BRD for Loblaw -

1. Current Situation:

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Loblaws cannot currently monitor retention rates using real-time data. As a result, many customers showing early signs of disengagement are not identified promptly for targeted retention efforts. This reactive approach leads to increased churn, losing revenue and declining customer lifetime value.

2. Business Objectives

This project will develop a BI system that analyzes both real-time and historical customer data to identify those at high risk of churn. Additionally, it will automate the data update process to ensure that information is consistently refreshed on time.

3. Stakeholders

| Stakeholder/Group | Role/Title | Interest Level | Influence Level | Engagement Strategy |
| --- | --- | --- | --- | --- |
| Executive Leadership | CEO, CFO, CMO, VP-level Executives | High | High | Regular executive briefings, strategic dashboard summaries, in-person presentations, decision-making workshops |
| Product Owner / Lead BA | Business/Data Analyst Lead overseeing the project | High | High | Frequent updates during sprint reviews, detailed documentation, and direct involvement in prioritizing backlog items |
| Data Science Team | Lead Data Scientist, Data Analysts, Model Developers | High | High | Daily stand-ups, sprint planning meetings, collaborative code reviews, and technical workshops |
| IT Management | IT Director, Database Managers, Data Engineers | Medium | High | Regular technical integration meetings, clear documentation of data pipelines, and periodic progress reviews |
| CRM & Systems Admin | CRM Managers, Data Quality Managers | Medium | High | Periodic check-ins, technical support sessions, and coordination meetings to ensure data integrity and system reliability |
| Marketing Team | Marketing Directors, Campaign Managers, Digital Analysts | High | Medium | Weekly update meetings, tailored dashboard training, feedback sessions on campaign performance, and A/B testing reviews |
| Customer Service Team | Store Managers, Regional Managers | High | Medium | Hands-on dashboard training, regular briefings, and direct feedback loops to align engagement strategies with insights |
| Retail Operations | Store Managers, Regional Managers | Medium | Low | Informational updates via newsletters, periodic training on dashboard usage, and summary reports on regional trends |
| General End Users | Occasional dashboard users from non-core teams | Low | Low | Self-service training materials, occasional email updates, and access to online resources or FAQs regarding the new system |

4. Business Requirements

Customer Feature Map

1. Data Integration & ETL

* 1.1 Data Extraction
* 1.2 ETL Automation
* 1.3 Data Quality & Validation
* 1.4 Security & Access Controls

2. Predictive Analytics

* 2.1 Predictive Modeling
* 2.2 Real-Time Data Updates
* 2.3 Scalability & Performance

3. Business Intelligence & Reporting

* 3.1 Interactive Dashboard Development
* 3.2 Reporting & Automated Alerts
* 3.3 User Interface & Usability

4. Experimentation & Optimization

* A/B Testing Framework
* Customer Journey Mapping

5. Stakeholder & Process Management

* 5.1 Documentation & Training
* 5.2 Maintenance & Support
* 5.3 Compliance & Governance
* 5.4 Stakeholder Engagement & Communication

Features Table

Business Rules

| Requirement | Priority |
| --- | --- |
| Ability to handle customer data according to Loblaws’ data security and privacy policies and comply with applicable regulations. | Critical |
| Ability to validate data for accuracy and consistency before use in predictive models. | Critical |
| Ability to refresh data every 30 minutes before using in a predictive model | High |
| Ability to access BI dashboards and model output via role-based permissions to protect sensitive information. | High |
| Ability to maintain an uptime of at least 99% during business hour | High |
| Ability to deliver reports to designated stakeholders on a weekly basis. | Medium |
| Ability to audit and troubleshoot all changes to data models, ETL processes, and dashboards purposes. | Medium |

Functional Requirements

| Requirements | Priority |
| --- | --- |
| Ability to develop a predictive model that analyzes historical data to forecast churn risk. | Critical |
| Ability to extract data from CRM and transactional systems using SQL and to automate ETL processes | Critical |
| Ability to create interactive dashboards using Power BI and Tableau to display churn risk metrics, | Critical |
| Ability to integrate seamlessly with Loblaws’ existing CRM systems for continuous data retrieval and regular updates. | Critical |
| Ability to automatically clean and transform raw data into a structured format suitable for analysis and modeling. | High |
| Ability to implement a framework for conducting A/B testing on retention campaigns to assess and refine engagement strategies. | High |
| Ability to trigger alerts when a customer’s churn risk score exceeds a predefined threshold. | High |
| Ability to analyze historical customer data to identify behavior trends and inform model adjustments. | High |
| Ability to allow administrative users to manage roles and permissions for accessing dashboards and analytics tools. | Medium |

User Interface Requirements

| Ability to provide intuitive dashboard navigation that allows users to easily switch between different views (churn risk, customer engagement, KPIs). | High |
| --- | --- |
| Ability to allow users to customize visualizations by selecting date ranges and applying filters based on customer segments to suit their analysis needs. | High |
| The ability to display real-time data updates ensures timely insights are available to the user. | High |
| Ability to present a clean, uncluttered layout that facilitates easy interpretation of data and supports quick decision-making. | High |
| Ability to ensure the user interface is responsive and accessible across desktops, tablets, and smartphones to accommodate diverse user needs. | High |
| Ability to export dashboards and reports in multiple formats (e.g., PDF, Excel) and to share them via email. | Medium |
| Ability to provide accessible help documentation and support options, such as FAQs and contact support, to assist users in navigating the system. | Medium |
| Ability to comply with accessibility standards (e.g., WCAG) to ensure usability for all employees, including those with disabilities. | Medium |