**Strategy Document: [Project Name]**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
|  |  |  |

**Proposer:** [Ryan Mansfield BI analyst

**Status:** [Draft] > Under review > Implemented | Not implemented (Highlight current status)

**Primary dataset:**

market\_1, market\_2, market\_3

**Secondary dataset:**

## User Profiles [Who is the intended audience for this dashboard? How do you expect them to use this dashboard?]

* Emma Santiago, Hiring Manager
* Keith Portone, Project Manager
* Minna Rah, Lead BI Analyst Ian Ortega, BI Analyst
* Sylvie Essa, BI Analyst

# **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.) | Create a dashboard to explore trends in repeated calls across 3 different markets as well as problem types |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | Read only to those listed above |
| Scope  (What data should be included or excluded in this dashboard?) | Date, market, problem type, contact\_n, contact\_n\_numner |
| 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?) | Filter by day, week, month, quarter, year  Granularity: we should have drop down menus to look deeper into charts with detailed metrics so we can get more information |

# **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 | First date and repeat calls |
| Chart type  (What type of chart needs to be created?) | Bar |
| Dimension(s)  (What dimensions does this chart need to include?) | Date of contact(s) |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Understanding problems by market |
| Chart type  (What type of chart needs to be created?) | Bar |
| Dimension(s)  (What dimensions does this chart need to include?) | Market, problem, call type, contact |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Number of calls by type and market |
| Chart type  (What type of chart needs to be created?) | Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Call type, problem type, contact, date, market |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeat calls by time |
| Chart type  (What type of chart needs to be created?) | Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Time: filter by day, week, month, quarter, or year contact, call type, problem type |
| Metric(s)  (What metrics are relevant to this chart?) | Date |

### Dashboard mockup

[Include mockup sketch here.]