**Strategy Document: [Project Name]**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| D.A. | Business Analyst | June 06, 2024 |

**Proposer:** Keith Portone (Project Manager) & Emma Santiago (Hiring Manager)

**Status:** [Draft] > Under review > Implemented | Not implemented (Highlight current status)

**Primary dataset:** N/A

**Secondary dataset:** N/A

## User Profiles

Used internally by the following team members:

**Stakeholders:**

* Emma Santiago, Hiring Manager
* Keith Portone, Project Manager
* Minna Rah, Lead BI Analyst

**Team members:**

* Ian Ortega, BI Analyst
* Sylvie Essa, BI Analyst

## 

# **Dashboard Functionality**

|  |  |
| --- | --- |
| **Dashboard Feature** | **Your Request** |
| Reference dashboard  (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.) | N/A |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | No information. Need to follow up to ask. |
| Scope  (What data should be included or excluded in this dashboard?) | Include:   * Number of calls * Number of repeat calls after first contact * Call type * Market city * Date |
| Date filters and granularity  (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a “granularity” drop-down? If so, what granularity should be selected by default?) | Should include the following timescales:   * Daily * Weekly * Monthly * Quarterly |

# **Metrics and Charts**

Create a table for each chart that you’d like to include in the dashboard. If you’d like to break the dashboard under different headers, feel free to list those here as well.

### Chart 1

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | \*\*\*Filters and Summary\*\*\* |
| Chart type  (What type of chart needs to be created?) | \*\*\*Filter and Summary\*\*\* |
| Dimension(s)  (What dimensions does this chart need to include?) | * Date type (daily, weekly, etc.) * Date range (dropdown or slider) * Market city (dropdown or multi-select) |
| Metric(s)  (What metrics are relevant to this chart?) | Summary Metrics:   * Total Number of Calls * Total Repeat Calls * Key Insights or Alerts (if any) |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Total Number of Calls |
| Chart type  (What type of chart needs to be created?) | Line |
| Dimension(s)  (What dimensions does this chart need to include?) | * Date type * Date range * Market City |
| Metric(s)  (What metrics are relevant to this chart?) | Number of calls |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Number of Repeat Calls After First Contact |
| Chart type  (What type of chart needs to be created?) | Bar or stacked bar |
| Dimension(s)  (What dimensions does this chart need to include?) | * Date range * Market City |
| Metric(s)  (What metrics are relevant to this chart?) | Number of Repeat Calls After First Contact  \*\*\*Note\*\*\* data will be lagging a few weeks |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Call Type Distribution |
| Chart type  (What type of chart needs to be created?) | Stacked bar chart or Pie chart |
| Dimension(s)  (What dimensions does this chart need to include?) | * Date range * Market City |
| Metric(s)  (What metrics are relevant to this chart?) | Call type |

### Chart 5

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Calls by Market city |
| Chart type  (What type of chart needs to be created?) | Map or Treemap |
| Dimension(s)  (What dimensions does this chart need to include?) | * Date range * Call type |
| Metric(s)  (What metrics are relevant to this chart?) | Number of calls |

### Dashboard mockup

