

Business Requirements Document (BRD) - SaaS Customer Analytics Dashboard

1) Document Control

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Description - Initial Draft

2) Project Overview

Project Name - SaaS Customer Analytics Dashboard

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Objectives :

The purpose of this project is to provide SaaS Business stakeholders with a comprehensive, interactive dashboard to monitor sales performance, customer Behavior, and retention trends. This will support data-driven decision-making, improve customer retention, and optimise sales strategies.

3) Scope

In Scope:

- Integration of customer and sales data (10k + rows) into a Power BI dashboard
- **Dashboard Pages:**
 1. **Executive Summary**- KPIs such as total sales, customer retention rate, and Churn Rate.
 2. **Geographic Insights** - sales performance by region and city
 3. **Sales Rep Insights** - Individual and team-level performance metrics
 4. **Data Filters** - Slicers for period, region, product category, and sales rep

- DAX-based calculations for revenue growth %, churn, and YoY comparisons
- Tooltips and chart labels for better readability

Out of Scope

- Real-time data streaming
- Integration with CRM tools
- Predictive analytics and AI forecasting

4) Functional Requirements

FR1: Ability to filter dashboard data by date range, region, product category, and sales representative

FR2: KPI cards to display total sales, New Customers Retention%, and churn%

FR3: Interactive maps to visualize geographic performance

FR4: Drill through functionality and summary pages to detailed reports

FR5: Export functionality for charts and tables to PDF /Excel

5) Non-functional Requirements

- **Performance:** Dashboard should load in 5 seconds for datasets < 50,000 rows.
- **Usability:** clean, minimal design with intuitive navigation.
- **Security:** Access is Restricted to authorized users via role-based permissions.
- **Maintainability:** The data model and queries should be modular for easy updates.

6) Assumptions

- Data sources will be available in CSV format, refreshed monthly.
- Users have Power BI access and the necessary permissions.
- KPIs are based on current business definitions provided by stakeholders.

7) Constraints

- Dataset limited to historical data from jan 2023 onwards.
- No external APIs used in phase 1.
- Color palette aligns with the company branding.

8) User Stories

- 1) As a **Sales manager**, I want to view sales performance by region so I can identify high and low performing areas.
- 2) As a **Marketing Analyst**, I want to track churn trends so I can design targeted retention campaigns.
- 3) As a **CEO**, I want an executive summary with KPIs so that I can access quick company health.

9) Acceptance Criteria

- Dashboard reflect accurate and updated data from the source file
- Filters and slicers work across all relevant visuals
- KPIs match calculations and verified in excel
- Navigation between pages is seamless and intuitive

10. Appendices

Sample KPIs:

- **Total Sales (₹)** = SUM(Sales Amount)
- **Customer Retention (%)** = (Repeat Customers / Total Customers) × 100
- **Churn (%)** = (Lost Customers / Total Customers at start) × 100