales performance insights.

6. Project Timeline

WBS	Task	Description	Predecessors	Duration	Start Date	End Date	Role	Assigned To	% Allocation
	Project Superstore Sales Performance Dashboard			28d	07/08/25	08/04/25			
1	Planning & Setup	This phase establishes the foundational elements of the project, including defining scope, setting up the environment, and identifying key analytical questions.		5d	07/08/25	07/12/25	BA Dev PM	Lashawn Fofung	100%
1.1	Define project scope & requirement	Formalize project boundaries, deliverables, and success criteria.		2d	07/08/25	07/09/25	BA Dev PM	Lashawn Fofung	100%
1.2	Set up project GitHub repository and README	Create the GitHub repository for the project, initialize it, and draft the initial content for the README.md file, including the project description and basic setup instructions.		1d	07/08/25	07/08/25	BA Dev	Lashawn Fofung	100%
1.3	Set up Project Workspace in Smartsheet	Create and configure the project workspace in Smartsheet, including WBS, Dashboard, and resource(s).	3	2d	07/10/25	07/11/25	BA Dev	Lashawn Fofung	100%
1.4	Obtain/Verify data source	Locate and confirm accessibility and integrity of the source data file.	3	1d	07/10/25	07/10/25	BA Dev PM	Lashawn Fofung	100%

WBS	Task	Description	Predecessors	Duration	Start Date	End Date	Role	Assigned To	% Allocation
1.5	Set up Tableau environment	Install or configure Tableau Desktop/Public, ensuring it's ready for development.	3	1d	07/10/25	07/10/25	BA Dev	Lashawn Fofung	100%
1.6	Develop Insightful Questions	Brainstorm and finalize key business questions to be answered by the dashboard.	7	2d	07/11/25	07/12/25	BA Dev	Lashawn Fofung	100%
2	Data Preparation	This phase focuses on acquiring, connecting to, and performing initial validation of the project's data source.	5	1d	07/13/25	07/13/25	BA Dev PM	Lashawn Fofung	100%
2.1	Connect to data & create extract	Establish data connection in Tableau and create an optimized data extract.	2	1d	07/13/25	07/13/25	BA Dev	Lashawn Fofung	100%
2.2	Basic data validation	Perform initial checks on data quality and consistency.	2	1d	07/13/25	07/13/25	BA Dev	Lashawn Fofung	100%
3	Visualization Development	This phase involves the creation of all individual charts and views required for the dashboard.	9	7d	07/14/25	07/20/25	BA Dev PM	Lashawn Fofung	100%
3.1	Create KPI Scorecards (4 views)	Develop individual sheets for Total Sales, Total Profit, Total Volume, and Sales Per Customer.	11	3d	07/14/25	07/16/25	BA Dev	Lashawn Fofung	100%
3.2	Create Sales by Region (Pie Chart)	Build the visualization showing sales distribution across regions.	13	1d	07/17/25	07/17/25	BA Dev	Lashawn Fofung	100%

WBS	Task	Description	Predecessors	Duration	Start Date	End Date	Role	Assigned To	% Allocation
3.3	Create Top N States (Bar Chart)	Develop the dynamic bar chart for top-performing states by sales.	14	1d	07/18/25	07/18/25	BA Dev	Lashawn Fofung	100%
3.4	Create Sales by Sub-Category (Bubbles Chart)	Construct the bubble chart to visualize sales per sub-category.	15	1d	07/19/25	07/19/25	BA Dev	Lashawn Fofung	100%
3.5	Create Sales Trend (Line Chart)	Develop the line chart to show sales performance over time.	16	1d	07/20/25	07/20/25	BA Dev	Lashawn Fofung	100%
4	Dashboard Assembly	This phase focuses on integrating all developed visualizations into a cohesive and interactive Tableau dashboard, including layout, filtering, and final formatting.	17	5d	07/21/25	07/25/25	BA Dev PM	Lashawn Fofung	100%
4.1	Design Dashboard Layout & Containers	Plan and implement the structural arrangement of visualizations using containers.	16	1d	07/21/25	07/21/25	BA Dev QA	Lashawn Fofung	100%
4.2	Integrate all worksheets into dashboard	Add all developed individual sheets onto the main dashboard canvas.	19	1d	07/22/25	07/22/25	BA Dev QA	Lashawn Fofung	100%
4.3	Implement Filters (Order Date, Segment)	Add and configure interactive filters for dashboard control.	20	1d	07/23/25	07/23/25	BA Dev QA	Lashawn Fofung	100%
4.4	Implement Action Filters (Pie & Bubble Charts)	Set up dashboard actions to enable drill-down functionality from key charts.	21	1d	07/24/25	07/24/25	BA Dev QA	Lashawn Fofung	100%

