Activity Overview

In this activity, you will create the project planning documents that you would use to prepare for a business intelligence project. This includes a Stakeholder Requirements Document, a Project Requirements Document, and a Strategy Document. To fill out each section, you will use your meeting notes.

Project planning documents help you confirm project details with your stakeholders and prepare to complete a BI project.

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the following scenario, then complete the step-by-step instructions.

In this scenario, you are working as a BI professional for a fictional consumer-to-consumer sales company, MarkIt. You recently attended a meeting with key stakeholders to gather details about this BI project. Refer to the following notes from the meeting. Use the information they contain to complete the Stakeholder Requirements Document, Project Requirements Document, and Planning Document. If you need additional guidance, refer to the previous reading: Key business intelligence documents.

Note: *These notes are intentionally incomplete. Keep track of the information that is missing in the notes that will help you complete the templates.*

Meeting Notes:

Stakeholders:

Alice Shi, Vice President of Sales

Matías Sosa, Program Manager

Team members:

Ariana Tirado, Data Warehousing Specialist

Cornelia Vega, Manager, Data Governance

Sam Winters, Data Analyst

- Dashboard needs to be accessible, with large print and text-to-speech alternatives

Background info:

MarkIt maintains an online platform that facilitates previously-owned item sales between individual buyers and sellers. The goal is to understand how these buyers and sellers use their platform. The insights could then inform new-product design and improve the platform.

The team wants to review data that tracks the number of listings posted; the number of sales completed; and the number of listings deleted on a daily, quarterly, and yearly timescale. They also want to better understand search query behavior that buyers have when searching for an item. For example, if a buyer searches for more different types of items, are they more or less likely to complete a purchase? Do broader search terms mean a user is less committed to making a purchase?

Project goals:

- Understand what customers want, what makes a successful sale, and how to improve experience for buyers and sellers
- Understand how the platform is used by both types of users: How much time do users spend on the site? What pages do they spend the most time on? How do buyers conduct searches, and how do sellers create and maintain listings? How do buyers and sellers contact one another?
- Discover how we can apply insights related to search query behavior
- Understand pain points in the sales process

The ask/metrics:

- Include fields for customer ID/username, item category (such as clothing or household goods), and date.
- Determine if we can add a chart illustrating how long the listings for completed sales are online before the sale is completed.
- For buyers: Include a chart comparing the number of searches made and the number of sales completed.

*Tool must be created in <u>four weeks!</u>

Roll-out:

Week 1: Dataset assigned. Initial design for fields and UserIDs validated to fit the requirements

Week 2: SQL and ETL development

Week 3: Finalize SQL, dashboard design, and first draft review with peers

Week 4: Dashboard development and testing

Questions:

How is the online platform used by buyers and sellers?

How can we apply insights related to data generated by sales and search queries?

Next steps

As you use these notes to complete the key BI documents, take time to consider:

- How to organize the various points and steps
- How to group similar topics
- Whether the information is relevant to the project
- Whether the metrics are effective or not

Step-By-Step Instructions

Follow the instructions to complete each step of the activity. Then, answer the questions at the end of the activity before going to the next course item to compare your work to completed exemplars.

Step 1: Access the templates

To use the templates for this course item, click the following links and select "Use Template."

Links to templates:

- Stakeholder requirements document
- Project requirements document
- Strategy document

OR

If you don't have a Google account, you can download the templates directly from the following attachments.

Activity Template_ Stakeholder requirements document
DOCX File

Activity Template_ Project requirements document
DOCX File

Activity Template_ Strategy document
DOCX File

Step 2: Fill out the Stakeholder Requirements Document

Use your meeting notes to fill out as much of the stakeholder requirements document template as you can. If you find that there are some fields that you can't fill out, make note of them for later in the exercise.

The Stakeholder Requirements Document enables you to capture stakeholder requests and requirements so you understand their needs before planning the rest of the project details or strategy. It should answer the following questions:

- **Business problem**: What is the primary question to be answered or problem to be solved?
- **Stakeholders**: Who are the major stakeholders of this project, and what are their job titles?
- **Stakeholder usage details**: How will the stakeholders use the BI tool?
- **Primary requirements**: What requirements must be met by this BI tool in order for this project to be successful?

