

Scope of Work (SOW) – Business Analyst Project

Project Title

Client Delivery Performance & Profitability Analysis Dashboard

Project Objective

The objective of this project is to analyze organizational project performance data to identify profitability gaps, delivery inefficiencies, client satisfaction risks, and operational improvement opportunities. The analysis will support leadership decision-making through data-driven insights and executive dashboards.

Business Context

Consulting leadership has observed fluctuations in project margins, inconsistent delivery timelines, and varying client satisfaction scores across service lines. A structured analytical assessment is required to identify root causes and recommend actionable improvements.

Scope of Analysis

The Business Analyst will perform the following analysis:

- Revenue and profitability analysis across clients, regions, and service lines
- Delay and delivery performance evaluation
- Client satisfaction trend assessment
- Workforce efficiency and productivity analysis
- Identification of high-risk and low-performing segments
- Correlation analysis between delays and satisfaction
- Executive KPI dashboard development

Key Metrics to be Developed

- Profit and Profit Margin %
- Average Margin by Service Line
- Revenue per Client
- % Projects Delayed
- Average Delay Days
- Revenue per Hour by Employee Level
- Client Value Score
- Cost Efficiency Ratio

Deliverables

- Cleaned and validated dataset
- Business logic documentation
- Interactive Power BI dashboards
- Executive summary presentation
- Insights report with recommendations
- Data model and DAX measures

Dashboard Requirements

- Executive Overview Dashboard
- Delivery Performance Dashboard
- Client Insights Dashboard
- Operational Efficiency Dashboard

Assumptions

All analysis is based on the provided dataset and assumes data accuracy, completeness, and consistency. Any anomalies identified during validation will be documented.

Out of Scope

- Live system integration
- Real-time automation deployment
- External data enrichment
- Predictive ML deployment to production

Success Criteria

- Clear identification of underperforming business segments
- Actionable recommendations backed by data
- Executive-ready dashboard usability
- Accurate KPI calculations
- Professional documentation standards

Project Timeline

The project duration is five working days, including data preparation, analysis, dashboard development, insight generation, and final presentation.

Prepared By

Business Analyst

Approval

Project Manager / Engagement Lead