**Strategy Document: MarkIt**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| Amira Salama | BI Analyst | 05/24/23 |

**Proposer:**

* Emma Santiago, Hiring Manager
* Keith Portone, Project Manager
* Minna Rah, Lead BI Analyst

**Status:** Draft > Under review > Implemented | Not implemented

**Primary dataset:** **Awaiting delivery.**

**User Profiles**: Used internally by the team members (Ian Ortega, BI Analyst & Sylvie Essa, BI Analyst) to deliver insights to executives.

# **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.) | N/A |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | No information listed, ask follow-up question |
| Scope  (What data should be included or excluded in this dashboard?) | Include:   * A chart or table measuring repeat calls by their first contact date * A chart or table exploring repeat calls by market and problem type * Charts showcasing repeat calls by week, month, and quarter. |
| 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?) | Should include weekly, monthly and quarterly timescales |

# **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.

### Will need clarification, ask follow up questions

### Chart 1

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | **TBD** |
| Chart type  (What type of chart needs to be created?) | Bar Chart or a Table by Customer Id/ Name and Number of repeated calls |
| Dimension(s)  (What dimensions does this chart need to include?) | Customer Id/ Name |
| Metric(s)  (What metrics are relevant to this chart?) | Number of total calls  Number of repeated calls |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | **TBD** |
| Chart type  (What type of chart needs to be created?) | Bar chart |
| Dimension(s)  (What dimensions does this chart need to include?) | market and problem type |
| Metric(s)  (What metrics are relevant to this chart?) | Count/Number of Repeated Calls |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | **TBD** |
| Chart type  (What type of chart needs to be created?) | **Line Chart/Trend** |
| Dimension(s)  (What dimensions does this chart need to include?) | Date according to the Granularity |
| Metric(s)  (What metrics are relevant to this chart?) | Count for Repeated calls |

### Chart Mockup: