

Strategy Document: [Project Name]

Sign-off matrix:

Name	Team / Role	Date

Proposer: [Name and title]

- Emma Santiago, Hiring Manager
- Keith Portone, Project Manager
- Minna Rah, Lead BI Analyst

Status: [Draft] > Under review > Implemented | Not implemented (Highlight current status)

Primary dataset:

- Waiting
- market_1, market_2, market_3

Secondary dataset:

User Profiles [Who is the intended audience for this dashboard? How do you expect them to use this dashboard?]

- Ian Ortega, BI Analyst
- Sylvie Essa, BI Analyst

Dashboard Functionality

Dashboard Feature	Your Request
Reference dashboard (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.)	Build a new dashboard to explore the number of repeat callers and their problem types in three different market cities.
Access (How should access to the dashboard be	Access will be provided as read-only to the user profiles listed in this document.

limited? Who needs to have access?)	
Scope (What data should be included or excluded in this dashboard?)	<p>The data also lists five problem types:</p> <ul style="list-style-type: none"> • Type_1 is account management • Type_2 is technician troubleshooting • Type_3 is scheduling • Type_4 is construction • Type_5 is internet and wifi • Number of calls • Number of repeat calls after first contact • Call type • Market city • Date
Date filters and granularity (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a “granularity” drop-down? If so, what granularity should be selected by default?)	<p>by week, month, quarter, and year.</p> <p>Granularity: Any chart with detailed metrics should have the ability to click on that metric to view specific information.</p>

Metrics and Charts

Create a table for each chart that you’d like to include in the dashboard. If you’d like to break the dashboard under different headers, feel free to list those here as well.

Chart 1

Chart Feature	Your Request
Chart title	Repeat calls by first date
Chart type (What type of chart needs to be created?)	<ul style="list-style-type: none"> • A chart or table measuring repeat

	calls by their first contact date
Dimension(s) (What dimensions does this chart need to include?)	Day of initial call, subsequent repeat calls
Metric(s) (What metrics are relevant to this chart?)	<ul style="list-style-type: none"> • Number of calls • Number of repeat calls after 1st inquiry

Chart 2

Chart Feature	Your Request
Chart title	Market and Problem Type of First Repeat Calls
Chart type (What type of chart needs to be created?)	<ul style="list-style-type: none"> • A chart or table exploring repeat calls by market and problem type
Dimension(s) (What dimensions does this chart need to include?)	Call type, market, contact_n_1
Metric(s) (What metrics are relevant to this chart?)	<p>Call types</p> <p>3 Market place cities</p>

Chart 3

Chart Feature	Your Request
Chart title	Calls by Market and Type

Chart type (What type of chart needs to be created?)	<ul style="list-style-type: none"> LINE Charts showcasing repeat calls by week, month, and quarter
Dimension(s) (What dimensions does this chart need to include?)	Market, call type, day
Metric(s) (What metrics are relevant to this chart?)	Date and contact

Chart 4

Chart Feature	Your Request
Chart title	Repeats by Week, Month, and Quarter
Chart type [What type of chart needs to be created? This could include any chart type, including a line chart (timeseries), bar chart, or table.]	Bar
Dimension(s) [What dimensions does this chart need to include?]	Date, contact
Metric(s) [What metrics are relevant to this chart?]	Date

