User Requirement Document: Excel Sales Dashboard

Objective

To design and develop a dynamic, visually engaging, and informative Sales Dashboard in Excel that empowers stakeholders to monitor performance, identify trends, and make data-driven decisions across products, regions, and timeframes.

Problems Identified

- Decision-makers lack real-time visibility into key performance indicators (KPIs).
- Manual reporting is time-consuming and error-prone.
- No dashboard exists to track targets vs. actuals, sales performance by region, product, and rep, or to identify underperforming segments.

Target Audience

- **Sales Managers**: To monitor team and individual performance.
- **Head of Sales: To** assess strategic sales performance and ROI.
- **Regional Sales Reps**: To understand their performance and areas of opportunity.
- **Marketing Team**: To identify campaign impact on sales.

Use Cases

User Story 1: View total sales by region and product in order to track targets and where performance lags.

Acceptance Criteria: Includes filters for deal size, quarterly sales; visualizes performance with charts and KPIs.

User Story 2: See monthly performance, top-selling cities, delivery performance and item category sales.

Acceptance Criteria: Personalized view; top 5 selling cites; sales trends for last 12 months, delivery by percentage and what items sells the most.

Success Criteria

- Dashboard is dynamic and linked to the data. Any data update requires a refresh with the refresh button with minimal effort.
- Average load time < 5 seconds.
- Adoption rate > 80% among target users within 2 months.
- 90% of users report the dashboard aids decision-making.

KPIs: Total Sales, Total Profit, Total Quantity

Information Needed

- Total Sales (Monthly/Quarterly/Annually)
- Sales Targets
- Product Categories & SKUs
- Regional Sales Data

Data Needed

- Sales Transactions Dataset
- Sales Targets Dataset
- Product Master Data
- Employee/Rep Directory
- Customer Data

Data Quality Checks

- **Completeness:** No missing values for key fields.
- **Accuracy:** Match financial records.
- **Consistency:** Unique IDs across datasets.
- **Duplicate Handling:** No duplicates; unique transaction IDs.
- **Validation Rules:** Non-negative sales amounts, valid dates, matching product IDs.