Development Plan
Transformation into an Insights Team

A transformation of the existing team into a team of Insights mainly consists of two mayor areas of action.

The first step is the optimization of the existing reporting process in terms of content, design and functionality. The goal is to enhance the quality of the reports and ensure all valuable information is communicated to the business stakeholders easily and effortlessly. This requires both technical work and close communication with the business. The second part of the transformation includes actions that could bring more intelligence in the existing process and lead the reporting to the next level. It requires a lot of communication and brainstorming time with business and the team, to identify cases of interest and express ideas that would support this plan.

Considering the given information about Business Intelligence team, I shall suggest the below development plan.

Development Areas	Resource	Action Plan	Target dates
Reporting process optimization (~80% of team's time)	Alex	Schedule meetings with business stakeholders to identify first areas of improvement. Suggest a list with top priorities assignments that the team should focus on (in cooperation with the Head of BI)	1st-3rd month
		Goal to have some examples of assignment transformation that is operational & functional and offer value to the company	4th-8th month
		Designing of projects timelines, deadlines & deliverables - work with Chris& Demi to transfer requirements for implementation	Throughout the 12month period of transformation
	Belinda	Join meetings with business, brainstorming	Throughout the 12month period of transformation
		Transfer requirements to Demi&Chris and work closely for the implementation	Throughout the 12month period of transformation
	Chris	Implementation, work closely with Alex & Belinda	Throughout the 12month period of transformation
		Increase exposure to business I order to increase business understanding, could contribute more to the team	After the 3rd month
	Demi	Implementation, Data Visualization. Work closely with Belinda & Alex	Throughout the 12month period of transformation
		Trainings in technical tools	ASAP
Reporting to the next level (~20% of team's time)	Alex	Work with Chris on PoC for new ideas - meetings with analytics teams	After the 3rd month
		Goal to have some examples of assignment transformation that is operational & functional and offer value to the company	9th-12th
		Designing of projects timelines, deadlines & deliverables	Throughout the 12month period of transformation
	Belinda	Join meetings with business, brainstorming	from the 8th month in parallel with reporting optimization
		Transfer requirements to Demi&Chris and work closely for the implementation	Throughout the 12month period of transformation
	Chris	Implementation, work closely with Alex & Belinda	Throughout the 12month period of transformation
		Meetings with analytics teams to discuss the implementation of analytics solution that would be consumed by the insights team	After the 4th month
	Demi	Implementation, work closely with Alex & Belinda	Throughout the 12month period of transformation
		Join meetings with analytics teams	After the 4th month

Development Plan for Part 1

The solution in Part 1 is currently based on data for January and statistical analysis made from them.

As next step, the segmentation could be enriched using k-means clustering. It is an algorithm which identifies relationships among the customers and assigns them to a respective cluster. The idea is that customers in the same group should have similar characteristics, but also have a different profile from customers of the other groups.

Using the elbow method, we can also identify the optimum number of segments for the existing population based on the data we have. We would also need historical data of this customers, as well as an analysis and discussion with business stakeholders on what kind of data could have an impact on the segmentation and maybe what kind of KPIs we should create. An example of input features in the k-means algorithm would be the amount of revenue spent by every customer to the different cuisine parent.

Taking into consideration the above requirements, I would suggest the below development plan.

Development Areas	Resource	Action Plan
Customer Segmentation	Alex	Data Presentation
		Design the way the solution can be automated, industrialized
		Set project goals, timelines
	Belinda	Meeting with business to understand the purpose of the segmentation and what data could be vital
		Validation of k-means clustering results with Chris
	Chris	Communication with Data Engineers team about Data needed. Work on data acquisition
		K means clustering, implementation
	Demi	Data visualization. Work on dashboard design
		Training to enhance technical knowledge on Python
		Help on the industrialization of the solution