Here are some questions BI professionals ask to successfully complete this document:

- What questions must be answered before starting this project?
- What does the BI team need to know before starting this project?
- What are the questions that must be answered and/or problems that must be solved by this project?
- What datasets are considered important to this project?
- Who should have access to the dashboard? Will the entire dashboard be visible to all stakeholders?

Typically, the Stakeholder Requirements Document is a one-page document with notes, but it can be longer and more detailed for complex projects.

Step 3: Fill out the Project Requirements Document

Use your meeting notes to fill out as much of the project requirements document template as you can. If you find that there are some fields that you can't fill out, make note of them for later in the exercise.

The Project Requirements Document contains the following details:

- **Purpose**: Briefly describe why this project is happening and explain why the company should invest its resources in it.
- **Key dependencies**: Detail the major elements of this project. Include the team, primary contacts, and expected deliverables. Are any inter-team deliverables required?
- **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).

- Success criteria: Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria. You can review [SMART criteria in the Google Data Analytics Certificate.]
- **User journeys**: Document the current user experience and the ideal future experience.
- **Assumptions**: Explicitly and clearly state any assumptions you are making.
- **Compliance and privacy**: Include any compliance, privacy, or legal dimensions to consider.
- **Accessibility**: List key considerations for creating accessible reports for all users. Who needs to access this feature? How are they viewing and interacting with it?

Roll-out plan: Briefly describe the expected scope, priorities, and timeline. Consider at what points during the rollout will measurements be made to determine whether the feature is performing as expected? Is there a rollback plan and timeline if this feature does not meet its intended goals?

Step 4: Fill out the Strategy Document

Use your meeting notes to fill out as much of the strategy document template as you can. If you find that there are some fields that you can't fill out, make note of them for later in the exercise.

The Strategy Document is a collaborative place to align with stakeholders about project deliverables. You will work together to establish information about dashboard functionality and associated metrics and charts.

This is a time to explore what metrics will be required, how metrics are calculated, and any limitations or assumptions that exist about the data. Stakeholders think through these details and help the BI professional make final project decisions. Then, the BI professional provides stakeholders with a dashboard mockup to get useful feedback.

Generally, the BI professional will create the document and request review and sign-off from stakeholders. Then, they can begin working on the project with all of the details they need.

Step 5: Write follow-up questions for your client

By now, you've filled out each of the templates with information from the interview. But you might have noticed that you're missing some information for fields in the template. In a professional setting, you might need to ask a client follow-up questions to properly complete planning documents.

Write 3–5 questions about information that is missing from the interview notes. In a professional setting, you could ask these questions to your client to help you fully complete your documents.

Pro Tip: Save the template

Finally, be sure to save a blank copy of the templates you used to complete this activity. You can use it for further practice or in your professional projects. These templates will help you work through your thought processes and demonstrate your experience to potential employers.

Assessment of Exemplar

In this activity, you practiced completing key BI planning documents based on a realistic scenario. The scenario was intentionally missing important information, so part of your task was to identify what you were missing and come up with follow-up questions you could ask the stakeholder. This activity will prepare you to complete these forms in future projects throughout your career.

Project planning docs help you understand the needs and expectations of your stakeholders. This allows you to communicate with them effectively and better understand how to complete the project. You will be able to determine what information will most help you meet the project needs.

Your documents don't have to perfectly match these exemplars. The goal is to properly organize the information into the correct fields and understand how planning documents help you prepare for a BI project. This is an opportunity for you to check your understanding, ensure that you've met the activity's expectations, and explore a possible solution.

In the **Stakeholder Requirements Document exemplar**, you'll notice that areas where you're missing information are highlighted in bold. In your own projects, you might find it helpful to note what you're missing directly on the document. Then, when you ask follow-up questions, you can replace those notes with the correct information.

