Activity Overview

In this activity, you will create the project planning documents that you would use to prepare for a business intelligence project. This includes a Stakeholder Requirements Document, a Project Requirements Document, and a Strategy Document. To fill out each section, you will use your meeting notes.

Project planning documents help you confirm project details with your stakeholders and prepare to complete a BI project.

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the following scenario, then complete the step-by-step instructions.

In this scenario, you are working as a BI professional for a fictional consumer-to-consumer sales company, MarkIt. You recently attended a meeting with key stakeholders to gather details about this BI project. Refer to the following notes from the meeting. Use the information they contain to complete the Stakeholder Requirements Document, Project Requirements Document, and Planning Document. If you need additional guidance, refer to the previous reading: Key business intelligence documents.

Note: These notes are intentionally incomplete. Keep track of the information that is missing in the notes that will help you complete the templates.

Meeting Notes:

Stakeholders:

Alice Shi, Vice President of Sales

Matías Sosa, Program Manager

Team members:

Ariana Tirado, Data Warehousing Specialist

Cornelia Vega, Manager, Data Governance

Sam Winters, Data Analyst

Dashboard needs to be accessible, with large print and text-to-speech alternatives

Background info:

MarkIt maintains an online platform that facilitates previously-owned item sales between individual buyers and sellers. The goal is to understand how these buyers and sellers use their platform. The insights could then inform new-product design and improve the platform.

The team wants to review data that tracks the number of listings posted; the number of sales completed; and the number of listings deleted on a daily, quarterly, and yearly timescale. They also want to better understand search query behavior that buyers have when searching for an item. For example, if a buyer searches for more different types of items, are they more or less likely to complete a purchase? Do broader search terms mean a user is less committed to making a purchase?

Project goals:

Understand what customers want, what makes a successful sale, and how to improve experience for buyers and sellers

Understand how the platform is used by both types of users: How much time do users spend on the site? What pages do they spend the most time on? How do buyers conduct searches, and how do sellers create and maintain listings? How do buyers and sellers contact one another?

Discover how we can apply insights related to search query behavior

Understand pain points in the sales process

The ask/metrics:

Include fields for customer ID/username, item category (such as clothing or household goods), and date.

Determine if we can add a chart illustrating how long the listings for completed sales are online before the sale is completed.

For buyers: Include a chart comparing the number of searches made and the number of sales completed.

*Tool must be created in four weeks!

Roll-out:

Week 1: Dataset assigned. Initial design for fields and UserIDs validated to fit the requirements

Week 2: SQL and ETL development

Week 3: Finalize SQL, dashboard design, and first draft review with peers

Week 4: Dashboard development and testing

Questions:

How is the online platform used by buyers and sellers?

How can we apply insights related to data generated by sales and search queries?

Next steps

As you use these notes to complete the key BI documents, take time to consider:

How to organize the various points and steps

How to group similar topics

Whether the information is relevant to the project

Whether the metrics are effective or not

Step-By-Step Instructions

Follow the instructions to complete each step of the activity. Then, answer the questions at the end of the activity before going to the next course item to compare your work to completed exemplars.

Step 1: Access the templates

To use the templates for this course item, click the following links and select “Use Template.”

Links to templates:

Stakeholder requirements document

Project requirements document

Strategy document

OR

If you don’t have a Google account, you can download the templates directly from the following attachments.

Activity Template_ Stakeholder requirements document
DOCX File

Activity Template_ Project requirements document
DOCX File

Activity Template_ Strategy document
DOCX File

Step 2: Fill out the Stakeholder Requirements Document

Use your meeting notes to fill out as much of the stakeholder requirements document template as you can. If you find that there are some fields that you can’t fill out, make note of them for later in the exercise. The Stakeholder Requirements Document enables you to capture stakeholder requests and requirements so you understand their needs before planning the rest of the project details or strategy. It should answer the following questions:

3usiness problem: What is the primary question to be answered or problem to be solved?

3takeholders: Who are the major stakeholders of this project, and what are their job titles?

3takeholder usage details: How will the stakeholders use the BI tool?

