📘 Project Documentation Template

# 1. Project Overview

A brief high-level summary of the project.

Example: The "Customer Retention Improvement" project aims to reduce churn by analyzing customer behavior and building proactive retention strategies.

# 2. Background / Current Scenario

Describe the business context, pain points, or opportunities.

Example: Customer churn has increased by 15% in the last two quarters. Exit surveys indicate dissatisfaction with response times and lack of personalization. This project seeks to uncover the root causes and improve retention.

# 3. Objective

What is the goal? Use SMART format when possible.

Example: Reduce churn by 10% in the next quarter by creating segmented retention strategies based on customer behavior analysis.

# 4. Scope

In Scope:

- Analysis of 12-month churn data  
- Customer segmentation and profiling  
- Retention strategy proposals  
- Dashboard with churn monitoring

Out of Scope:

- CRM infrastructure changes  
- Offline customer behavior (in-store)

# 5. Stakeholders

|  |  |  |
| --- | --- | --- |
| Name | Role | Responsibilities |
| Jane Doe | Project Sponsor | Approvals, budget |
| John Smith | Business Analyst | Analysis, documentation, stakeholder comms |
| Data Team | Data Engineers | Data extraction, ETL support |

# 6. Timeline / Milestones

|  |  |  |
| --- | --- | --- |
| Phase | Dates | Deliverables |
| Discovery & Scoping | June 1–10 | Requirements doc |
| Data Analysis | June 11–20 | Insights report |
| Dashboard Development | June 21–28 | Power BI dashboards |
| Final Presentation | July 1 | Exec deck with recommendations |

# 7. Success Metrics (KPIs)

- Monthly churn rate ↓ to <5%  
- Dashboard adoption ≥ 80% by sales team  
- NPS improvement from 62 → 70

# 8. Deliverables

- Churn analysis report (PDF)  
- Customer segments (Excel or CSV)  
- Power BI dashboard  
- Final presentation (Google Slides or PPT)

# 9. Risks & Mitigation

|  |  |
| --- | --- |
| Risk | Mitigation Strategy |
| Incomplete or dirty data | Early data quality check, alert data team |
| Low stakeholder engagement | Weekly check-ins and preview sessions |

# 10. Dashboards / Visuals

• Power BI link: [Insert link]  
• Screenshot sample: (Insert screenshots here)

# 11. Appendices

- Data dictionary  
- SQL queries used  
- Full customer feedback summary