

Business Requirements Document: Malaysia Retail Sales Dashboard

- **Project Title:** National Retail Sales & Profitability Dashboard
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- **Date:** 23 July 2025
- **Version:** 3.0
- **Project Goal:** To develop a comprehensive four-page Power BI dashboard that provides actionable insights into sales performance, profitability drivers, pricing strategy, and customer behaviours across all Malaysian regions. The dashboard will serve as a central source of truth for strategic decision-making.
- **Target Audience:** Executive Leadership (CEO, CFO), Regional Managers, Category Managers, and Marketing & Strategy Teams.

Page 1: Retail Sales Performance (Executive Overview)

1.1. Business Objective

To provide senior leadership with a high-level, at-a-glance summary of the overall business health and key performance indicators across Malaysia. This page must quickly answer the question, "How are we performing overall?"

1.2. Key Business Questions to Answer

1. What are our core performance metrics (Total Sales, Profit Margin, Quantity Sold)?
2. What is our unit-level profitability?
3. How are sales and profit trending monthly? Can we identify seasonal peaks?
4. Which geographical regions and product categories are our primary revenue drivers?
5. How do our core customer segments' sales contribute and trend quarterly?
6. How does our discount strategy affect sales volume?

1.3. Required KPIs & Insights

- **Total Sales (MYR):** Sum of all sales revenue.
- **Profit Margin (%):** $(\text{Total Profit} / \text{Total Sales}) * 100$.
- **Total Quantity Sold:** Sum of all units sold.
- **Profit per Unit (MYR):** $\text{Total Profit} / \text{Total Quantity Sold}$.
- **Top Product by Profit:** The name of the product with the highest total profit.
- **Top Region by Sales:** The name of the region with the highest total sales.

1.4. Required Interactivity & Filtering

- **Consolidated Slicer Panel:** A pop-out panel containing slicers for:
 - Quarter
 - Region
 - Category
 - Segment

1.5. Required Visualizations

1. **KPI Scorecards:** Six distinct cards prominently displaying the KPIs from section 1.3.
2. **Monthly Performance Trend:** A combination chart showing Total Sales and Total Profit by month.
3. **Sales and Profit Analysis by Product Category:** A bar chart showing sales and profit for each category.
4. **Geographical Sales Distribution:** A map of Malaysia displaying Total Sales by State.
5. **Customer Segment Sales Analysis by Quarter:** A stacked bar chart showing sales by segment, tracked quarterly.
6. **Sales Volume by Discount Percentage:** A bar chart showing total sales for different discount brackets.

Page 2: Product Performance (Deep-Dive)

2.1. Business Objective

To empower Category Managers and analysts to conduct detailed investigations into the drivers of product profitability and performance. This page must answer the critical question, "Which products are driving our success?"

2.2. Key Business Questions to Answer

1. Which specific products (sub-categories) are our most and least profitable?
2. What is the relationship between a product's sales volume and its profitability?
3. How do our top products trend over time?
4. What are our unit economics (sales per unit vs. profit per unit) for each category?
5. Which specific products are our top 10 most profitable?

2.3. Required Interactivity & Filtering

- **Drill-through Capability:** Users must be able to right-click a product or sub-category on this page and drill through to a hidden details page containing a granular data matrix.
- **Slicers:** Inherits slicers from the main panel, with additional slicers for Sub-Category.

2.4. Required Visualizations

1. **Profitability Analysis by Sub-Category:** A bar chart ranking sub-categories by total profit, with conditional formatting to highlight negative-profit items in red.
2. **Performance Quadrant Matrix:** A scatter plot with Total Sales on the X-axis and Profit Margin % on the Y-axis, plotting each product or sub-category to identify "Stars," "Workhorses," "Niche Winners," and "Underperformers."
3. **Sales Trend for Top 3 Products:** A line chart showing the monthly sales trend for the three products with the highest total sales.
4. **Unit Economics by Category:** A bar chart comparing Sales per Unit and Profit per Unit for each product category.
5. **Top 10 Products by Profit:** A table listing the top 10 products, ranked by their total profit contribution.

Page 3: Discount Analysis & Price Strategy

3.1. Business Objective

To analyze the effectiveness and financial impact of our discounting strategy. This page must provide insights to optimize promotions, pricing, and overall profit margin.

3.2. Key Business Questions to Answer

1. Which product categories generate the most sales from discounted items?
2. What is the relationship between discount levels, sales volume, and profitability?
3. How has our average discount rate changed over time?
4. What is the direct correlation between the discount rate and profit margin?
5. What percentage of our sales are considered "high discount"?

3.3. Required Visualizations

1. **Sales from Discounted Items by Category:** A bar chart showing sales from discounted items.
2. **Sales and Profitability by Discount Bands:** An area chart showing sales and profit across discount brackets.
3. **Average Discount Percentage Trend:** A line chart showing the average discount % by month.
4. **Discount Rate vs. Profit Margin:** A scatter plot visualizing the correlation between discount rate and profit margin.
5. **High Discount Sales Gauge:** A gauge visual showing the percentage of sales from high-discount transactions.

Page 4: Customer & Profitability Insights

4.1. Business Objective

To provide a deep understanding of customer value and profitability, moving beyond transactions to focus on the overall worth and behavior of different customer segments.

4.2. Key Business Questions to Answer

1. What is the average profit we generate per customer?
2. What proportion of our transactions are profitable?
3. How does profitability trend over time for our key customer segments?
4. Which specific customers are our most valuable in terms of both sales and profit?
5. Which customer segment is the most profitable overall?

4.3. Required Visualizations

1. **KPI Cards:** "Avg Profit per Customer" and "Distinct Customers".
2. **Transaction Profitability Breakdown:** A donut chart showing the count of profitable vs. unprofitable transactions.
3. **Customer Value Matrix:** A scatter plot showing Total Sales vs. Total Profit for each customer.
4. **Monthly Profit Trend by Segment:** A line chart tracking total profit by month for each customer segment.
5. **Total Profit by Segment:** A bar chart ranking customer segments by their total profit.