Create alignment and build relationships for a new project

Sales Performance Analysis

People 2-10

Time 2-4 hours

Difficulty Beginner

This document charters the Sales Performance Analysis project. Its primary objective is to develop and implement a comprehensive analytics dashboard to track key sales metrics, identify market trends, and provide actionable insights. This initiative will directly support the strategic goal of enhancing sales effectiveness and driving sustainable revenue growth for Apex Devices.

Agenda

1. What We Know So Far
2. Hopes & Fears
3. Project Goals
4. Defining Success
5. Team Core & Desired Capabilities
6. Collaboration Agreements
7. Risks
8. Wrap Up

Before this meeting

Plan your project in full before this meeting with the Project Planning Template.

Resources

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1 What We Know So Far

Project Name
Apex devices
Sales Performance Analysis

Background Information
Apex wants to make data driven decision making as a part of their work culture and taking their first big step towards that by embeding a Power BI tool in the organisation

Helpful Links *Double click to open*
Link in anything that would help project members get up to speed on the project.

Key Players

Product Owner
Nick Puri
Business Development Director

Executive Sponsor
Stan Kohli
CEO

D & A Lead
Tony Sharma
Senior Data Analyst

IT Lead
Jarvis Singh
Data Engineer

Objective
Enable quick Insights for business across markets and data driven decision making. Enable 'Start the day with analysis'

Success Measures
A functional dashboard is implemented with key business metrics as specified.

Users are able to use the tool in their busines review meetings and in their decision making process such as customer negotiation, new product launch, marketing promotions, finance budgeting etc.

Timeline

Project Definition — W2 — W4 — W6 — W8

Provide the dashboard for UAT

Users begin using the tool

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2 Hopes & Fears — 10 min

Hopes
- Data Driven Decision making
- Effective Communication
- Avoid manual work
- Transparency in data

Fears
- Data Constraints & Complexities
- Feature Creep

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3 Project Goals — 10 min

What problem are we trying to solve?

Who
Executives, Finance, Supply Chain, Sales & Marketing teams

What
Unlock insights and enable data driven decision making

When/Where
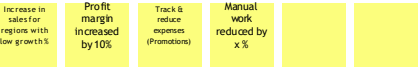Q2 of FY 2022

Why
care about it?

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4 Defining Success — 15 min

What will allow us to say that we have won?

Future Headlines
Imagine the project is done and it's a HUGE success! Write a short 2-3 sentence press brief of why this was such a big success.

- Increase in sales for regions with low growth%
- Profit margin increased by 10%
- Track & reduce expenses (Promotions)
- Manual work reduced by x%

Create Measurable Success Metrics
When can we call this project a success?
10 % Increase in Profit Margin
Find time saved by automation
Attrition rate to be reduced (from 20% to 10%)

*Add key features surfaced here to the defining the scope section.

**When time permits, turn your top ideas into a cover.

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5 Team Core & Desired Capabilities — 10 min

Person

Core Capability

Desired Capability

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6 Collaboration Agreements — 10 min

Weekly meeting with PO

Bi Weekly update on milestones

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7 Risks — 10 min

What could derail this project or this milestone?

- Resource shortage
- Data Constraints & Complexities
- Feature Creep

WRAP UP

Key Takeaways & Observations

Next Steps

Share your feedback