Our product’s goal is to scope out business growth and points of failure through a system of meticulous visualisation and analysis of the historical and real time data that we have about our customers and products. We have divided the analysis into 3 segments however holistically speaking, they function the same way.

We have divided the analysis to deep dive into the following 3 things:

1. **Complete Overview of Product, Customer and Sales:**

**Objective**: To provide clear and insightful visual representations of how customers are distributed across various dimensions such as products, geographic locations, gender, and age groups.

**Solution**: We will develop a series of visual tools that allow stakeholders to easily understand customer demographics and behaviors. This includes dynamic maps and charts that offer interactive and drill-down capabilities to explore customer data comprehensively. These tools will enable businesses to identify trends, spot anomalies, and make informed decisions based on customer distribution patterns.

1. **Product Analytics**:

**Objective**: To conduct an in-depth analysis of product performance across different regions and customer segments, identifying key trends and growth opportunities.

**Solution**: Our platform will provide advanced analytical capabilities to dissect product performance. This involves creating visualizations that correlate product sales and customer engagement with various demographic and geographic factors. By analyzing these correlations, businesses can understand which products are performing well in specific regions and among certain customer groups, and adapt their strategies accordingly. The system will support filtering and segmenting data to uncover deeper insights and optimize product offerings.

1. **Customer Navigation and Filtering**:

**Objective**: To enhance the ability of users to navigate through customer data efficiently and apply filters based on multiple attributes for targeted analysis.

**Solution**: We will implement intuitive navigation and filtering options within the platform, allowing users to quickly access the specific customer data they need. This includes search functionalities and filters based on attributes such as source of wealth, region, and occupation. The goal is to provide a seamless user experience where users can customize their view of the data, perform complex queries, and retrieve actionable insights with minimal effort. This will improve data accessibility and support precise, data-driven decision-making processes.

**NFRs:**

1. **Entitlement and Access Control**:

**Requirement**: Implement a role-based access control system with the following entitlements:

* **Internal Financial Advisors**: Can view analytics and exact details for customers assigned to them.
* **Independent Financial Advisors**: Can only view details of their own customers, without access to internal analytics.
* **Admin**: Has full visibility overall customer data and analytics.