Primary requirements: What requirements must be met by this BI tool in order for this project to be successful?

Here are some questions BI professionals ask to successfully complete this document:

What questions must be answered before starting this project?

What does the BI team need to know before starting this project?

What are the questions that must be answered and/or problems that must be solved by this project?

What datasets are considered important to this project?

Who should have access to the dashboard? Will the entire dashboard be visible to all stakeholders?

Typically, the Stakeholder Requirements Document is a one-page document with notes, but it can be longer and more detailed for complex projects.

Step 3: Fill out the Project Requirements Document

Use your meeting notes to fill out as much of the project requirements document template as you can. If you find that there are some fields that you can't fill out, make note of them for later in the exercise.
The Project Requirements Document contains the following details:

Purpose: Briefly describe why this project is happening and explain why the company should invest its resources in it.
Key dependencies: Detail the major elements of this project. Include the team, primary contacts, and expected deliverables. Are any inter-team deliverables required?
Stakeholder requirements: List the established stakeholder requirements, based on the Stakeholder Requirements Document. Prioritize the requirements as: R (required), D (desired), or N (nice to have).
Success criteria: Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria. You can review
SMART criteria in the Google Data Analytics Certificate.

User journeys: Document the current user experience and the ideal future experience.

Assumptions: Explicitly and clearly state any assumptions you are making.

Compliance and privacy: Include any compliance, privacy, or legal dimensions to consider.

Accessibility: List key considerations for creating accessible reports for all users. Who needs to access this feature? How are they viewing and interacting with it?

Roll-out plan: Briefly describe the expected scope, priorities, and timeline. Consider at what points during the rollout will measurements be made to determine whether the feature is performing as expected? Is there a rollback plan and timeline if this feature does not meet its intended goals?

Step 4: Fill out the Strategy Document

Use your meeting notes to fill out as much of the strategy document template as you can. If you find that there are some fields that you can't fill out, make note of them for later in the exercise.
The Strategy Document is a collaborative place to align with stakeholders about project deliverables. You will work together to establish information about dashboard functionality and associated metrics and charts. This is a time to explore what metrics will be required, how metrics are calculated, and any limitations or assumptions that exist about the data. Stakeholders think through these details and help the BI professional make final project decisions. Then, the BI professional provides stakeholders with a dashboard mockup to get useful feedback.
Generally, the BI professional will create the document and request review and sign-off from stakeholders. Then, they can begin working on the project with all of the details they need.

Step 5: Write follow-up questions for your client

3y now, you've filled out each of the templates with information from the interview. But you might have ıoticed that you're missing some information for fields in the template. In a professional setting, you might ıeed to ask a client follow-up questions to properly complete planning documents.
Vrite 3–5 questions about information that is missing from the interview notes. In a professional setting, you ːould ask these questions to your client to help you fully complete your documents.

Pro Tip: Save the template

Finally, be sure to save a blank copy of the templates you used to complete this activity. You can use it for further practice or in your professional projects. These templates will help you work through your thought processes and demonstrate your experience to potential employers.
What to Include in Your Response

Be sure to address the following elements in your completed planning documents:

A Stakeholder Requirements Document, completed as fully as possible with information from your notes

A Project Requirements Document, completed as fully as possible with information from your notes

A Strategy Document, completed as fully as possible with information from your notes

At least three questions about missing information from the interview notes

1. Did you complete this activity? 1 point

- (●) Yes
- ( ) No

2. Which project planning document helps you understand the needs of the people most invested in the project's success before planning the rest of the project details? 1 point

- ( ) Strategy Document
- ( ) Project Requirements Document
- ( ) Stakeholder Requirements Document
- ( ) Follow-up Document

3. The Project Requirements Document should contain which of the following details? Select all that apply. 1 point

- [ ] Metrics
- [ ] Purpose
- [ ] Roll-out plan
- [ ] User journeys

4. What is the purpose of the Strategy Document? Select all that apply. 1 point

- [ ] Determine which metrics will be required
- [ ] Align with stakeholders about project deliverables
- [ ] List the major stakeholders for the project
- [ ] Establish information about dashboard functionality