

SEPTEMBER 2024



# Project Proposal

Development of Sales Analysis  
Dashboard

PRESENTED TO:

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# About DataInsights Solutions

## Overview:

DataInsights Solutions is a leading provider of advanced data analytics and business intelligence services. Founded in 2010, we specialize in transforming raw data into actionable insights, empowering organizations to make data-driven decisions that enhance performance and drive growth.

## Our Expertise:

With a decade of experience in the industry, our team of expert data analysts, business consultants, and IT professionals have successfully delivered over 500 projects across various sectors, including retail, finance, healthcare, and manufacturing. Our core expertise lies in data integration, dashboard development, predictive analytics, and custom reporting solutions.

## Our Approach:

At DataInsights Solutions, we adopt a client-centric approach to understand the unique challenges and objectives of each business. We leverage cutting-edge technologies such as Power BI, Tableau, and SQL to design and implement tailored analytics solutions that meet specific business needs. Our methodologies ensure data accuracy, security, and scalability, providing our clients with reliable and comprehensive insights.

## ORGANIZATION AND MANAGEMENT



**Rob**  
Founder



**San**  
Developer



**Kent**  
Business Analyst



**Sally**  
Product Manager

# Mission and Vision



## MISSION

Our mission is to empower sales managers and representatives with actionable insights through comprehensive and intuitive data analytics tools, enabling them to make informed decisions and drive business growth.



## VISION

We envision a data-driven sales environment where managers and representatives can seamlessly access and interpret sales data, leading to optimized strategies, improved customer relationships, and maximized sales performance.

# Proposed Timeline

The proposed timeline for the data analyst project ensures a structured and efficient delivery of the executive sales report for sales managers. This timeline outlines six key phases:

## Phase 1: Requirements Gathering (Week 1-2)

- Collect and analyze business requirements.
- Define user stories and acceptance criteria.

2

## Phase 2: Dashboard Design (Week 3-4)

- Design initial dashboard layouts in Power BI.
- Review and refine designs based on stakeholder feedback.

3

## Phase 3: Data Integration (Week 5-6)

- Integrate sales data into Power BI.
- Ensure data accuracy and reliability.

4

## Phase 4: Development & Testing (Week 7-8)

- Develop Power BI dashboards based on user stories.
- Perform thorough testing to meet acceptance criteria.

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## Phase 5: Deployment & Training (Week 9-10)

- Deploy the final dashboards.
- Conduct training sessions for sales managers and representatives.





# User Stories

## 1. SALES MANAGER: DASHBOARD OVERVIEW OF INTERNET SALES

As a Sales Manager,  
I want to get a dashboard overview of internet sales,  
So that I can follow better which customers and products sell the best.

Acceptance Criteria:

- A Power BI dashboard which updates data once a day.



## 2. SALES REPRESENTATIVE: DETAILED OVERVIEW OF INTERNET SALES PER CUSTOMERS

As a Sales Representative,  
I want a detailed overview of Internet Sales per Customers,  
So that I can follow up with my customers who buy the most and identify opportunities to sell more.

Acceptance Criteria:

- A Power BI dashboard which allows me to filter data for each customer.



## 3. SALES REPRESENTATIVE: DETAILED OVERVIEW OF INTERNET SALES PER PRODUCTS

As a Sales Representative,  
I want a detailed overview of Internet Sales per Products,  
So that I can follow up with my products that sell the most.

Acceptance Criteria:

- A Power BI dashboard which allows me to filter data for each product.



**For inquiries,  
contact us.**



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