Project Requirements Document
(Sales Performance & Customer Insights Dashboards)

1. Introduction

This user story outlines the requirements for building two interactive dashboards in Tableau to support stakeholders, including sales managers, marketing teams, and executives, in analysing sales performance and customer behaviour.
The dashboards will provide actionable insights into key performance indicators (KPIs), sales and customer trends, product-level comparisons, and customer contribution analysis.

2. Sales Dashboard Requirements

2.1 Dashboard Purpose

The purpose of sales dashboard is to present an overview of the sales metrics and trends in order to analyse year-over-year sales performance and understand sales trends.

2.2 Key Requirements

KPI Overview

- Display total Sales, Profit, and Quantity for the current year (CY) and previous year (PY).

Sales Trends

- Show monthly trends for Sales, Profit, and Quantity for CY and PY.
- Highlight months with the highest and lowest sales.

Product Subcategory Comparison

- Compare sales and profit across product subcategories for CY vs PY.
- Provide side-by-side comparison of sales and profit for better performance analysis.

Weekly Trends for Sales & Profit

- Present weekly sales and profit trends for the current year.
- Display average weekly values.
- Highlight weeks above and below average to draw attention to performance fluctuations.

3. Customer Dashboard Requirements

3.1 Dashboard Purpose

The customer dashboard aims to provide an overview of customer data, trends and behaviours. It will help marketing teams and management to understand customer segments and improve customer satisfaction.

3.2 Key Requirements

KPI Overview

- Display total Number of Customers, Sales per Customer, and Number of Orders for CY and PY.

Customer Trends

- Show monthly KPIs for CY vs PY.
- Highlight months with highest and lowest customer-related sales.

Customer Distribution by Number of Orders

- Visualize how customers are distributed based on the number of orders placed.
- Provide insights into loyalty and engagement patterns.

Cumulative Sales Contribution (Pareto Analysis)

- Display cumulative percentage contribution of customers to overall sales.
- Highlight the top percentage of customers driving majority of sales.

Top 10 Customers by Profit

- Show top 10 customers ranked by profit contribution.
- Include additional details: rank, number of orders, current sales, current profit, and last order date.

4. Design & Interactivity Requirements

4.1 Dashboard Dynamics

- Enable users to select historical years for analysis.
- Provide easy navigation between Sales and Customer Dashboards.
- Make the charts and graphs interactive, enabling users to filter data using the charts.

4.2 Data Filters

- Allow users to filter data by product information like category and subcategory and by location information like region, state and city.

5. Expected Outcomes

- A Sales Dashboard that enables trend identification, KPI tracking, and category-level analysis.
- A Customer Dashboard that highlights customer behaviour, contribution, and top performers.
- Improved decision-making through interactive visualizations and customizable filters.