Project Requirements Document: [Fictional Project]

## **BI Analyst:** Zohaib Hashmi

## **Client/Sponsor:** Emma Santiage, Hiring Manager

## **Purpose:** (Briefly describe why the project is happening and why the company should invest resources in it.)

## The purpose of this project is to create a dashboard that provides insights into repeat customer support calls. It aims to help leaders understand the effectiveness of the customer support team in resolving customer issues on the first attempt and to identify the reasons behind repeat calls to improve the overall customer experience.

## **Key dependencies:** (Detail the major elements of this project. Include the team, primary contacts, and expected deliverables.)

## Key dependencies for this project include access to all datasets by stakeholders, including Emma Santiago and Keith Portone, to explore the steps taken in data analysis.

## **Stakeholder requirements:** (List the established stakeholder requirements, based on the Stakeholder Requirements Document. Prioritize the requirements as: R - required, D - desired, or N - nice to have.)

## R: The BI tool must provide insights into how often customers contact customer support again after their first inquiry.

## R: It should allow stakeholders to explore the types of customer issues that generate repeat calls.

## R: The tool should enable stakeholders to analyze repeat caller trends in three different market cities.

## R: Charts and tables must be designed to view trends by week, month, quarter, and year.

## D: The dashboard should have accessible features, including large print and text-to-speech alternatives, as per Minna's request.

## **Success criteria:** (Clarify what success looks like for this project. Include explicit statements about how to measure success. Use SMART criteria.)

## Reduced call volume, indicating increased customer satisfaction and operational optimization.

## Providing stakeholders with insights about repeat caller volumes in different markets and the types of problems they represent.

## Ability to answer the questions:

## How often does the customer service team receive repeat calls from customers?

## What problem types generate the most repeat calls?

## Which market city's customer service team receives the most repeat calls?

## **User journeys:** (Document the current user experience and the ideal future experience.)

## Current User Experience: Currently, stakeholders have limited access to data, making it challenging to track repeat customer support calls effectively. They rely on manual data analysis, which is time-consuming and less insightful.

## Ideal Future Experience: In the ideal future experience, stakeholders will have access to a user-friendly dashboard that provides real-time insights into repeat customer support calls. They will be able to navigate through interactive charts and tables to identify trends easily.

## **Assumptions:** (Explicitly and clearly state any assumptions you are making.)

## Assumption 1: The provided dataset is accurate, complete, and representative of actual customer support interactions.

## Assumption 2: Stakeholders will have access to the necessary hardware and software to use the dashboard effectively.

## Assumption 3: Stakeholders have a basic understanding of data analysis and can interpret the provided insights.

## **Compliance and privacy:** (Include compliance, privacy, or legal dimensions to consider.)

## The project will adhere to all relevant data privacy and compliance regulations, ensuring that customer data is anonymized and protected in accordance with legal requirements.

## **Accessibility:** (List key considerations for creating accessible reports for all users.)

## The dashboard will be designed with accessibility in mind, including features such as large text, high contrast visuals, and text-to-speech functionality to ensure that it can be used by all stakeholders, including those with disabilities.

**Roll-out plan:** (Detail the expected scope, priorities and timeline.)

* **Scope:** The scope of the project includes the development of the dashboard, data integration, and ensuring its accessibility.
* **Priorities:** The highest priority is to create a functional dashboard that meets the specified requirements. Accessibility features will also be a top priority.
* **Timeline:** The project is expected to take two weeks to complete. Specific milestones and measurement points will be established to assess the dashboard's performance.