Product Requirements Document

Customer KPI Update Tool

Version 1.0

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Status: Draft

1. Overview

The Customer KPI Update Tool is a browser-based web application designed for store managers to generate formatted weekly customer KPI updates for their team. It produces both a copy-and-paste WhatsApp message and a downloadable visual infographic, enabling managers to keep their teams informed about performance against targets and encourage healthy competition.

1.1 Problem Statement

Store managers currently have to manually collate data from PowerBI, format it into a readable message, and create visuals by hand each week. This is time-consuming, inconsistent, and often skipped. There is no standardised way to present weekly KPI performance to front-line team members via WhatsApp, which is the primary communication channel for most store teams.

1.2 Solution

A lightweight, browser-based tool that accepts PowerBI export data (CSV/Excel), processes it against defined targets, and outputs a formatted WhatsApp-ready text message alongside a comprehensive visual/infographic. No installation, no login, no persistent data storage required.

1.3 Target Users

Primary: Store managers who need to communicate weekly KPI performance to their teams. The tool is designed for a single store at a time and does not support cross-store comparison. However, the tool itself can be shared with and used by managers at other stores.

2. KPI Definitions & Targets

KPI	Description	Target	Tracking Level	Target Scope
Club New Look (CNL)	New loyalty sign-ups attributed to the store	25 / week	Store-level only	Store-wide weekly
Digital Receipts	% of transactions where email receipt was captured vs total transactions	80%	Individual (till login)	Per team member
Order in Store (OIS)	Revenue generated through in-store ordering of online stock	£200 / week	Individual	Store-wide weekly

2.1 Tracking Level Implications

- **CNL:** Cannot be attributed to individual team members. Displayed as a store-level aggregate only. No individual leaderboard for this KPI.
- **Digital Receipts:** Tracked per team member via till login. Individual leaderboard is possible and expected.

- **OIS:** Tracked per team member. Individual leaderboard is possible and expected.

3. Retail Period Structure

The application uses the company's retail calendar, not the standard Gregorian calendar. Each period consists of 4–5 consecutive weeks. Examples:

Period	Start Date	End Date	Weeks
Period 11	25/01/2026 (Wk 44)	21/02/2026 (Wk 47)	44, 45, 46, 47
Period 12	22/02/2026 (Wk 48)	28/03/2026 (Wk 52)	48, 49, 50, 51, 52

The manager will need to configure the period structure (start date, end date, weeks) when setting up each period. The tool will use this to determine which week of the period the current data belongs to and to display week-on-week trends across the full period.

4. Data Input

4.1 Primary Method: Manual Upload

The manager exports the relevant report(s) from PowerBI as a CSV or Excel file and uploads them to the tool. The tool parses the file and extracts the required data fields.

4.2 Required Data Fields

The tool must be able to parse the following from uploaded files:

For store-level CNL data:

- Week number or date
- Total CNL sign-ups for the store

For individual-level Digital Receipts data:

- Team member name or identifier
- Number of digital receipts captured
- Total number of transactions served
- Week number or date

For individual-level OIS data:

- Team member name or identifier
- OIS revenue generated (£)
- Week number or date

4.3 Future Enhancement: PowerBI Direct Integration

A future version may support direct connection to PowerBI via API, which would require authentication. This is out of scope for v1.0 but should be considered in the technical architecture to avoid costly refactoring later.

4.4 Data Persistence

The tool does not require a backend database. All data for the current period can be held in browser local storage or session storage. The manager uploads data weekly and the tool accumulates it across the period for week-on-week comparison. A "Reset Period" function should be available to clear stored data when a new period begins. An export/import function for the stored data (as JSON) would allow managers to back up their period data or transfer it between devices.

5. Core Features

5.1 Dashboard View

The main screen after data upload. Shows a summary of all three KPIs for the current week at a glance:

- CNL sign-ups vs 25 target (progress bar or gauge)
- Store-wide Digital Receipt % vs 80% target
- Store-wide OIS total vs £200 target

Each KPI card should use colour coding: green if at or above target, amber if within 80% of target, red if below 80%.

5.2 Leaderboards

Two separate leaderboards for the individually-tracked KPIs:

Digital Receipts Leaderboard:

- Ranked by Digital Receipt capture percentage (highest to lowest)
- Shows: Rank, Team Member Name, Receipts Captured, Total Transactions, Capture %
- Highlight the top performer with a visual indicator (e.g. trophy/star icon or gold row)

OIS Leaderboard:

- Ranked by OIS revenue (highest to lowest)
- Shows: Rank, Team Member Name, OIS Revenue (£)
- Highlight the top performer similarly

CNL is excluded from leaderboards as it is store-level only.

5.3 Week-on-Week Tracking

For each KPI, display performance across all weeks in the current period (up to 5 weeks). This should be visualised as a simple line or bar chart showing the trend. Each week's data point should show the actual value and the target line for reference.

Trend indicators (e.g. ↑ ↓ →) should appear next to current week figures, comparing to the previous week. A toggle in settings allows the manager to switch trend indicators on or off.

5.4 Top Performer of the Week

A prominent section highlighting the best-performing team member for the current week. This should consider both Digital Receipts and OIS and could be determined by a simple formula, e.g. the team member who tops the most leaderboards, or the manager manually selects. If a tie, show both.

