Functional Requirement Document (FRD)

Project Name: CRM Sales Opportunity Dashboard

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Tool: Power BI

1. Dashboard Sections

The Power BI dashboard consists of the following key sections:

- CRM Sales Opportunity Overview: Displays overall KPIs such as Total Revenue, Win Rate %, and Deals Summary.
- Sales Performance Analysis: Evaluates sales agents and products by performance, success rate, and deal outcomes.
- Quarterly Overview / Trends: Tracks revenue and deal trends across quarters, showing business growth and patterns.

2. Data Requirements

The dashboard uses the following dataset columns:

- Sales Agent
- Deal Stage
- Product
- Engage Date
- Close Date
- Revenue
- Account Name
- Region
- Sector
- Target

3. Filters / Slicers

The dashboard includes interactive slicers for:

- Deal Stage
- Product
- Sales Agent
- Region
- Quarter

• Engage Date / Close Date

4. Visuals / Charts

Each section of the dashboard uses the following visualizations:

• CRM Sales Opportunity Overview:
 o KPI Cards – Total Revenue, Total Deals, Deals Won, Deals Lost, Win Rate %, Average Close Days
 o Funnel Chart – Deal conversion through different stages (Engaged → Proposal → Won → Lost)
 o Pie/Donut Chart – Revenue by Product or Region
 o Line Chart – Revenue Trend Over Time

• Sales Performance Analysis:
 o Bar Chart – Revenue by Sales Agent
 o Column Chart – Product-wise Sales
 o KPI Comparison – Top vs Bottom Performing Agents
 o Table – Detailed deal performance by agent and product

• Quarterly Overview / Trends:
 o Line/Area Chart – Quarterly Revenue and Win Rate
 o Ribbon Chart – Won vs Lost deals by quarter
 o Bar Chart – Quarterly Revenue Comparison

5. Interactivity

The Power BI dashboard provides the following interactive features:

• Cross-filtering between visuals for dynamic insights.
• Drill-down from Region → Sales Agent → Product.
• Date hierarchy navigation (Year → Quarter → Month).
• Tooltip details on hover for all visuals.
• Navigation buttons between dashboard pages.

6. Calculations / Measures

Key DAX measures used in Power BI include:

• Total Revenue = SUM('CRM_Data'[Revenue])
• Total Deals = COUNT('CRM_Data'[Deal ID])
• Deals Won = CALCULATE(COUNT('CRM_Data'[Deal ID]), 'CRM_Data'[Deal Stage] = "Won")
• Deals Lost = CALCULATE(COUNT('CRM_Data'[Deal ID]), 'CRM_Data'[Deal Stage] = "Lost")
• Win Rate % = DIVIDE([Deals Won], [Total Deals])

• Average Close Days = AVERAGEX(FILTER('CRM_Data', 'CRM_Data'[Deal Stage] = "Won"), DATEDIFF('CRM_Data'[Engage Date], 'CRM_Data'[Close Date], DAY))
• Quarterly Revenue = CALCULATE(SUM('CRM_Data'[Revenue]), DATESQTD('CRM_Data'[Close Date]))

7. Export / Reporting Needs

• Export dashboard visuals to PDF for review and presentation.
• Scheduled data refresh (weekly).
• Publish dashboard to Power BI Service for stakeholder access.
• Enable role-based access for Sales and Management Teams.

8. Notes / Special Instructions

• Ensure Engage Date and Close Date formats are consistent before import.
• Validate all Deal Stage categories for accuracy.
• Maintain consistent naming conventions for Sales Agent and Product columns.
• Dashboard designed for Power BI Desktop and Service with responsive layout.