Business Requirements Document (BRD)

Project Name: CRM Sales Opportunity Dashboard

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Date: 27/10/2025

Project Sponsor / Business Owner: Sales & Marketing Team

Version: 1.0

1. Business Objective

The objective of this project is to:

1. Analyze CRM sales data to understand opportunity pipeline and performance.
2. Measure win rate %, total revenue, and deal conversion efficiency.
3. Identify top-performing sales agents, products, and regions.
4. Support management with data-driven insights for improving sales strategy.

2. Project Scope

In Scope:
- Create three insight pages in Power BI:

  1. CRM Sales Opportunity Overview – Summarizes KPIs and overall pipeline performance.
  2. Sales Performance Analysis – Displays agent and product-level performance metrics.
  3. Quarterly Overview / Trends – Shows quarterly deal and revenue trends over time.

- Integrate CRM dataset including: Opportunity details, sales agents, products, and dates.
- Implement DAX measures for KPIs such as Total Revenue, Win Rate %, and Average Close Days.
- Add slicers for filtering by Product, Region, Sales Agent, and Quarter.

Out of Scope:
- Predictive forecasting or machine learning analysis.
- Integration with external CRM APIs or real-time streaming data.
- Automated email notifications or workflow automation.

3. Stakeholders

Role	Name / Department	Responsibility
Project Sponsor	Sales Head	Approve requirements, review reports
Business Analyst	Shinfa P	Gather requirements, create BRD
BI Developer	Shinfa P / Team	Build dashboards, create measures
End Users	Sales & Marketing Team	Use dashboards for decision making
Data Owner	CRM / Data Team	Provide accurate and updated data

4. Requirements

Functional Requirements:

1. Display Total Revenue, Total Deals, Deals Won, Deals Lost, Win Rate %, and Average Close Days.
2. Show agent-wise and product-wise revenue and performance metrics.
3. Provide quarterly insights showing total opportunities, won deals, and lost deals.
4. Enable filtering by Product, Deal Stage, Sales Agent, and Quarter.
5. Include dynamic navigation buttons between dashboard pages.

Non-Functional Requirements:

- Dashboard should load within 5 seconds.
- User interface should be clean, modern, and interactive.
- Data refresh must occur automatically when updated in the CRM source.

5. Data Requirements

Table Name	Description	Rows
Opportunity Table	Opportunity-level data including revenue, stage, dates	9648
Product Table	Product information such as category, segment	20
Sales Agent Table	Agent details including region and target	30

Key Fields:

- Opportunity_ID

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

6. Dashboard / Insight Pages

Page Name	Purpose	Key Metrics / Questions	Visuals
CRM Sales Opportunity Overview	Summarize overall performance	Total revenue, win rate, deal stages	KPI Cards, Funnel, Pie, Line Chart
Sales Performance Analysis	Analyze agent and product performance	Revenue by agent/product, win rate	Bar Chart, Column Chart, Table
Quarterly Overview / Trends	Show performance over time	Quarterly deals won/lost, revenue trend	Ribbon Chart, Bar Chart, Line Chart

7. Assumptions & Constraints

- Data is accurate, cleaned, and validated before loading into Power BI.
- Dashboard will be viewed in Power BI Desktop and Power BI Service.
- User access permissions will be handled within Power BI workspace.
- Row mismatches handled through relationships and data modeling.

8. Glossary of Terms

Win Rate %: Percentage of deals won out of total opportunities.
Average Close Days: Average number of days taken to close a deal.
Deal Stage: The stage of the sales process (Engaged, Proposal, Negotiation, Won, Lost).
Quarter: Time-based division (Q1, Q2, Q3, Q4) used for trend analysis.
Revenue: Total value of deals marked as 'Won'.

9. Approval

Name	Role	Signature	Date
Project Sponsor			
BI Developer			
Business Analyst			