**Stakeholder Requirements Document: [Project Name]**

## **BI Professional:** BAILAL Ayoub

## **Client/Sponsor:** Steven - Sales Manager

## **Business problem:** (What is the primary question to be answered or problem to be solved?)

The team’s ultimate goal is to enhance internet sales reporting by transitioning from static reports to dynamic visual dashboards. The focus is on understanding the sales performance, including the quantity of products sold, clients involved, and trends over time.

**Stakeholders:** (Who are the major stakeholders of this project, and what are their job titles?)

* Steven, Sales Manager

## **Stakeholder usage details:** (How will the stakeholders use the BI tool?)

They will use the BI tool to gain insights into internet sales performance. The tool should provide an interactive dashboard that allows users to dynamically analyze sales data. They should be able to filter data based on different parameters, such as products and clients, to tailor the analysis to their specific focus areas.

**Primary requirements:** (What requirements must be met by this BI tool in order for this project to be successful?)

The following requirements must be met by the BI tool for the project to be successful:

* Visual Dashboard: Create a dynamic and visually engaging dashboard highlighting internet sales performance metrics.
* Dynamic Filtering: Implement filters for products and clients to enable personalized analysis for each salesperson.
* Budget Comparison: Integrate the Last budget data for performance comparison, allowing sales teams to assess performance against budgeted values.
* Historical Analysis: Enable analysis of sales data over the past two years to identify trends and patterns.

Project Requirements Document: [Project Name]

## **BI Analyst:** BAILAL Ayoub

## **Client/Sponsor:** Steven - Sales Manager

## **Purpose:** (Briefly describe why the project is happening and why the company should invest resources in it.)

The project aims to enhance internet sales reporting by transitioning from static reports to dynamic visual dashboards. This initiative is critical to provide the sales team with real-time insights into internet sales performance, enabling data-driven decision-making, and improving overall sales effectiveness.

## **Key dependencies:** (Detail the major elements of this project. Include the team, primary contacts, and expected deliverables.)

Need to make sure that stakeholders have data access to all datasets so they can explore the steps token. The primary contact is Steven.

## **Stakeholder requirements:** (List the established stakeholder requirements, based on the Stakeholder Requirements Document. Prioritize the requirements as: R - required, D - desired, or N - nice to have.)

* Visual Dashboard (R): Create a dynamic and visually engaging dashboard highlighting internet sales performance metrics.
* Dynamic Filtering (R): Implement filters for products and clients to enable personalized analysis for each salesperson.
* Budget Comparison (R): Integrate the 2021 budget data for performance comparison.
* Historical Analysis (R): Enable analysis of sales data over the past two years to identify trends and patterns, showing how sales have evolved over time.
* Product Sales Overview (R): Include a chart or table measuring total product sales over time.
* Client Performance Metrics (R): Provide insights into client-specific sales performance metrics.
* Individual Salesperson Analytics (D): Explore options for individual salespersons to filter and view their performance data.
* Real-time Dashboard Updates (N): Investigate the feasibility of real-time updates for the dashboard.

## **Success criteria:** (Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria.)

* **Specific:**
  + **Criterion:** The visual dashboard should effectively communicate internet sales performance metrics.
  + **Measurement:** Achieved when all key performance indicators (KPIs) are clearly presented, including total sales, product-specific sales, and client-specific metrics.
* **Measurable:**
  + **Criterion:** Dynamic filters must function smoothly for personalized analysis.
  + **Measurement:** Success is achieved when users can seamlessly filter data by products and clients, and the system accurately responds to these queries without delays.
* **Action-Oriented:**
  + **Criterion:** Budget comparison tools must provide actionable insights.
  + **Measurement:** Success is evident when sales teams can identify areas where actual performance deviates significantly from the budget, prompting actionable strategies for improvement.
* **Relevant:**
  + **Criterion:** Historical analysis tools should reveal meaningful trends.
  + **Measurement:** Success is established when stakeholders can extract valuable insights from historical sales data, informing relevant decisions for future sales strategies.
* **Time-Bound:**
  + **Criterion:** The initial version of the dashboard should be ready for stakeholder feedback within three months.
  + **Measurement:** Success is achieved by meeting the deadline for the initial dashboard deployment, facilitating timely feedback and subsequent refinements.

## **User journeys:** (Document the current user experience and the ideal future experience.)

* **Current Experience:** Sales team relies on static reports, making it challenging to gain real-time insights and analyze historical trends effectively.
* **Future Experience:** Sales team accesses dynamic dashboards with interactive filters, providing instant insights into internet sales performance and trends.

## **Assumptions:** (Explicitly and clearly state any assumptions you are making.)

## **Compliance and privacy:** (Include compliance, privacy, or legal dimensions to consider.)

Ensure compliance with data protection regulations.

Securely handle sensitive sales data, limiting access to authorized personnel.

## **Accessibility:** (List key considerations for creating accessible reports for all users.)

The dashboards should offer text alternatives including large print and text-to-speech.

**Roll-out plan:** (Detail the expected scope, priorities and timeline.)

The stakeholders have requested a completed dashboard before the deadline.