**Strategy Document: Cyclistic Customer Usage Dashboard**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| Michael Guo | BI Engineer | 11/11/23 |

**Proposer:** Sara Romero – VP of Marketing

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

**Primary dataset:** NYC Citi Bike Trips

**Secondary dataset:** Census Bureau US Boundaries

## User Profiles

The intended audience for this dashboard is high level leaders within Cyclistic. They expect the dashboard to provide insights into various factors affecting their customers’ usage of their bikes in NYC.

# **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.) | N/A |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | Sara Romero, Ernest Cox, Jamal Harris, and Nina Locklear need access to the dashboard. |
| Scope  (What data should be included or excluded in this dashboard?) | Include:   * Trip start time and location * Trip end time and location * Rented bike identification numbers * Type of customer * Weather Data   Exclude:   * Personal Customer Info (name, email, phone, address) |
| 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?) | Date filters: Yes   * Default: Previous Year?   Granularity:   * Day/Month/Year |

# **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 per starting location |
| Chart type  (What type of chart needs to be created?) | Map/Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Location station  Location zip code  Location neighborhood  Location borough |
| Metric(s)  (What metrics are relevant to this chart?) | Number of trips leaving station |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Top Destination Locations |
| Chart type  (What type of chart needs to be created?) | Map |
| Dimension(s)  (What dimensions does this chart need to include?) | Location station  Location zip code  Location neighborhood  Location borough |
| Metric(s)  (What metrics are relevant to this chart?) | Number of trips arriving at station |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Trends |
| Chart type  (What type of chart needs to be created?) | Line/Bar |
| Dimension(s)  (What dimensions does this chart need to include?) | Day/Week/Month  Station ID/Zipcode/neighborhood/borough |
| Metric(s)  (What metrics are relevant to this chart?) | Weather status (rained or clear)  Total Number of Trips |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Percent Growth Per Year |
| Chart type  (What type of chart needs to be created?) | Line |
| Dimension(s)  (What dimensions does this chart need to include?) | Year |
| Metric(s)  (What metrics are relevant to this chart?) | Percentage increase in number of departing/arriving trips (number of departing/arriving trips) |

### Dashboard mockup