

PowerLytix Dashboard - Version 2 Roadmap

Overview

Your PowerLytix Private KPI Dashboard (Version 1) is complete and includes comprehensive functionality for tracking 36 key performance indicators across marketing, call center, and sales operations. This document outlines planned enhancements for **Version 2** based on client feedback and industry best practices.

Version 1 - Current Features (Delivered)

Core Dashboard Functionality

- **36 KPIs** organized into 4 categories (Top-Line Rollup, Marketing, Call Center, Sales)
 - **Animated visualizations** with count-up effects and sparkline trends
 - **Date filtering** with preset ranges (7d/30d/90d) and custom date picker
 - **Comparison mode** showing period-over-period deltas with visual indicators
 - **Goal tracking** with 4 configurable goals and animated progress bars
 - **Alert configuration** UI for setting KPI thresholds
 - **Export functionality** including PDF reports and Excel spreadsheets
 - **Responsive design** optimized for desktop, tablet, and mobile
 - **Secure authentication** with Supabase backend
 - **API key management** interface for integrations
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Version 2 - Proposed Enhancements

Priority 1: HIGH PRIORITY (Most Requested)

1. Automated Alert Notifications

Current State: Alert thresholds can be configured in the UI

Enhancement: - Email notifications when KPIs exceed thresholds - SMS alerts for critical metrics - Configurable notification frequency (real-time, daily digest, weekly summary) - Alert escalation rules (notify manager if threshold exceeded for X days) - Alert history log with timestamps and values

Business Value: Proactive monitoring without manual dashboard checking

2. Custom Comparison Date Ranges

Current State: Automatic period-over-period comparison (e.g., last 30 days vs prior 30 days)

Enhancement: - Manual date range selection for both comparison periods - Compare any two custom periods (e.g., "January 2024 vs January 2025") - Quarterly and year-over-year comparison presets - Save favorite comparison configurations - Compare multiple periods simultaneously (3-way or 4-way comparison)

Business Value: Flexible analysis for seasonal trends, campaign performance, and strategic planning

3. Predictive Forecasting

Enhancement: - AI-powered forecasting for all 36 KPIs - Predict performance 7, 30, or 90 days into the future - Confidence intervals showing prediction accuracy - "What-if" scenario modeling (e.g., "What if marketing spend increases 20%?") - Trend analysis with automatic insights - Goal projection (will you hit your targets based on current trajectory?)

Business Value: Data-driven planning and early identification of potential issues

4. Scheduled Automated Reports

Current State: Manual PDF and Excel export

Enhancement: - Automated report generation on schedule (daily, weekly, monthly) - Email distribution to stakeholders - Custom report templates (choose which KPIs to include) - Executive summary with AI-generated insights - Branded PDF reports with company logo - Report archive and history

Business Value: Consistent communication without manual effort

Priority 2: MEDIUM PRIORITY (Enhanced User Experience)

5. Advanced Comparison Visualizations

Enhancements: - **Overlay Charts:** View current vs previous period on same chart with color-coded lines - **Side-by-Side View:** Display KPI cards for both periods simultaneously - **Waterfall Charts:** Show contribution of each metric to overall change - **Heat Maps:** Visualize performance across multiple dimensions

Business Value: Deeper visual insights into performance trends

6. Dashboard Themes & Customization

Enhancements: - Dark mode toggle for reduced eye strain - Custom color schemes matching your brand - Drag-and-drop KPI card arrangement - "Favorite" or "Pin" important KPIs to top - Custom dashboard views per user role - Widget sizing options (compact, standard, detailed)

Business Value: Personalized experience tailored to individual workflows

7. Enhanced Goal Management

Current State: 4 goal cards with progress tracking

Enhancements: - Unlimited custom goals - Multi-tier goals (stretch, target, minimum) - Goal dependencies (Goal B depends on Goal A) - Historical goal tracking (did we hit last quarter's goals?) - Goal templates for quick setup - Team vs individual goal tracking

