Business Demand/Request

Steven - Sales Manager:

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

Overview

- Reporter: Steven – Sales Manager

- Value of Change: Visual dashboards and improved Sales reporting for sales team

- Programs needed: Power BI, CRM System

- Other Relevant Info: Budgets have been delivered in Excel for 2021-2022

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| **#** | **As a (role)** | **I want (request/demand)** | **So that I (user value)** | **Acceptance Criteria** |
| 1 | Sales Manager | A dashboard overview of internet sales | Understand which customers and products sell the best | Power BI dashboard updated daily |
| 2 | Sales Representative | A detailed overview of Internet Sales per Customers | Can follow up w/ customers that buy the most and to churn | Power BI dashboard w/ data filtered by customer |
| 3 | Sales Representative | A detailed overview of Internet Sales by Products | Understand which Products sell the most | Power BI dashboard w/ data filtered by product |
| 4 | Sales Manager | A dashboard overview of internet sales | Can follow sales over time against budget | A Power BI dashboard with graphs and KPIs against budget |