

# ProfitLift

## Business Requirements Document (BRD)

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Purpose: A clear, non-technical agreement on what will be built, how it helps day-to-day, and how we will confirm success.

## A. Executive Summary

ProfitLift is a Windows desktop app that helps your team spot the best add-on items and promotions for each store, season, and time window. It focuses on actions that raise incremental revenue without pushing low-margin discounts.

## B. Business Goals

- Raise average basket value with smart, context-aware add-ons.
- Improve attach rate where it matters, not just popular items everywhere.
- Cut promotion waste by focusing on actions likely to create real lift.
- Give the team a weekly, easy-to-read opportunity list they can act on.

## C. Scope

### In-Scope (Pilot)

- Windows app with dashboard pages: Rules, Recommended Bundles, What-If Simulator, Explanations.
- Load data from simple CSV files exported from your systems.
- Export opportunity lists to CSV or PDF.
- Evaluation report with plain-English findings and next steps.

### Out-of-Scope (Pilot)

- Direct integration to live POS systems.
- Customer PII handling. Loyalty IDs, if used, should be hashed.
- Operation playbooks or call-center scripts (can be added after pilot).

## D. Who Will Use It and Day-to-Day Flow

### Primary Users

- Category or Merchandising Manager: reviews weekly opportunities and decides actions.
- Trade or Promotions Lead: plans promos using the what-if view.
- Store or Regional Lead: checks local suggestions and shares feedback.

### Day-to-Day

- Monday: open dashboard, filter to target categories, download quick list of top bundles.
- Mid-week: try what-if for an upcoming promo; check projected effect.
- Friday: confirm actions for next week; export evidence pack if needed.

## E. Data We Need (Simple Terms)

- Transactions with date and time: lets us compare weekday vs weekend, morning vs evening.
- Items in each basket: to learn natural combinations.
- Price paid and any discount flag: to estimate real value and avoid wasteful actions.

- Store or region: to respect local differences.
- Optional margin or cost per item: helps rank by profit, not just popularity.

Privacy Note: we do not need names, phone numbers, or emails. Customer IDs are optional and should be hashed.

## F. What the App Shows

- Recommended Bundles: items that make sense together for the selected store or time window.
- Why It Makes Sense: a one-line explanation in plain English next to each suggestion.
- What-If View: try a planned promo window and see projected movement.
- Downloadable Lists: export the top actions to share with teams.

## G. How We Measure Success

- Attach Rate Uplift: did more baskets include the suggested add-on.
- Incremental Margin per Basket: did profit go up, not just sales.
- Time to Insight: hours from data drop to a clean shortlist.
- Team Adoption: did managers actually use the lists in weekly trade meetings.

## H. Project Plan and Milestones

Week	Milestone
1	Data drop and validation; first look at opportunities.
2	Dashboard walkthrough with your categories.
3	What-if planning and projected effects for chosen promos.
4	Final readout: top actions, projected impact, next steps.

Communication: weekly 30-minute check-in; shared notes and action list after each call.

## I. Risks, Assumptions, Responsibilities

### Key Risks and Safeguards

- Sparse data in some stores: we widen the context so suggestions remain reliable.
- Promo timing mismatches: we compare like periods to avoid misleading results.
- Low-margin push: ranking respects profit so we do not over-promote weak items.

### Assumptions

- Pilot runs on exported historical data; no live system connection is required.
- If margin or cost is missing, we can start with category-level averages.

### Responsibilities

- Client: provide the CSV exports and confirm 2 to 3 success metrics.
- Shenz (developer): deliver the app, dashboards, weekly updates, and the final report.

### Sign-Off

The pilot is complete when the app runs on a Windows laptop, the report shows movement on the agreed KPIs, and the opportunity list is ready for action.