Venture Associates INC

Company Overview

Venture Associates INC is a start-up and was incorporated in 2018. The company manufactures 5 Products namely Alpha, Beta, Gamma, Delta, and Theta.

Reporting Requirements:

The company wants to combine its methods with the power of BI Analysis and Cloud technology. Looking at the current market trends and market leaders, the management wants to try out Power BI as a tool. The management of the company has the following reporting and KPI requirements.

a) Data Understanding

- Each Product has a Product Head who handles the performance of that Product.
- Each product has 5 KPIs on which the performance of that product is analyzed. The 5 KPIs are: CPT, LVT, NKT, MGT and IDT.
- Each KPI has a **High Threshold (HT)** Value and **Low Threshold (LT)** Value. If the Actual Value of KPI is less than equal to LT, it is considered as **Poor**. If the Actual Value is between HT and LT, it is considered as **Average** and if the actual value is more than equal to HT, it is considered as **Good**.
- The Management's colour scheme for performance indicators is as follows: Poor→ **Red**, Average→ **Amber**, Good→ **Green**.
- The management has provided us a data for the last 5 months with the actual values of KPIs and their HT, LT values.

b) Report Making

1) The management wants 2 slicers on the top right of the page for Product Head and Product Name. Whenever a Product Head is selected, only details regarding his/her Product should be visible.
2) The management wants to see the trend of KPI values in a tabular form as per the format provided below:

KPIs	Sep-21	Oct-21	Nov-21	Dec-21	Jan-21
CPT	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*
LVT	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*
NKT	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*
MGT	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*
IDT	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*	*KPI Value*

➔ Conditional Formatting needs to be applied to the background of the cells as per comparison with HT and LT. Colour coding is provided above.

3) The management requires a line chart below the table with a slicer for the KPIs. The Line chart must show the trend of the selected KPI for the given period.

4) Management requires 2 constant dashed lines of HT and LT in the Line chart visual and the values must change as per the KPI selected.

5) The line in the line chart must show Green colour when line touches or goes above the HT line, the line must show Amber colour when the value is between HT and LT Line and the colour of the Line must be Red, when the value touches or goes below the LT line.

We expect to receive a 100% positive response from the client if we can fulfil their requirement. Let's give our best here.