**Business Demand Overview:**

* **Reporter**: Steven – Portfolio Manager
* **Value of Change**: Visual dashboards and improved stock market reporting or follow-up on stock performance and market indices.
* Necessary Systems: Tableau, CRM System.

**User Stories:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No #** | **As a (role)** | **I want (request / demand)** | **So that I (user value)** | **Acceptance Criteria** |
| **1** | Portfolio Manager | To get a dashboard overview of stock market performance over time. | Can follow better which are performing the best. | A tableau dashboard which updates data regularly. |
| **2** | Investment Analyst | A detailed overview of stock price movements by individual stock symbols. | Can follow up and identify potential upsell opportunities. | A Tableau dashboard that allows filtering data by individual clients or stock symbols. |