**Strategy Document: [Project Name]**

**Sign-off matrix:**

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

**Proposer:** [Name and title]

-Emma Santiago (Hiring Manager)

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

**Primary dataset:** Market\_1, Market\_2, Market\_3

**Secondary dataset:** N/A

## 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.) | Build a new dashboard to explore customers number of repeat calls and their problem/inquiry types in 3 different market cities. |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | Access will be provided as read-only to the user profiles listed in this document. |
| Scope  (What data should be included or excluded in this dashboard?) | Fields include: date, market, problem\_type,  contact\_n and contact\_n\_# |
| 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?) | Data filters can be applied for the following:  Week, Month, Quarter  Granularity:  Any chart with detailed metrics should have the  ability to click on that metric to view specific  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 | Repeat calls by first date |
| Chart type  (What type of chart needs to be created?) | Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Date/Day of initial call, subsequent repeat calls |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeat calls by Market type and call type of first repeat calls. |
| Chart type  (What type of chart needs to be created?) | Bar |
| Dimension(s)  (What dimensions does this chart need to include?) | Market, call type, contact\_n\_1 |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeat calls by week, month and quarter |
| Chart type  (What type of chart needs to be created?) | Bar |
| Dimension(s)  (What dimensions does this chart need to include?) | Date,Contact |
| Metric(s)  (What metrics are relevant to this chart?) | Date |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Calls by Market and Type |
| Chart type  (What type of chart needs to be created?) | Table |
| Dimension(s)  (What dimensions does this chart need to include?) | Market, call type, day |
| Metric(s)  (What metrics are relevant to this chart?) | Contact |

### Dashboard mockup

[Include mockup sketch here.]