Business Requirements Document(BRD)

Sales Analysis

Project Objective

The objective of this project is to analyze sales performance across customers, product categories, payment modes, and states.The dashboard will help stakeholders understand trends in revenue, cost, profitability, customer behavior, and regional performance.
It will support decision-making by highlighting top-performing products, states with strong sales, high-value customers, and payment mode preferences.

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3. Business Problem / Opportunity

The organization currently lacks a consolidated, visual, and interactive way to monitor sales performance.
Without proper analysis:

- High-revenue categories cannot be identified

- Low-performing states or products remain unnoticed

- No understanding of customer trends

- Profit leakage cannot be tracked

Opportunity:
A dashboard will provide clear insights into sales performance, customer behavior, and operational efficiency, enabling better strategic planning.

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4. Target Audience

- **Sales Managers** – to track revenue, quantity sold, and state performance

- **Business Analysts** – to analyze trends, compare categories, identify issues

- **Finance Team** – to monitor cost vs revenue

- **Management / Leadership** – to support decision-making

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5. Scope

In-Scope

- Sales analysis (Quantity, Total Sales, Total Cost, Profit)

- Category & Sub-Category performance

- State-wise analysis

- Customer-level insights

- Payment mode usage

- Time-based trends (Order Date)

Out-of-Scope

- Inventory management

- Supplier analysis

- Shipment tracking

- Return/refund forecasting (dataset does not contain return data)

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6. Data Source(s)

Primary Source

Name: Sales Dataset
Format: Excel
Records: 1194 rows
Fields:

ID,Order ID, Order Date, Customer Name, Category, Sub-Category, Quantity, Total_sales, Total_cost, Payment Mode, State

Type:

Transactional sales data

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7. Key Metrics / KPIs

- **Total Sales**

- **Total Cost**

- **Total Profit** = Total_sales – Total_cost

- **Quantity Sold**

- **Sales by Category**

- **Sales by Sub-Category**

- **Top Customers by Revenue**

- **Sales by State**

- **Payment Mode Distribution**

- **Year-wise Sales Trend**

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8. Deliverables

1. **BRD Document**

2. **Dataset Assessment Report**

3. **Data Model** (Fact + Dimensions)

4. **Dashboard Mockups**

5. **Power BI Dashboard**

6. **Analysis Summary Report**

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9. Timeline / Milestones (5-Day Plan)

Day	Task
Day 1	Dataset understanding, cleansing, and assessment
Day 2	Design data model, create fact & dimension tables
Day 3	Create dashboard mockups
Day 4	Build Power BI Dashboard
Day 5	Final insights, documentation, and presentation

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10. Notes / Assumptions

● Data is assumed to be accurate and complete.

● Profit = Total Sales – Total Cost (calculated field).

● States represent customers' delivery region.

● Payment modes are assumed to be correctly entered.

● More data can be added later without structure changes.