**Stakeholder Requirements Document: [Google Fiber]**

**BI Professional:** Salma Gouda

**Client/Sponsor:** Emma Santiago, Hiring Manager

**Business problem:** (What is the primary question to be answered or problem to be solved?)

The team’s ultimate goal is to reduce call volume by increasing customer satisfaction and improving operational optimization. My dashboard should demonstrate an understanding of this goal and provide stakeholders with insights about repeat caller volumes in different markets and the types of problems they represent.

primary question: How often does the customer service team receive repeat calls from customers?

**Stakeholders:** (Who are the major stakeholders of this project, and what are their job titles?)

* Emma Santiago, Hiring Manager
* Keith Portone, Project Manager
* Minna Rah, Lead BI Analyst
* Ian Ortega, BI Analyst
* Sylvie Essa, BI Analyst

**Stakeholder usage details:** (How will the stakeholders use the BI tool?)

Stakeholders will use the BI tool to explore how often customers are calling customer support after their first inquiry in different markets with different problems.

**Primary requirements:** (What requirements must be met by this BI tool in order for this project to be successful?)

* A chart or table measuring repeat calls by their first contact date.
* A chart or table exploring repeat calls by market and problem type.
* Charts showcasing repeat calls by week, month, and quarter.
* Provide insights into the types of customer issues that seem to generate more repeat calls.
* Explore repeat caller trends in the three different market cities.
* Design charts so that stakeholders can view trends by week, month, quarter, and year.

**Project Requirements Document: [Google Fiber]**

**BI Analyst:** Salma Gouda

**Client/Sponsor:** Emma Santiage, Hiring Manager

**Purpose:** (Briefly describe why the project is happening and why the company should invest resources in it.)

As part of the interview process, the Fiber customer service team has asked for a dashboard using fictional call center data based on the data they use regularly on the job to gain insights about repeat callers.The team’s ultimate goal is to reduce call volume by increasing customer satisfaction and improving operational optimization. My dashboard should demonstrate an understanding of this goal and provide stakeholders with insights about repeat caller volumes in different markets and the types of problems they represent.

**Key dependencies:** (Detail the major elements of this project. Include the team, primary contacts, and expected deliverables.)

This fictional dataset is a version of actual data the team works with. Because of this, the data is already anonymized and approved. I need to make sure stakeholders have access to all datasets so they can explore the steps I’ve taken.

Primary contacts are Emma and Keith

**Stakeholder requirements:** (List the established stakeholder requirements, based on the Stakeholder Requirements Document. Prioritize the requirements as: R - required, D - desired, or N - nice to have.)

In order to continuously improve customer satisfaction, the dashboard must help Google Fiber

decision-makers understand how often customers are having to repeatedly call and what

problem types or other factors might be influencing those calls.

* A chart or table measuring repeat calls by their first contact date. R
* A chart or table exploring repeat calls by market and problem type. R
* Charts showcasing repeat calls by week, month, and quarter. D
* Provide insights into the types of customer issues that seem to generate more repeat calls. D
* Explore repeat caller trends in the three different market cities. R
* Design charts so that stakeholders can view trends by week, month, quarter, and year.  D

**Success criteria:** (Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria.)

Specific: BI insights must clearly identify the specific characteristics of a repeat calls, including how often customers are repeating calls.

Measurable: Calls should be evaluated using measurable metrics, including frequency and volume. For example, do customers call with a specific problem more often than others? Which market city experiences the most call? How many customers are calling more than once?

Action-oriented: These outcomes must quantify the number of repeat callers under different circumstances to provide the Google Fiber team with insights into customer satisfaction.

Relevant: All metrics must support the primary question: How often are customers repeatedly contacting the customer service team?

Time-bound: Analyze data that spans at least one year to understand how repeat callers change over time. Exploring data that spans multiple months will capture peaks and valleys in usage.

**User journeys:** (Document the current user experience and the ideal future experience.)

The team’s ultimate goal is to reduce call volume by increasing customer satisfaction and improving operational optimization. My dashboard should demonstrate an understanding of this goal and provide stakeholders with insights about repeat caller volumes in different markets and the types of problems they represent.

**Assumptions:** (Explicitly and clearly state any assumptions you are making.)

In order to anonymize and fictionalize the data, the datasets the columns market\_1, market\_2, and market\_3 to indicate three different city service areas the data represents.

The data also lists five problem types:

Type\_1 is account management

Type\_2 is technician troubleshooting

Type\_3 is scheduling

Type\_4 is construction

Type\_5 is internet and wifi

Additionally, the dataset records repeat calls over seven-day periods. The initial contact date is listed as contacts\_n. The other call columns are then contacts\_n\_number of days since first call. For example, contacts\_n\_6 indicates six days since first contact.

**Compliance and privacy:** (Include compliance, privacy, or legal dimensions to consider.)

The datasets are fictionalized versions of the actual data this team works with. Because of this,  
the data is already anonymized and approved. However, you will need to make sure that  
stakeholders have data access to all datasets so they can explore the steps you’ve taken.

**Accessibility:** (List key considerations for creating accessible reports for all users.)

Dashboard needs to be accessible, with large print and text-to-speech alternatives.

**Roll-out plan:** (Detail the expected scope, priorities and timeline.)

The stakeholders have requested a completed BI tool in six weeks.

**Strategy Document: [Project Name]**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| Salma Gouda | BI Developer | 2023-07-31 |

**Proposer:** Emma Santiage, Hiring Manager

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

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

**Secondary dataset:**

## User Profiles [Who is the intended audience for this dashboard? How do you expect them to use this dashboard?]

Emma Santiage, 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 the number of repeat callers and their problem types in three 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?) | 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 | Market and Problem 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?) | Call type, market, contact\_n\_1 |
| Metric(s)  (What metrics are relevant to this chart?) | contact |

### Chart 3

|  |  |
| --- | --- |
| **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 |

### Chart 4

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Repeats by Week, Month, and Quarter |
| Chart type  [What type of chart needs to be created? This could include any chart type, including a line chart (timeseries), bar chart, or table.] | Bar |
| Dimension(s)  [What dimensions does this chart need to include?] | Date, contact |
| Metric(s)  [What metrics are relevant to this chart?] | Date |

### Dashboard mockup

[Include mockup sketch here.]