Online Retail Store Operations and Marketing Dashboard - Requirements Document

Date: January 2025
Prepared by: Riyana Diljee

---

1. Project Overview:

Objective: Develop an interactive Power BI dashboard to provide key insights into an online retail store's sales and marketing performance. The dashboard will assist the CEO and CMO in strategic decision-making by identifying revenue drivers, highlighting areas of success, and supporting data-driven expansion strategies. This analysis aims to maximize growth opportunities and improve forecasting based on operational and demographic trends.

---

2. Business Questions:

The dashboard should help answer the following key business questions:

Time Series Revenue Analysis (CEO):

- How does revenue change on a monthly basis during the year 2011?
- What seasonal trends are evident, and what factors might be driving these trends?
- How can these insights be used to improve forecasting for the upcoming year?

Top Revenue Countries (CMO):

- Which 10 countries (excluding the United Kingdom) generate the highest revenue?
- How do the quantity of items sold compare alongside the revenue generated in these countries?

Top Customers by Revenue (CMO):

- Who are the top 10 customers based on revenue?
- How can a descending visual ranking of customers (from highest to lowest revenue) help identify key customers to target for retention?

Regional Demand Insights (CEO):

- Which regions (excluding the United Kingdom) exhibit the highest demand for the products?

● How can a visual display of demand across regions support an effective expansion strategy?

---

3. Data Sources

The following data sources will be used to populate the dashboard:

● **Sales Data:**
  ○ **File Name:** *OnlineRetailData.xlsx*
  ○ **Fields:** InvoiceNo, StockCode, Description, Quantity, InvoiceDate, UnitPrice, CustomerID, Country

---

4. Desired Visuals

The dashboard will include the following types of visuals:

● **Drill-Down Line Charts:**
  ○ *Purpose:* Display monthly revenue trends for 2011,with drill-down capabilities for daily and hourly insights, to highlight seasonal patterns.
  ○ *Data:* Date (X-axis) → Monthly, Daily, Hourly vs. Total Revenue (Y-axis).
● **Clustered Column Charts:**
  ○ *Purpose:* Compare the Top 10 revenue-generating countries (excluding the United Kingdom) and analyze both the revenue and quantity sold.
  ○ *Data:* Country (X-axis) vs. Quantity and Revenue (Y-axis).
● **Column Charts:**
  ○ *Purpose:* Rank the Top 10 customers in descending order by revenue to identify high-value customers.
  ○ *Data:* Customers (X-axis) vs. Revenue (Y-axis).
● **Map Charts:**
  ○ *Purpose:* Visualize demand for products across various regions (excluding the United Kingdom) to support expansion strategy.
  ○ *Metrics:* Demand indicators (quantity ordered), represented through bubble size.
● **KPI Cards:**
  ○ *Purpose:* Highlight key metrics at a glance, such as:
    ■ Total Revenue
    ■ Total Customers
    ■ Average Order Value (AOV)