Planning

Meeting Notes

Objectives:
- Increase sales of related products by 10% over the next six months by bundling items that are most often purchased together.
- Increase sales of top-selling items by 15% by ranking the top 100 items by sales volume in the past 30 days and prioritize marketing those items.
- Reduce the number of out-of-stock items by 10% by connecting POS (point-of-sale) data with warehouse data to identify when inventory is running low.
- Increase brand awareness by 10% in the five countries with the most visitors as identified by website traffic.

Business Question	Objective	Data Needed
Which products are most often purchased together?	Increase sales of related products by 10% over the next six months by bundling items most often purchased together.	Items purchased by customers during the same transaction over the last six months
Which products are selling the most?	Increase sales of top-selling items by 15% by ranking the top 100 items by sales volume in the past 30 days and prioritize marketing those items.	100 most purchased items over the last 30 days
How can we use point of sale data to better manage inventory?	Reduce the number of out-of-stock items by 10% by connecting POS (point-of-sale) data with warehouse data to identify when inventory is running low.	POS data and warehouse data for the last 24 hours
How can we determine which countries have the most visitors to our website?	Increase brand awareness by 10% in the five countries with the most visitors as identified by website traffic.	Website traffic by country over the last six months

Capture Data

Meeting Notes

Data Sources

- The POS dataset is used by marketing and merchandising to track sales.
- Web analytics data is used by both marketing and merchandising to track traffic to the site and monitor the success of products and campaigns.
- The POS dataset stores data on every item ordered by a customer in a single transaction.
- The web analytics data tracks the number of visitors by page and the visitors' location.

Gaps

- Since the POS data is not connected to the warehouse data, it's hard to know when we need to restock.

Data Transformation

- The POS data collects sales in the local currency, but it is difficult to compare sales from different countries.
- The marketing team would like the web analytics results filtered to focus on specific countries where they currently have ads running.

Recommendations

The POS data is needed to track top sales and determine products that are sold together.

The warehouse database should be included to allow for better tracking of products and inventory control.

To facilitate easier sales comparisons across regions, convert all sales data from local currencies to USD.

Manage, Analyze, Archive, and Destroy Data

Meeting Notes

Manage

- The POS information collects credit card information.
- The current policy on who should have access to PII (personally identifiable information), like credit card information, is unclear.

Analyze

- The marketing team relies on a web traffic report that lists the total amount of traffic for the top five countries. This information should be updated daily.
- The merchandising team would like a clear and insightful visualization to understand how customers purchase products together.

Archive and Destroy

- We shouldn't hold on to PII forever. We need a plan for when to destroy the data.
- While most web analytics data is not actively referenced beyond six months, the marketing team occasionally requires historical data up to five years for specific campaigns or trends analysis.

Recommendations

Define clear timelines for data retention and destruction based on legal requirements and business needs.

Clearly define PII access roles and responsibilities. This precaution will reduce exposure to only those with a clear business need.

Archive web analytics data after six months. Retain key metrics for five years before destroying, in accordance with an established policy.