PROJECT REQUIREMENTS DOCUMENT

BI Professional: Luis Rodrigo García Quiñones.

Client/Sponsor: Jamal Harris, Director, Customer Data.

Purpose:

Cyclistic's Customer Growth Team is creating a business plan for next year. The team wants to understand how their customers are using their bikes; their top priority is identifying customer demand at different station locations. The dataset includes millions of rides, so the team wants a dashboard that summarizes key insights. Business plans that are driven by customer insights are more successful than plans driven by just internal staff observations. The executive view must include key data points that are summarized and aggregated in order for the leadership team to get a clear vision of how customers are using Cyclistic.

Key dependencies:

This project will require a dataset of customer data, so the Director of Customer Data will need to approve the request. Approval should also be given by the teams that own specific product data including bike trip duration and bike identification numbers to validate that the data is being interpreted correctly. The primary contacts are Adhira Patel, Megan Pirato, Rick Andersson, and Tessa Blackwell.

Stakeholder requirements:

In order to continuously improve and effectively market products, the dashboard must help Cyclistic decision-makers understand how their customers are using the bikes and the demand at different locations, including factors that might influence that demand at different times.

- A table or map visualization exploring starting and ending station locations, aggregated by location. **R**
- A visualization showing which destination (ending) locations are popular based on the total trip minutes. **R**
- A visualization that focuses on trends from the summer of 2015. **D**
- A visualization showing the percent growth in the number of trips year over year. **R**
- Gather insights about congestion at stations. **N**
- Gather insights about the number of trips across all starting and ending locations. **R**
- Gather insights about peak usage by time of day, season, and the impact of weather. **R**

Success criteria.

Specific: BI insights must clearly identify the specific characteristics of a repeat calls, including how often customers are repeating calls.
Measurable: Calls should be evaluated using measurable metrics, including frequency and volume. For example, do customers call with a specific problem more often than others? Which market city experiences the most call? How many customers are calling more than once?
Action-oriented: These outcomes must quantify the number of repeat callers under different circumstances to provide the Google Fiber team with insights into customer satisfaction.
Relevant: All metrics must support the primary question: How often are customers repeatedly contacting the customer service team?
Time-bound: Analyze data that spans at least one year to understand how repeat callers change over time. Exploring data that spans multiple months will capture peaks and valleys in usage.

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User journeys:

The team's ultimate goal is to communicate with the customers to reduce the call volume and increase customer satisfaction and improve operational optimization. The dashboard you create should demonstrate an understanding of this goal and provide your stakeholders with insights about repeat caller volumes in different markets and the types of problems they represent.

Assumptions:

In order to anonymize and fictionalize the data, the datasets the columns market_1, market_2, and market_3 to indicate three different city service areas the data represents.

The data also lists five problem types:

- Type_1 is account management
- Type_2 is technician troubleshooting
- Type_3 is scheduling
- Type_4 is construction
- Type_5 is internet and wifi
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Additionally, the dataset also records repeat calls over seven day periods. The initial contact date is listed as contacts_n. The other call columns are then contacts_n_number of days since first call. For example, contacts_n_6 indicates six days since first contact.

Compliance and privacy:

The datasets are fictionalized versions of the actual data this team works with. Because of this, the data is already anonymized and approved. However, you will need to make sure that stakeholders have data access to all datasets so they can explore the steps you've taken.

Accessibility:

The dashboards should offer text alternatives including large print and text-to-speech.

Roll-out plan:

The stakeholders have requested a completed BI tool in two weeks.

Contact Information

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