

Practice Peer-graded Assignment - Part 1: Create a Design Checklist

After reading the [project brief](#) and the personas, here are the design checklist to guide the exploration of the data and the design decisions for the final deliverables. The key objective with this activity is to be able to define audience (user), stakeholders (business or personal goals), and the dataset (Super Store).

[Basic Data Storytelling Design Checklist-TEMPLATE.pdf](#)

WHO

Who is the audience of this visualization (to whom are these findings ultimately being presented)?

It's a High Level Board Meetings involving key members who are going to take decisions

Audience	Description
Presenter	Sylvia - VP of Sales of ACME Superstore Key personas: good salesperson with focusing on growth but not great with numbers.
Board member - Terrence	Terrence - Active Board Member of Super Store Corporation Age: 56 - Gender: Male - Education: MBA Key personas/goals: - Wants quick clear and credible updates - Wants to ensure financial stability and make the company more efficient - Wishes to end fraud and abuse of company policy - Prefers data-driven decision making Limitation: Needs large fonts (poor eyesight)
Other board member	Monthly board meeting. There are 15 people in the audience looking at a big screen across a large room and also have a printed summary (handouts)

WHAT

What data will be used to answer this question? Is the data capable of providing the information you are looking for?

Data Source	Sample Data set in Excel format (Global Superstore.xls)
Time framing of data	Data set includes sale data so that order dates are specified in 2011, 2012, 2013 and 2014;

Data Source	Sample Data set in Excel format (Global Superstore.xls)
Key Data Points	<ul style="list-style-type: none"> - Sales, Discount, Order date, Profit, Geography - Category and Sub-Category and Segment of the product on sale - Shipping status and Shipping date of the order
Data features to answer predetermined questions	<ul style="list-style-type: none"> - Aggregation of Sales and discount data; - Relationship between discounted sales and profit; - Correlation of geography and time frame to discount; - Relationship between Customer discount preference (category, sub-category of the products); - Comparison of more or less profitable sales based on profit ratios; - Inventory and distribution decisions based on profitable sales;

What is/are the business question(s) this project will answer?

Question	Purpose
Where and When are discounted products most sold?	<ul style="list-style-type: none"> - Make more nimble inventory and distribution decisions; - Anticipate next moves in sales based on trends;
Which products are impacted by discounted sales?	<ul style="list-style-type: none"> - Review discount policy over Category, Sub-Category, Segment of product; - Detect fraud and abuse of company policy;
What is the correlation between profits and discounts over sales?	<ul style="list-style-type: none"> - Investigate statistically on discounted sales and profit; - Ensure financial stability and make the company more efficient;

How

How will your findings ultimately be displayed? Please list any special requirements of the user

Displayed	The deliverable will be displayed in a dynamically interactive driven dashboard.
Key Features	<ul style="list-style-type: none"> - Filtering facilities to explore data sets in different population; - Drill down charts to answer multiple questions;

Displayed	The deliverable will be displayed in a dynamically interactive driven dashboard.
Other requirements	<p>For Sylvia:</p> <ul style="list-style-type: none">- Clearly visual-oriented so that she can understand data correlating with numbers - Sylvia is not good at numbers and stats;- The analytics should be rather static/exploratory then actionable (Sylvia needs to turn the many findings by the retail analysts into a sales strategy).- Pre-highlighting the most meaningful in the reporting; <p>For Terrence: Keeping Large fonts (poor eyesight)</p> <p>Other:</p> <ul style="list-style-type: none">- The presentation must appear as a very synthetic view and easy to manipulate because Sylvia will have only 5-7 minutes to present to board members;- Starting with the top-level facts because board members don't understand the minutiae of the business and prefer quickly hearing key points;- The visualization will be viewed from a great distance across the room