

Project Management Document

Project Title: Yoco: Merchants Sales Insights Dashboard

Date: April 2025

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Project Overview

The Yoco Merchants Sales Insights Dashboard project was a simulated business analysis initiative aimed at improving merchant sales tracking and customer insight through a responsive digital dashboard. The solution was tailored to fit within Yoco's mobile app ecosystem and aligned with small business user needs. The dashboard focused on providing real-time visibility into daily sales trends, payment methods, and customer activity.

Business Problem

Yoco merchants lacked a centralised, real-time, and visually intuitive way to monitor sales performance. They relied on fragmented or delayed data, impacting their ability to make timely business decisions.

Project Objective Design and document requirements for a dashboard that empowers Yoco merchants to:

- Monitor daily and weekly sales trends
- Identify customer behaviour patterns
- Track preferred payment methods
- Improve operational decisions through data insights

Stakeholder Personas

- Lerato (Café Owner, Cape Town):** Needs to track peak sales hours to schedule staff effectively.
- Thabo (Streetwear Retailer, Johannesburg):** Wants to understand which payment methods are most used by his customers.
- Naledi (Hair Salon Owner, Durban):** Seeks insights into repeat vs. new customer behaviour.

Business Analysis Activities

1. Requirements Elicitation & Analysis

- Translated merchant needs into epics and user stories within Jira.
- Applied INVEST criteria to write user stories with clear acceptance criteria.
- Example Story: "As a merchant, I want to see hourly sales breakdown so I can adjust my staffing accordingly."

2. Stakeholder Collaboration

- Simulated cross-functional team (PO, Dev, QA, UX) through detailed issue descriptions.
- Integrated stakeholder feedback loops into sprint cycles to reflect Agile collaboration.

3. Backlog Management & Prioritisation

- Organised issues in Jira based on MoSCoW prioritisation.
- Maintained a traceable backlog reflecting real Agile cadence across three sprints.

4. Process Modelling

- Modelled agile workflows using Jira statuses and transitions.
- Future recommendation: Include formal BPMN or journey maps.

5. UX & Interface Alignment

- Ensured user stories accounted for UI components like filters, charts, and navigation behaviour.
- Aligned features with Yoco's design guidelines.

SDYM Board Screenshots

Figure 1: Jira Backlog View – Epic and Story Structure

Figure 2: Sprint Board – Task Progress across Agile Workflow

Figure 3: User Story Detail – Acceptance Criteria and Description

Figure 4: QA Bug Ticket – Simulated User Feedback Loop

Outcomes & Reflections

- Developed hands-on experience managing a BA project end-to-end in Jira.
- Practiced backlog refinement, requirement scoping, and Agile sprint planning.
- Realised the importance of acceptance criteria in aligning dev effort to business goals.
- Learned to simulate stakeholder dynamics in a solo project.

Lessons Learned

- Use wireframes (e.g., Figma) in early requirement stages to support BA storytelling.
- Formalise feedback collection using tools like surveys or usability metrics.
- Incorporate real data or mock datasets to simulate stakeholder validation.

Improvement Opportunities

- Add formal process flowcharts or journey maps.
- Simulate A/B testing feedback loop.
- Build a working prototype using tools like Power BI or Google Data Studio.

Conclusion

This project demonstrates how a Business Analyst can drive product clarity and delivery within an Agile context, even in simulation. From requirements gathering to backlog management and iterative delivery, it reflects industry-aligned BA practices and a strong foundation for future client-facing work.