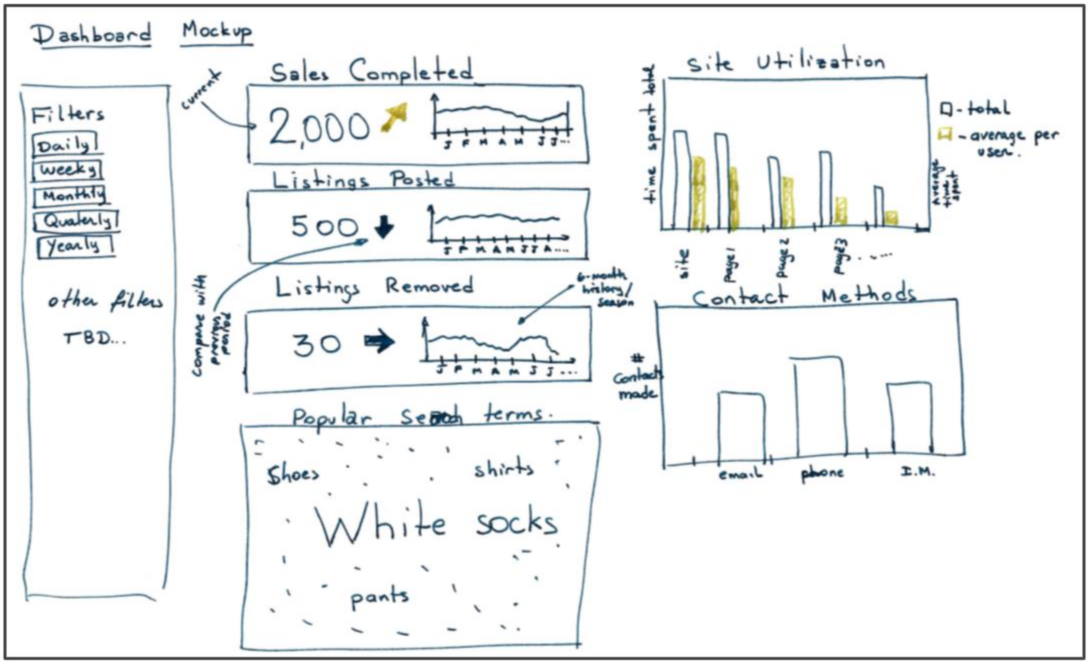
Most of the information in these docs is pulled directly from the notes in the activity's scenario. You might also reword something to summarize or expand on notes from the meeting. For example, the notes include "The goal is to understand how these buyers and sellers use their platform. The insights could then inform new-product design and improve the platform." You might translate this into the business problem section of the planning doc by wording it as "How do buyers and sellers use MarkIt's platform? How can MarkIt improve their platform?" This frames the language in the notes as a question instead of a statement.

In the **Project Requirements Document exemplar**, you need to assign each of the stakeholder's requests as "required," "desired," or "nice to have." A hint for what belongs where can be found in the language the stakeholders use. In the scenario notes, some of the requests might have "must," while others might have "can we?" or "should."

You'll also find that this document has more fields that are missing information. This can provide clues about what you should ask in follow-up meetings.

The **Strategy Document exemplar** is the longest document and has more missing information. But because this is the stage where you can determine what kinds of charts you might make, many of your answers can be left to your best judgment. Unless the stakeholder tells you what kinds of charts they want, you will need to use your BI expertise to decide what works best. In this scenario, the stakeholders didn't give you any chart type suggestions. This means you can make the decisions yourself or decide to follow up with the stakeholder for more guidance.

The Strategy Document is also where you might include a sketch of a mockup.



This mockup includes filters for timescales, such as daily, weekly, and monthly. It features the current status and historical charts of the following metrics: sales completed, listings posted, listings removed, and popular search terms. It has a bar chart comparing total site utilization with the average site utilization per user. It also has a bar chart with the distribution of contact methods used to submit support requests.

This sketch represents a first draft of what your dashboard might look like when you get to the visualization stage of a BI project. You'll learn more about mockups, including how to use a mockup to plan a dashboard, later in this program.

Key takeaways

Filling out planning documents is a helpful way to organize details from your conversations with stakeholders and prepare for a business intelligence project.