

Business Requirements Document

1. Business Background

Sales leadership and executive stakeholders require an integrated analytics solution to evaluate sales performance and customer behavior. The organization needs structured dashboards that transform transactional sales data into strategic insights to support revenue growth, product optimization, and customer-centric decision making.

2. Business Objective

The primary objective is to develop two interactive Tableau dashboards that provide year-over-year sales visibility and customer intelligence. The solution will enable stakeholders to track performance trends, identify growth opportunities, and understand customer value drivers.

3. Stakeholders

- Sales Managers
- Executive Leadership
- Marketing Teams
- Business Strategy & Operations

4. Scope of the Solution

In Scope:

- Sales performance monitoring (Sales, Profit, Quantity)
- Year-over-year and monthly trend analysis
- Product subcategory performance comparison
- Weekly sales and profit benchmarking
- Customer behavior, distribution, and profitability insights

Out of Scope:

- Demand forecasting and predictive modeling
- Marketing attribution modeling
- Automated pricing or recommendation systems

5. Key Business Questions

- How is sales and profit performance evolving year-over-year?
- Which months, weeks, and product subcategories drive the highest and lowest performance?
- Which customers generate the highest profitability?
- How is customer engagement distributed across order frequency segments?

6. Key Performance Indicators (KPIs)

Sales Dashboard:

This includes Total Sales, Total Profit, Total Quantity, monthly and weekly trends, average benchmarks, and subcategory performance.

Customer Dashboard:

This includes Total Customers, Total Orders, Sales per Customer, customer distribution by number of orders, and Top 10 Customers by Profit.

7. Functional Requirements

- Compare current year vs previous year performance
- Analyze monthly and weekly sales patterns
- Evaluate profitability across products and customers
- Navigate seamlessly between Sales and Customer dashboards
- Interactively filter by product and geographic attributes

8. Visualization & Interactivity Requirements

- KPI tiles with year-over-year indicators
- Monthly trend charts highlighting best and worst months
- Weekly sales and profit trend views with average reference lines
- Product subcategory performance comparisons
- Customer distribution and Top 10 profitability views
- Interactive filters for year, category, subcategory, region, state, and city

9. Success Criteria

The project will be considered successful if it delivers a reliable executive-ready analytics solution that:

- Enables rapid performance assessment
- Highlights growth and risk areas
- Improves visibility into product and customer profitability
- Supports strategic and operational decision-making.

10. Key Deliverables

- Sales Performance Dashboard
- Customer Analytics Dashboard
- Defined KPI framework and analytical model