

Strategy Document: [Project Name]

Sign-off matrix:

Name	Team / Role	Date
Leonor Duarte	BI Analyst	05/12/2024
Emma Santiago	Hiring Manager	05/12/2024
Keith Portone	Project Manager	05/02/2024
Minna Rah	Lead BI Analyst	05/12/2024

Proposer: Emma Santiago, Keith Portone, Minna Rah

Status: Draft > Under review > Implemented | Not implemented

Primary dataset: Delivered

Secondary dataset: No secondary dataset available

User Profiles: Used internally by team members (Ian Ortega, Sylvie Essa) to deliver insights to executives.

Dashboard Functionality

Dashboard Feature	Your Request
Reference dashboard (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.)	None specified, no existing dashboard to model after.
Access (How should access to the dashboard be limited? Who needs to have access?)	Limited to stakeholders: Emma Santiago, Keith Portone, Minna Rah, Ian Ortega, Sylvie Essa.
Scope (What data should be included or excluded in this dashboard?)	Include data on number of calls, repeat calls, call type, market city, and date.
Date filters and granularity (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a “granularity” drop-down? If so, what granularity should be selected by default?)	Daily, weekly, monthly, quarterly, yearly timescales. Default to last 30 days.

Metrics and Charts

Create a table for each chart that you'd like to include in the dashboard. If you'd like to break the dashboard under different headers, feel free to list those here as well.

Chart 1

Chart Feature	Your Request
Chart title	Repeat Calls Trends
Chart type (What type of chart needs to be created?)	Line chart
Dimension(s) (What dimensions does this chart need to include?)	Date (weekly, monthly, quarterly)
Metric(s) (What metrics are relevant to this chart?)	Number of repeat calls

Chart 2

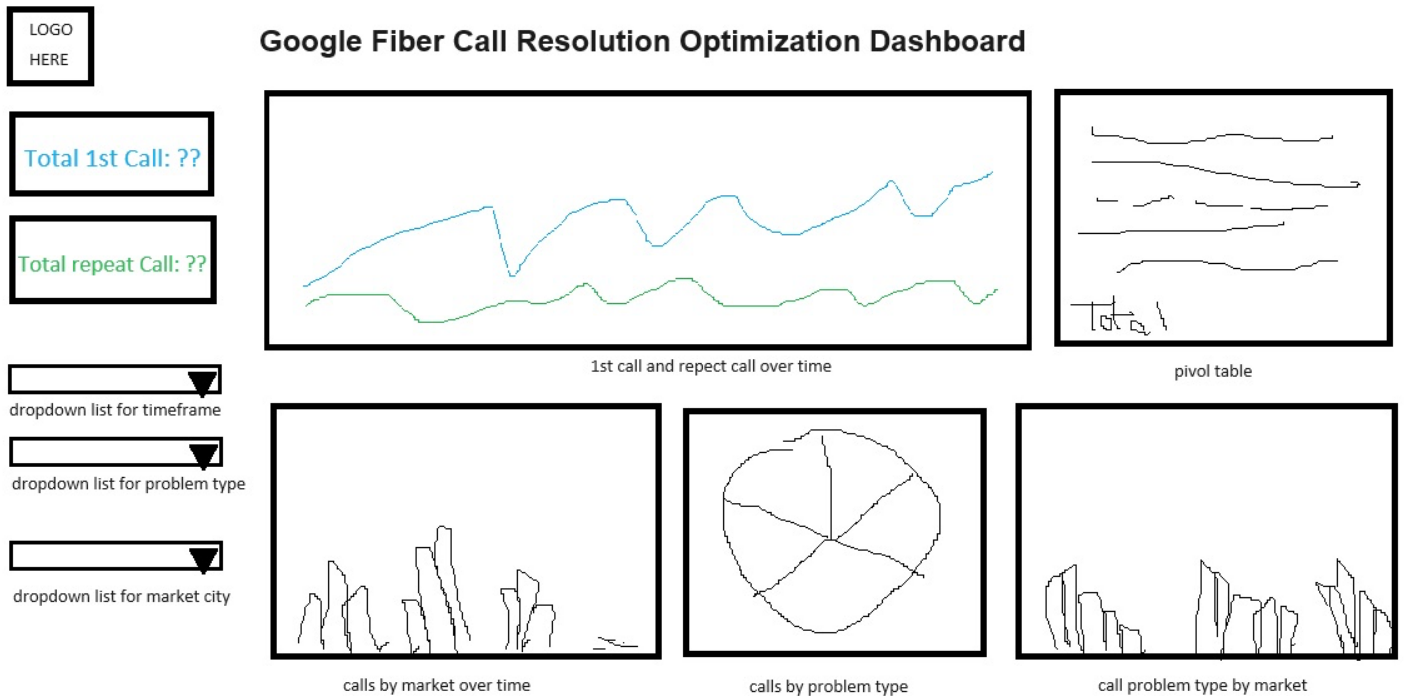
Chart Feature	Your Request
Chart title	Repeat Calls by Market and Problem Type
Chart type (What type of chart needs to be created?)	Stacked bar chart
Dimension(s) (What dimensions does this chart need to include?)	Market city, Problem type
Metric(s) (What metrics are relevant to this chart?)	Number of repeat calls

Chart 3

Chart Feature	Your Request
Chart title	Repeat Calls by First Contact Date
Chart type (What type of chart needs to be created?)	Line chart
Dimension(s) (What dimensions does this chart need to include?)	Date
Metric(s)	Number of repeat calls

(What metrics are relevant to this chart?)

Dashboard mockup



Next steps:

1. Review these documents to ensure all relevant details are included.
2. Identify any missing information or follow-up questions for stakeholders.
3. Develop a timeline and detailed plan for executing each phase of the project.