

Client Brief for Pari Holdings Dashboard Project

Client: Pari Holdings

Project Name: Seasonal Trends and Promotional Effectiveness Dashboard

Project Manager: Nosipho Mashile

Date: May 23, 2024

1. Project Overview

Pari Holdings seeks to gain deeper insights into their sales performance by analyzing seasonal trends and the effectiveness of various promotional activities. This project aims to create a comprehensive Power BI dashboard that will enable Pari Holdings to make data-driven decisions to optimize their inventory, marketing strategies, and overall business performance.

2. Project Objectives

- **Seasonal Sales Analysis:** Identify peak sales periods and seasonal fluctuations to optimize inventory levels and staffing.
- **Promotional Effectiveness:** Evaluate the impact of different promotional activities on sales to enhance marketing strategies.
- **Customer Behavior Insights:** Understand customer purchasing patterns across different demographics and seasons.
- **Operational Efficiency:** Improve operational planning by analyzing sales intensity by day and time.

3. Key Deliverables

1. **Power BI Dashboard:** An interactive dashboard with the following components:
 - Line chart showing total sales over time with color-coded seasons.
 - Stacked area chart displaying sales by product category.
 - Bar chart comparing seasonal sales across years.
 - Line chart with markers for promotional periods.
 - Bar chart for promotional vs. non-promotional sales.
 - Scatter plot for promotional effectiveness.
 - Heatmap showing sales intensity by day and time.
 - Pie chart displaying the proportion of promotional sales.
2. **Data Preparation:** Cleaning and transforming the sales data, including the creation of necessary calculated columns and measures.
3. **Insightful Analysis:** Providing actionable insights based on the visualizations to drive business strategies.

4. Scope of Work

- **Data Collection and Preparation:** Gather and clean historical sales data, promotional event data, and customer demographics.
- **Dashboard Development:** Design and develop the Power BI dashboard with interactive and user-friendly visualizations.
- **Analysis and Reporting:** Analyze the data to extract meaningful insights and provide a detailed report with recommendations.
- **Training and Support:** Provide training sessions for the team on how to use and interpret the dashboard, along with ongoing support.

5. Project Timeline

Phase	Tasks	Duration
Project Initiation	Kick-off meeting, requirement gathering	1 week
Data Preparation	Data collection, cleaning, and transformation	2 weeks
Dashboard Development	Design and development of the Power BI dashboard	3 weeks
Analysis and Reporting	Data analysis, report preparation, and presentation	2 weeks
Training and Support	Training sessions and ongoing support	1 week

6. Budget

The total estimated budget for this project is \$200000. This includes costs for data preparation, dashboard development, analysis and reporting, and training and support.

7. Success Criteria

- **Accuracy:** The dashboard accurately represents sales data and provides reliable insights.
- **Usability:** The dashboard is user-friendly and easy to navigate for all stakeholders.
- **Actionable Insights:** The analysis provides clear, actionable insights that can drive strategic decisions.
- **Stakeholder Satisfaction:** Positive feedback from stakeholders on the usefulness and effectiveness of the dashboard.

8. Stakeholders

- **Project Sponsor:** [Thabo Mokoena, Chief Marketing Officer]
- **Senior Management:** [Hannah Park, Head of Insights and Analytics]
- **Marketing Team:** [James Shore, Patrick Jane, and Selina Tan, Marketing Executives]
- **Sales Team:** [Pamela Johnson, Sales Executive]
- **Inventory Managers:** [Helen Joseph, Operations Executive]

9. Communication Plan

Regular updates and meetings will be scheduled to ensure all stakeholders are informed of the project progress. The communication plan includes:

- **Weekly Status Meetings:** To discuss progress, issues, and next steps.
 - **Monthly Reports:** Detailed reports on project status, findings, and insights.
 - **Final Presentation:** A comprehensive presentation of the dashboard and key insights at the end of the project.
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Approval:

I approve the outlined project plan and authorize the team to proceed.

Signature: Thapelo Mokoena, Client Executive, Pari Holdings