

Timothy - Sales Manager

Hi James!

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 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 2023 and we usually look **2 years back** in time when we do analysis of sales.

Let me know if you need anything else!

//Timothy

Business Demand Overview/Takeaways:

- Reporter: Timothy - Sales Manager
- Value of Change: Visual dashboards and improved Sales reporting
- Necessary Systems: Power BI, CRM System, MS SQL Server
- Necessary Actions: Create interactive dashboard to view sales, products sold, and clients over time. Filtering option for a variety of sales requests. KPI index for numbers against budget.
- Budget Spreadsheet: Delivered in Excel for 2023