

STAKEHOLDER REQUIREMENTS

AVAILABLE INFORMATION/DATA

Data - Sales and Marketing data.

CONTAINS:

- **Customer Details** [Customer ID, Customer Name]
- **Sales Representatives** [Names of Representatives]
- **Regions/Territories** [Name of Regions]
- **Products sold** [Name of products]
- **Lead sources** [Name of leading source of sale]
- **Deal Size** (Revenue) [Revenue generated from that sale in \$]
- **Deal Dates** [Date which that sale was made]

What does the stakeholder need?

-> An interactive dashboard that highlights.

1. SALES PERFORMANCE

- Total Sales Overtime [Month, quarterly, yearly - **Trend**]
- Sales Reps that are performing best.
- Regions that are performing best.
- The average deal (Revenue) Size.
- The top 20% of sales representatives by total sales.
- The average annual sales per sales representative.

2. LEAD SOURCE EFFECTIVENESS

- Lead sources that drive the most revenue.
- Are some sources associated with high-value deals?

3.BONUS

A forecast for future sales based on historical trends. Prediction.

Deliverables

-> A dashboard file containing.

Clear visualizations that meet the above needs.

- At least 3 calculated metrics/measures [Total revenue, average deal size etc.]
- At least 2 examples of using [Slicers, Filters or dropdowns]
- Clean formatting and logical layout.
- Text explanations or labels to help users interpret your work.
- A 5 min video walking the stakeholders through the dashboard with an explanation of the Key insights uncovered and highlight any recommendations Based on the data.