

SALES MANAGEMENT PROJECT

BUSINESS REQUEST | BUSINESS DEMAND OVERVIEW | USER STORIES

Bea Jane Lazona

BUSINESS REQUEST

Steven - Sales Manager:

Hi Ali!

I hope you are doing well. We need to improve our **internet sales reports** and want to move from static reports to **visual dashboards**.

Essentially, we want to focus it on how much we have **sold of what products**, to which **clients** and **how it has been over time**.

Seeing as each **sales person** works on different products and customers it would be beneficial to be able to **filter** them also.

We measure our numbers against **budget** so I added that in a **spreadsheet** so we can compare our values against performance.

The budget is for 2021 and we usually look **2 years back** in time when we do analysis of sales.

Let me know if you need anything else!

// Steven

BUSINESS DEMAND OVERVIEW

Reporter:

Steven (Sales Manager)

Value of Change:

Visual dashboards and improved Sales reporting or follow-up for sales force

Necessary Systems:

Power BI, CRM System

Other Relevant Info:

Budgets have been delivered in Excel for 2021

USER STORIES

No #	As a (role)	I want (request / demand)	So that I (user value)	Acceptance Criteria
1	Sales Manager	To get a dashboard overview of internet sales	Can follow better which customers and products sells the best	A Power BI dashboard which updates data once a day
2	Sales Representative	A detailed overview of Internet Sales per Customers	Can follow up my customers that buys the most and who can sell are to	A Power Bi dashboard which allows me to filter data for each customer
3	Sales Representative	A detailed overview of Internet Sales per Products	Can follow up my Products that sells the most	A Power BI dashboard which allows me to filter data for each Product
4	Sales Manager	A dashboard overview of Internet Sales	Can follow sales over time against budget	A Power BI dashboard with graphs and KPIs comparing against budget