5.5 WhatsApp Message Generator

Produces a pre-formatted text message that can be copied to clipboard with a single tap/click. The message should be structured as follows:

Example WhatsApp Message Format:

```
📊  *Customer KPI Update — Week 46*

🆕  *Club New Look:* 18/25 sign-ups ↑
We're getting there! 7 more to hit target 🐾

🧾  *Digital Receipts:* 74% (target 80%) ↓
Let's push for that 80%! Remember to ask
every customer 🙏
🏆  Top: Sarah — 92%

🛒  *Order in Store:* £156/£200 ↑
Good progress! £44 to go
🏆  Top: James — £68

⭐  *Player of the Week:* Sarah

Keep it up team! 🔥
```

The message tone should be straight to the point with emojis and brief encouragement/coaching. The tool should auto-generate contextual encouragement based on performance vs target (e.g. positive reinforcement when above target, motivational nudges when below). The manager should be able to edit the message before copying.

5.6 Visual / Infographic Generator

Produces a downloadable image (PNG or JPEG) suitable for sharing alongside the WhatsApp message. The infographic should include:

- A header with the week number and period
- KPI summary cards for all three metrics with progress indicators
- Leaderboard tables for Digital Receipts and OIS
- A week-on-week trend chart spanning the period
- Top performer highlight

The visual must be optimised for mobile viewing (portrait orientation, high contrast, readable at small sizes). It should be generated client-side in the browser using Canvas or an SVG-to-image approach.

6. Settings & Configuration

Setting	Description	Default
Period Configuration	Define period name, start date, end date, and week numbers	Must be set manually
Team Members	Add/remove team member names (used for leaderboard display)	Parsed from upload
CNL Target	Weekly CNL sign-up target	25
Digital Receipt Target	Digital Receipt capture % target	80%
OIS Target	Weekly store-wide OIS revenue target	£200
Trend Indicators	Toggle trend arrows (↑↓) on/off in outputs	On
Message Tone	Optional: adjust auto-generated encouragement style	Encouraging

7. Technical Requirements

7.1 Platform

Requirement	Detail
Type	Browser-based web application (SPA)
Responsive	Fully responsive — must work on mobile and desktop browsers
Installation	None required. Accessible via URL.
Authentication	None for v1.0 (no sensitive data stored server-side). Future PowerBI integration would require OAuth.
Data Storage	Browser local storage only. No backend database. Export/import via JSON for backup.
Hosting	Static hosting (e.g. Vercel, Netlify, GitHub Pages) — no server required for v1.0.

7.2 Technology Recommendations

- Frontend framework: React or Vue.js (component-based, good ecosystem for charting)
- File parsing: PapaParse (CSV) or SheetJS (Excel) for client-side file parsing
- Charting: Chart.js or Recharts for trend visualisation
- Image generation: html2canvas or dom-to-image for infographic export
- Clipboard: navigator.clipboard API for WhatsApp message copy

7.3 File Upload Parsing

The tool must handle variations in PowerBI export formats. A configuration/mapping step during first upload should allow the manager to map columns from their export to the

required fields (e.g. "This column is Team Member Name", "This column is Digital Receipt Count"). This mapping should be remembered (in local storage) for subsequent uploads.

8. User Flow

1. **First-time setup:** Manager configures the current retail period (name, start/end dates, week numbers) and verifies default KPI targets.
2. **Weekly data upload:** Manager exports reports from PowerBI and uploads the file(s) to the tool.
3. **Column mapping (first time only):** If the file format hasn't been seen before, the manager maps columns to required fields.
4. **Review dashboard:** Tool displays KPI summary, leaderboards, and trends.
5. **Generate outputs:** Manager clicks "Generate WhatsApp Message" and/or "Download Infographic".
6. **Edit & send:** Manager reviews/edits the WhatsApp message, copies to clipboard, and pastes into the team group chat alongside the infographic image.
7. **New period:** At end of period, manager exports data (optional backup), resets, and configures new period.

9. Out of Scope (v1.0)

- Direct PowerBI API integration (planned for future)
- Cross-store data comparison or multi-store dashboards
- User accounts, authentication, or role-based access
- Server-side data storage or database
- Automated WhatsApp sending (API or bot integration)
- Native mobile app
- Historical period archiving beyond the current period (JSON export covers this manually)

10. Success Metrics

The tool will be considered successful if it meets the following criteria:

- Reduces the time to produce a weekly KPI update from 15–20 minutes to under 3 minutes
- Produces consistent, professional outputs that the team finds engaging and informative
- Is adopted as a weekly habit by the store manager without friction
- Encourages measurable improvement in Digital Receipt and OIS performance through healthy competition

11. Risks & Mitigations

Risk	Impact	Mitigation
PowerBI export format changes	File parsing breaks	Column mapping feature allows re-mapping without code changes

Browser local storage cleared	Period data lost	JSON export/import feature for backups
KPI targets change	Outputs show wrong targets	Targets are configurable in settings
Team finds leaderboard discouraging	Negative team morale	Message tone emphasises encouragement; manager can edit before sending

12. Future Considerations

- PowerBI direct integration via API (OAuth authentication required)
- Period templates: pre-loaded retail calendar for the full year so managers don't configure each period manually
- Customisable infographic themes/branding
- Streak tracking (e.g. "Sarah has been #1 in Digital for 3 weeks running")
- Automated scheduling: trigger update generation on a set day each week
- Additional KPIs as the business introduces them