

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