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**Project Document**

**Project Charter**

**Mission**

The purpose of this project is to develop a data warehouse and BI for Fudgemart and Fudgeflix stakeholders. They want to know which customers are both Fudgeflix and Fudgemart clients in order to market their plans and products accordingly. Stakeholders also want to know total revenue across both entities. They will use this information to assess performance metrics and KPIs.

**Business Case**

Stakeholders need to be able to see where there is overlap between the companies. This will allow them to get a clearer picture of customer behavior, which makes marketing to those customers more effective. Analytics is more effective when more data are available. Stakeholders can then measure performance by analyzing revenue across Fudgeflix and Fudgemart. Stakeholders will also be able to make more informed decisions about wage expenses by analyzing employee costs over time.

**Project Type**

The project is a hybrid strategic and tactical exercise. It has the potential to provide revenue and marketing breakthroughs over the long term, as well as possible short-term incremental increases.

**Stakeholders**

Stakeholders include the marketing, business analytics, and finance/accounting departments, as well the C-suite. Department and operations managers will use the data output to gauge financial performance in real time, and the C-suite will have the ability to see historical data to make comparisons.

**Goal**

The goal of the project is to implement a data warehouse with all the necessary tables to achieve the project mission. The data warehouse will feed data to a BI that will provide visualizations and KPIs to stakeholders.

**Project Team**

Cartney Thompson

Jack Harris

Michael Morales

**Project Plan**

The data warehouse will need a Fact Sales table for Fudgemart and an Account Billing table for Fudgeflix. We will need to build these with transformations for total Fudgemart revenue and total account billing for Fudgeflix. We will also build a Fact Revenue table with total revenue across both entities of Fudgecorp. These tables will be connected to dimensions for all tables needed for their completion.

**Functional Requirements**

* End users want to analyze orders within Fudgemart. This includes the order, the date of the order, the customer that made the order, the date the order was shipped.
* End users want to analyze products at Fudgemart. This includes information about the product.
* End users want to know total sales at Fudgemart.
* End users want to know who are Fudgemart customers.
* End users want to know who are Fudgemart and Fudgeflix customers (overlap).
* End users want to know who are Fudgeflix customers.
* End users want to analyze subscribers. This includes whether a subscriber is current, the interval on which they are billed, when they became a subscriber, and their current plan.
* End users want to know total revenue for FF and FM. They need orders and account billing revenue aggregated by day.
* End users want to analyze the cost of employees over time.

**Business Processes**

The ability to track total lifetime account billing for Fudgeflix customers including total amount billed, number of billing plans, and number of billing cycles for that customer is key to knowing revenue for Fudgeflix. The ability to track product sales for Fudgemart including the number of units ordered and the revenue from that specific order by product is equally important to know Fudgemart revenue. These two processes together will allow stakeholders to assess the performance of each entity separately and as a whole. This level of granularity will make business analytics more rigorous and powerful, and will allow for the setting of KPIs. This knowledge will also allow stakeholders to set benchmarks to encourage and measure increased performance.

Knowing where there is overlap between the entities will allow for more accurate recommendations as each additional variable provided to recommendation algorithms makes them more precise. This is similar to how Amazon Prime uses data from streaming services and orders. For instance, customers who have streamed the 2014 film “Unbroken” on Prime Video may be interested in reading the Lauren Hillenbrand biography of the same name via a physical book, their Kindle device or app, or the Audible app. Those same customers may then receive recommendations for Hillenbrand’s “Seabiscuit” or the Academy-Award-winning movie of the same title. Other book-to-movie recommendations can follow, which could lead to product recommendations as more data are gathered.

Lastly, the ability to track employee costs over time. This helps the business answer the question around expenses and where the human resources and finance department can optimize.

**Primary Roles**

Cartney Thompson – Functional requirements and business processes, high-level dimensional modeling worksheet, detailed dimensional modeling worksheet, debugging, Power Bi, presentation

Jack Harris – Functional requirements and business processes, high-level dimensional modeling worksheet, implementing dimensional models, ETL, SSAS, debugging, Power BI

Michael Morales – Project charter, project document, functional requirements and business processes, high-level dimensional modeling worksheet, Power BI, debugging, presentation