

Business Demand Overview & User Stories

Business Demand Overview

Reporter: Sales Director

Value of Change:

Transitioning to dynamic, visual dashboards will provide more actionable insights into sales performance, growth trends, and customer demographics, enabling the company to optimize strategies, improve marketing focus, and enhance decision-making.

Necessary Systems:

- Power BI
- CRM System
- Budget data (2022, 2023, and 2024)
- Historical sales data for comparison

Other Relevant Information:

The budgets for 2022, 2023, and 2024 have been provided, and a detailed analysis of the last three years' sales performance is requested, with a comparison to these budgets.

User Stories

No.	As a (Role)	I want (Request / Demand)	So that I (User Value)	Acceptance Criteria
1	Sales Director	A dashboard overview of total sales for the last 3 years, compared to the 2022-2024 budget	Can track performance and adjust strategies based on budget gaps	A Power BI dashboard comparing sales from 2022-2024 to actual performance, top products, and customers
2	Sales Director	Insights into monthly sales growth by	Can identify top product categories	A Power BI dashboard that calculates

		product category	contributing to growth each month	monthly growth % and allows filtering by product category
3	Sales Director	A breakdown of customer base by demographics	Can better understand customer segments and optimize engagement	A Power BI dashboard showing segmentation by demographics, city, and purchasing trends with slicers
4	Sales Director	A detailed view of top customers and products	Can focus on high-performing accounts and cross-sell opportunities	A Power BI dashboard with filters for customers and products, showing top 10 lists by sales