Business Value: Comprehensive performance management aligned with business objectives

8. Direct Platform Integrations

Current State: API key management UI for manual data entry

Enhancements: - **Native integrations** with Google Ads, Facebook Ads, LinkedIn Ads - **CRM connections** (Salesforce, HubSpot, Pipedrive) - **Call tracking** integrations (CallRail, CallTrackingMetrics) - **Automated data sync** (real-time or scheduled) - **Webhook support** for pushing data from external systems - **Multi-source data blending** (combine data from multiple platforms)

Business Value: Eliminate manual data entry and reduce errors

Priority 3: ADVANCED FEATURES (Future Consideration)

9. Anomaly Detection & Insights

Enhancements: - AI-powered anomaly detection (automatic flagging of unusual patterns) - Root cause analysis suggestions - Correlation analysis (which KPIs influence each other?) - Natural language insights ("Your Cost Per Lead increased 15% due to...") - Recommended actions based on performance trends

Business Value: Proactive problem identification with actionable recommendations

10. Team Collaboration Features

Enhancements: - Role-based access control (Admin, Manager, Viewer) - Comments and annotations on KPI cards - Share specific dashboard views with secure links - Activity feed showing team member actions - @mention notifications for collaboration - Audit logs tracking data access and exports

Business Value: Secure multi-user environment with accountability

11. Mobile Native Applications

Current State: Responsive web design works on mobile browsers

Enhancements: - Native iOS app (iPhone/iPad) - Native Android app - Push notifications for alerts - Offline mode with cached data - Biometric authentication (Face ID, fingerprint) - Mobile-optimized dashboards

Business Value: On-the-go access with native mobile experience

12. Advanced Analytics Suite

Enhancements: - **Custom calculated metrics** (create your own KPI formulas) - **Cohort analysis** (track customer segments over time) - **Attribution modeling** (which marketing channels drive results?) - **Statistical significance testing** - **Data export API** for custom analysis tools - **SQL query builder** for power users

Business Value: Deep analysis capabilities for data-driven teams

13. Multi-Tenant Architecture

Enhancements: - Separate dashboard instances for different clients - White-label branding per client - Consolidated view across all clients (agency view) - Client-specific user management - Cross-client benchmarking and reporting - Billing and usage tracking per client

Business Value: Scale to manage multiple client dashboards from one platform

Estimated Development Timeline

Phase 2A (2-3 months)

- Automated Alert Notifications
- Custom Comparison Date Ranges
- Scheduled Automated Reports
- Dashboard Themes (Dark Mode)

Phase 2B (2-3 months)

- Predictive Forecasting
- Advanced Comparison Visualizations
- Direct Platform Integrations (Google Ads, Facebook Ads)
- Enhanced Goal Management

Phase 2C (3-4 months)

- Anomaly Detection & AI Insights
- Team Collaboration Features
- Mobile Native Applications
- Advanced Analytics Suite

Phase 2D (Ongoing)

- Multi-Tenant Architecture
- Additional platform integrations
- Custom feature requests

Next Steps

1. **Review this roadmap** and identify which features are most valuable for your business
 2. **Prioritize features** based on your team's needs and pain points
 3. **Schedule a planning call** to discuss implementation timeline and investment
 4. **Define success metrics** for Version 2 features
 5. **Establish feedback loop** for iterative improvements
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Questions to Consider

- Which features would have the biggest impact on your team's productivity?
 - Are there any critical gaps in the current dashboard that need immediate attention?
 - How many users will need access to the system?
 - Do you need multi-client management capabilities?
 - What integrations are most important for your workflow?
 - What is your preferred timeline for rolling out Version 2 features?
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Contact

Ready to discuss Version 2? Let's schedule a call to review your priorities and create a customized implementation plan.

Document Version: 1.0

Last Updated: January 2024

Current Dashboard Version: 1.0 (Production)