

# Strategy Document: [Project Name]

## Sign-off matrix:

Name	Team / Role	Date
Venkata Tarun Kumar Mavillapalli	BI Analyst	

**Proposer:** [Name and title]

**Status:** [Draft] > **Under review** > Implemented | Not implemented (Highlight current status)

**Primary dataset:** market\_1, market\_2, market\_3

**Secondary dataset:** Follow-up required

**User Profiles** [Who is the intended audience for this dashboard? How do you expect them to use this dashboard?]

Emma Santiago, Hiring Manager

Keith Portone, Project Manager

Minna Rah, Lead BI Analyst

Ian Ortega, BI Analyst

Sylvie Essa, BI Analyst

Stakeholders may view the trends through charts from the data in repeated calls made weekly, month, quarterly, and yearly. Explore these repeat caller trends in the three different market cities and the various problems that arise in these cities

## Dashboard Functionality

Dashboard Feature	Your Request
Reference dashboard (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.)	Develop a new dashboard that will enable the exploration of the frequency and types of repeats calls across three distinct market cities.
Access	

(How should access to the dashboard be limited? Who needs to have access?)	The listed user profiles will be granted read-only access to the provided data.
Scope (What data should be included or excluded in this dashboard?)	Date, market/city, number of days since first call ("contacts_n").
Date filters and granularity (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a "granularity" drop-down? If so, what granularity should be selected by default?)	The dashboard will include the option to apply data filters for different time intervals such as week, month, or quarter. Additionally, charts that display detailed metrics will have a feature that allows users to click on the metrics for access to specific information.

## Metrics and Charts

Create a table for each chart that you'd like to include in the dashboard. If you'd like to break the dashboard under different headers, feel free to list those here as well.

### Chart 1

Chart Feature	Your Request
Chart title	Weekly Repeats Calls
Chart type (What type of chart needs to be created?)	Line Plot
Dimension(s) (What dimensions does this chart need to include?)	Week Number. Number of subsequent repeat calls.
Metric(s) (What metrics are relevant to this chart?)	Number of weekly repeat calls made on average to spot any trends

### Chart 2

Chart Feature	Your Request
---------------	--------------

Chart title	Repeat calls by Market type
Chart type (What type of chart needs to be created?)	Bar Chart
Dimension(s) (What dimensions does this chart need to include?)	Market, repeat contacts, add all type as filter as well
Metric(s) (What metrics are relevant to this chart?)	Which cities contribute to the most calls and what type of repeat calls are the most popular

### Chart 3

Chart Feature	Your Request
Chart title	Repeat calls by Problem Type
Chart type (What type of chart needs to be created?)	Pie chart
Dimension(s) (What dimensions does this chart need to include?)	Problem Type
Metric(s) (What metrics are relevant to this chart?)	Percentage of problem type number given the number of repeated calls in total

### Dashboard mockup

[Include mockup sketch here.]

