Stakeholder Requirements Document: Cyclistic

BI Professional: Jianyang Wu

Client/Sponsor: James Lee, Director, Customer Data

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

The Customer Growth team at Cyclistic is developing a plan to grow the business over the next few years. The team wants to understand how customers use bikes in different situations and gain key insights that may help shape business development strategies; their first priorities are to identify customer needs at different station locations and to determine user differences in user behavior between customers and subscribers.

Primary question: How can we draw promotion strategies for efficient customer growth and new station growth from customer user behavior insights?

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

- James Lee, Director, Customer Data
- Tina Li, Director, Procurement
- Alexa Schmidt, VP, Product Development
- Sacha Fischer, VP, Marketing

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

The team has two main use cases in this project, first of all, the team wants to effectively develop new station locations, secondly, they wants to draw strategies for customer increasing. The team plans to achieve their purposes by understanding customers' bike using behaviors. They will use this Tableau to gather insights related to data generated by the bike-trip records. Then, this information will be used to understand what customers want, what makes a successful product, what will attract more new customers or subscribers, and how new stations might alleviate demand in different geographical areas.

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

- Table visualization showing average trip minutes and number of trips by starting station location.

- Bar chart of total trip minutes sorted in descending order by all destination stations.
- Bar chart of total trip minutes sorted in descending order by all origin stations.
- Maps of different metrics focusing on trends for the summer of 2015.
- Three separate maps focusing on trends for July, August, and September 2015.
- Several line charts showing the number of trips and trip minutes for customers and subscribers at different temperatures and precipitation levels.
- Line chart and table showing the number of trips and trip minutes by month in two consecutive years.
- Gather insights on station congestion.
- Gather insights on the number of trips for all origin and end locations.
- Gather insights on peak usage by time of day, season, and weather impacts.