Business Requirement Document (BRD)

Project Title:
CRM Sales Opportunity Analysis Dashboard

1. Project Objective

The objective of this project is to analyze and visualize sales performance across agents, managers, and products to gain insights into revenue trends, deal stages, and overall business effectiveness. This dashboard aims to help decision-makers identify top performers, track deal progress, monitor targets, and optimize the sales process.

2. Business Problem / Opportunity

The organization currently manages sales opportunities through a CRM system but lacks a unified, data-driven view of performance. Without visual insights, it is difficult to track agent efficiency, deal status, and revenue growth patterns. This project provides an opportunity to convert raw CRM data into actionable insights that support better forecasting, performance tracking, and strategy planning.

3. Target Audience
• Sales Managers and Executives
• Business Analysts
• Product and Marketing Teams
• Senior Management and Stakeholders

4. Scope
In Scope:

• Data cleaning and transformation
• KPI calculations (Revenue, Win Rate, Deal Duration, etc.)
• Power BI dashboard creation (4 main pages + drill-throughs)
• Interactive features: bookmarks, filters, and drill-through pages

Out of Scope:

• Real-time data integration
• External system automation
• Predictive modeling or machine learning

5. Data Source(s)
• Dataset Name: CRM Sales Opportunities
• Source: Excel Dataset (Manually Cleaned)
• Data Type: Sales performance records (Agents, Managers, Products, Revenue, Dates, Deal Stages)

• Size: ~5,000+ records
• Key Columns: Agent Name, Manager, Product, Revenue, Close Date, Engaged Date, Deal Stage, Account, Sector

6. Key Metrics / KPIs

• Total Revenue
• Total Deals / Won Deals / Lost Deals
• Win Rate %
• Average Deal Close Days
• Best Performing Agent / Manager / Product
• Revenue by Product, Agent, and Sector
• Monthly and Quarterly Revenue Trends
• Target Achievement Progress

7. Deliverables

• Interactive Power BI Dashboard
• Data Model with DAX Measures
• Drill-through and Tooltip Pages
• Dashboard Documentation (BRD + Walkthrough Summary)

8. Timeline / Milestones

Day	Task	Description
Day 1	Data Collection & Cleaning	Remove blanks, validate dates, ensure accuracy
Day 2	Data Modeling	Create relationships, define DAX measures
Day 3	Dashboard Design	Build visuals, KPI cards, and layout
Day 4	Interaction Setup	Add bookmarks, drill-throughs, and navigation
Day 5	Review & Submission	Final check and documentation

9. Notes / Assumptions

• The dataset contains some blank Close Dates for ongoing deals.
• Target revenue is fixed at 20 million for KPI comparison.
• Only one dataset is used — no external API or real-time source.
• Dashboard is built entirely in Power BI Desktop.
• Designed with a dark theme, modern visuals, and consistent color palette for clarity and engagement.