**Strategy Document: [Grow Cyclistic's customer base]**

**Sign-off matrix:**

| **Name** | **Team / Role** | **Date** |
| --- | --- | --- |
| Marco Morettini | BI Analyst | 16.07.2023 |

**Proposer:** Cyclistic

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

**Primary dataset:** The primary dataset for this project is the trip data that includes start time, end time, start location, end location, bike ID, and user type for each trip.

**Secondary dataset:** The secondary datasets for this project are the station data that includes station number, latitude, longitude, zip code, neighborhood name, and borough for each station; and the weather data that includes date, precipitation amount, temperature range, wind speed range, humidity range, cloud cover range for each day.

## User Profiles [Who is the intended audience for this dashboard? How do you expect them to use this dashboard?]The intended audience for this dashboard are the stakeholders of the project, especially the customer growth team. They are expected to use this dashboard to:

## • Understand customer demand at different station locations

## • Understand how the current line of bikes are used

## • Identify popular destination locations based on trip duration

## • Analyze trends from the summer of 2015

## • Calculate percent growth in the number of trips year over year

## • Gather insights about congestion at stations

## • Gather insights about peak usage by time of day, season, and the impact of weather

## • Apply customer usage insights to inform new station growth

## • Communicate their findings and recommendations to the leadership team

# **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.) | his dashboard does not need to be modeled on an existing dashboard |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | The access to the dashboard should be limited to the stakeholders of the project, who are:  • Adhira Patel, API Strategist  • Megan Pirato, Data Warehousing Specialist  • Rick Andersson, Manager, Data Governance  • Tessa Blackwell, Data Analyst  • Brianne Sand, Director, IT  • Shareefah Hakimi, Project Manager  • Sara Romero, VP Marketing  • Ernest Cox, VP Product Development  • Jamal Harris, Director, Customer Data  • Nina Locklear, Director, Procurement |
| Scope  (What data should be included or excluded in this dashboard?) | The data that should be included in this dashboard are:  • The trip data that includes start time, end time, start location, end location, bike ID, and user type for each trip  • The station data that includes station number, latitude, longitude, zip code, neighborhood name, and borough for each station  • The weather data that includes date, precipitation amount, temperature range, wind speed range, humidity range, cloud cover range for each day |
| 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?) | The dashboard should include date filters to allow the users to select a specific time frame for the analysis. The default time frame should be the last 12 months to capture the seasonality effects. The dashboard should also include a granularity drop-down to allow the users to choose the level of detail for the analysis. The granularity options should be day, week, month, quarter, and year. The default granularity should be month to provide a balanced view of the trends and patterns. |

# **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 | Number of trips by starting location |
| Chart type  (What type of chart needs to be created?) | Map |
| Dimension(s)  (What dimensions does this chart need to include?) | Station number, latitude, longitude, zip code, neighborhood name, borough |
| Metric(s)  (What metrics are relevant to this chart?) | Count of trips |

### Chart 2

| **Chart Feature** | **Your Request** |
| --- | --- |
| Chart title | Popular destination locations by trip duration |
| Chart type  (What type of chart needs to be created?) | Bar chart |
| Dimension(s)  (What dimensions does this chart need to include?) | End location, user type |
| Metric(s)  (What metrics are relevant to this chart?) | Sum of trip duration |

### Chart 3

| **Chart Feature** | **Your Request** |
| --- | --- |
| Chart title | Trends from the summer of 2015 |
| Chart type  (What type of chart needs to be created?) | Line chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Date, user type |
| Metric(s)  (What metrics are relevant to this chart?) | Count of trips |

### Dashboard mockup

[Include mockup sketch here.]

