**Strategy Document: [Project Name]**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
|  |  |  |

**Proposer:** Emma Santiago, Hiring Manager

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

**Primary dataset:** market\_1, market\_2, market\_3

**Secondary dataset:**

## User Profiles

* Emma Santiago, Hiring Manager
* Keith Portone, Project Manager
* Minna Rah, Lead BI Analyst
* Ian Ortega, BI Analyst
* Sylvie Essa, BI Analyst

# **Dashboard Functionality**

|  |  |
| --- | --- |
| **Dashboard Feature** | **Your Request** |
| Reference dashboard | Build a dashboard to explore the number of repeat callers and their problem types in the three different market cities. |
| Access | Provided as read-only to the users listed in this document. |
| Scope  (What data should be included or excluded in this dashboard?) | Date, market, problem\_type, contact\_n and contact\_n\_#, where “#” is the number of days since between call and recall. |
| Date filters and granularity | Filters: Week, Month, Quarter.  Granularity: The charts with detailed metrics should be dynamic / interactive in order to allow viewing specific information |

# **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 | Repeat calls by first date |
| Chart type | Table |
| Dimension(s) | Day of initial call, following repeat calls |
| Metric(s) | Contact |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Market and Problem type of first repeat calls |
| Chart type | Bar |
| Dimension(s) | Call type, market, contact\_n\_1 |
| Metric(s) | contact |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Calls by market and type |
| Chart type | Table |
| Dimension(s) | Market, call type, day |
| Metric(s) | Contact |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeats by week, Month and quarter |
| Chart type | Bar |
| Dimension(s) | Date, Contact |
| Metric(s) | Date |

### Dashboard mockup

