Project Requirements Document: [Project Name]

## **BI Analyst:** Ryan Mansfield

## **Client/Sponsor:** Emma Santiago, hiring manager

## **Purpose:** (Briefly describe why the project is happening and why the company should invest resources in it.)

To produce a dashboard exploring volume and types of repeated calls to a call center in order to enable Google to better meet customer needs in an effort to reduce call volume and increase customer satisfaction

## **Key dependencies:** (Detail the major elements of this project. Include the team, primary contacts, and expected deliverables.)

Data is “fake” and thus there is no need to ammonize it, though that can be good practice. Still, stakeholders should have access to the data at all times so they can understand my process.

## **Stakeholder requirements:** (List the established stakeholder requirements, based on the Stakeholder Requirements Document. Prioritize the requirements as: R - required, D - desired, or N - nice to have.)

* Understand frequency of repeated calls from same customer in order to gauge how effectively we are solving their issues. R
* Generate insights into what types of customer issues lead to more of these calls. D
* Explore trends in the three cities R
* Design charts that can be used to view trends by week, month, quarter, or year R
* A chart of table of repeat calls by the date of first contact R
* A chart or table exploring by both market and problem type R
* Charts showcasing repeated calls by week, month, and quarter D

## **Success criteria:** (Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria.)

S- specific details of characteristics and frequency of repeated callers

M- measurements on how often we repeated calls occur and characteristics of problems that lead to them. Also take into account the trends in each city

A- We most create insights that allow us to understand customer needs and satisfaction via and understanding of what situations lead to a repeated call

R- Results should focus on answering how often customer call back and why

T- by exploring trends over time we can explore peaks in repeated calls and trends over time

## **User journeys:** (Document the current user experience and the ideal future experience.)

The dashboard needs to demonstrate our understanding of the problems. The team wants to understand cause of repeat calls in order to reduce their volume, improve operational organization, and improve customer satisfaction. The dashboard should also provide insights into the problems in different markets.

## **Assumptions:** (Explicitly and clearly state any assumptions you are making.)

Data is fake and also ammonized so we have market\_1 market\_2 and market\_3 instead of city names

We also have 5 type of issues

* Type\_1 is account management
* Type\_2 is technician troubleshooting
* Type\_3 is scheduling
* Type\_4 is construction
* Type\_5 is internet and wifi

Repeated call are recorded over 7 day period as contact\_n\_number where n is the contact number and number is number of days so an additional contact on contact 1 5 days later would be contact\_1\_5 while the initial would be contact\_1

## **Compliance and privacy:** (Include compliance, privacy, or legal dimensions to consider.)

Not applicable as it’s fake data, still ensure access. But if it was real we’d remove customer names, dob, etc if present

## **Accessibility:** (List key considerations for creating accessible reports for all users.)

Use large text and text to speech as alternatives for those with disabilities

**Roll-out plan:** (Detail the expected scope, priorities and timeline.)

We have 6 weeks