WBS	Task	Description	Predecessors	Duration	Start Date	End Date	Role	Assigned To	% Allocation
4.5	Fine-tune formatting, legends, titles	Adjust colors, fonts, legends, and titles for consistency and visual appeal.	22	1d	07/25/25	07/25/25	BA Dev QA	Lashawn Fofung	100%
4.6	Hide sheets, final clean-up	Conceal all individual worksheets and perform final workbook optimization.	22	1d	07/25/25	07/25/25	BA Dev QA	Lashawn Fofung	100%
5	Documentation	This phase is dedicated to producing all required project documentation, such as the case study, GitHub repository description, and illustrative SQL queries.	24	6d	07/26/25	07/31/25	BA PM	Lashawn Fofung	100%
5.1	Write Case Study	Draft comprehensive project case study outlining analysis, insights, and recommendations.	24	3d	07/26/25	07/28/25	BA PM	Lashawn Fofung	100%
5.2	Write Tableau Story Summary	Create a brief narrative summary for Tableau Story.	26	1d	07/29/25	07/29/25	BA PM	Lashawn Fofung	100%
5.3	Formulate SQL Queries	Develop illustrative SQL queries for use cases and case studies.	27	2d	07/30/25	07/31/25	BA PM	Lashawn Fofung	100%
6	Review & Closeout	This phase involves internal testing, addressing feedback, and formalizing the project's completion and submission.	28	4d	08/01/25	08/04/25	BA Dev PM QA	Lashawn Fofung	100%

WBS	Task	Description	Predecessors	Duration	Start Date	End Date	Role	Assigned To	% Allocation
6.1	Internal review & testing	Conduct thorough testing of dashboard functionality and data accuracy.	28	1d	08/01/25	08/01/25	BA Dev QA	Lashawn Fofung	100%
6.2	Address feedback & revisions	Incorporate feedback from reviews and make necessary adjustments.	30	1d	08/02/25	08/02/25	BA Dev QA	Lashawn Fofung	100%
6.3	Publish to Tableau Public	Publish the final Tableau workbook to Tableau Public.	31	1d	08/03/25	08/03/25	BA Dev QA	Lashawn Fofung	100%
6.4	Update GitHub Repo Description	Update the README content for project's GitHub repository.	31	1d	08/03/25	08/03/25	BA Dev PM	Lashawn Fofung	100%
6.5	Final project submission	Submit all project deliverables as per requirements.	32, 33	1d	08/04/25	08/04/25	BA Dev PM	Lashawn Fofung	100%

7. Resources

- **Software:** Tableau Desktop/Public, Microsoft Excel, Smartsheet, Text Editor (for documentation), GitHub.
- **Data:** *Sample Superstore.xls* dataset.
- **Personnel:** Lashawn Fofung (as Business Analyst/Tableau Developer/ Quality Assurance Developer /Project Manager).
- **Documentation:** Project requirements document (*Superstore Sales Performance.pdf*).

8. Risk Management

<i>Risk</i>	<i>Likelihood</i>	<i>Impact</i>	<i>Mitigation Strategy</i>
<i>Data inconsistencies/errors</i>	Low	Medium	Basic data validation checks during data preparation.
<i>Tableau technical challenges</i>	Medium	Medium	Referencing Tableau documentation, online communities (e.g., Tableau Community, Stack Overflow).
<i>Misinterpretation of requirements</i>	Low	Medium	Regular review of project instructions and requirements document.
<i>Time overruns</i>	Medium	Medium	Adherence to estimated timeline; prioritize critical tasks; allocate buffer time.
<i>Formatting difficulties</i>	Medium	Low	Careful attention to detail; iterative adjustments; leveraging Tableau features.

9. Communication Plan

- **Internal Communication:** Daily/Bi-weekly self-check-ins on progress.
- **External Communication:** Submission of deliverables as required by the project guidelines.

10. Success Metrics

- All specified dashboard requirements are met.
- The dashboard is interactive and user-friendly.
- All required documentation is completed accurately and clearly.
- Project is completed within the estimated timeline.
- The dashboard provides actionable insights into Superstore sales performance.

11. Project Closure

Upon completion of all deliverables and their successful submission/review, the project will be formally closed. This includes archiving all project files and documentation.