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

Notes:

- Business request from Steven, a sales manager
- 'Improve our internet sales reports'
- 'Want to move from static reports to visual dashboards'
- 'How much we have sold of what products, to which clients, and how it has been over time'
- Each salesperson works on different products and customers, want to be able to filter them
- 'We measure our numbers against budget (added in a spreadsheet) so we can compare our values against performance'
- 'The budget is for 2024 and we usually look 2 years back in time when we do analysis of sales'

Business Demand Overview & User Stories:

Business Demand Overview:

- **Reporter:** Steven - Sales Manager
- **Value of Change:** Visual dashboards and improved sales reporting/follow-up for salesforce
- **Necessary Systems:** Power BI, CRM system
- **Other Relevant Info?:** Budgets have been delivered in Excel for 2024

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 better follow which products and customers sell the best	A Power BI dashboard that updates data once a day
2	Sales Rep	A detailed overview of internet sales per customer	Can follow-up my customers that buy the most and who we can sell more to	A Power BI dashboard that allows me to filter data for each customer
3	Sales Rep	A detailed overview of internet sales per product	Can follow-up my products that sell the most	A Power BI dashboard that allows me to filter data for each product
4	Sales Manager	To get a dashboard overview of internet sales	Follow sales over time against budget	A Power BI dashboard with graphs and KPIs comparing against budget