Client Facing Requirements gathering

Goal: increase sales of products for their biggest performing customers to maximize that trend. Also, among everyone and all inventory identify worst selling inventory so they can get rid of that

Who are the Highest performing customers?

* Net sales and gross profit margin (consider both) over last 6 months
  + Also include total sales and returns just to see visually
  + And show YoY and QoQ
* In last 6 months what were the total sales, net sales (this one is more important), and gross profit margin
* In terms of #s, the top 10 customers BUT also look at the % of total sales those customers make up (e.g., these customers make up 70% of all sales)
  + Slice it by sales region
  + Top ten will be the top % of sales

Return ranked order list/table for the client so they can decide how far down they want to go (e.g., maybe want to look at top 15)

Which products are the highest performing products (making the most money on selling/best profit margin) and which are selling the most quantity

Highest performing products for just the top 10 customers:

* Product category and product is important here
* Look for the worst performing products of all customers so they can get rid of them quickly
* Gross profit margin on it
* Last time the product was sold
* Identify items that have a high cost to be sitting around (value of that inventory that is not selling compared to inventory that is selling well)
* Value of what is on hand (% of total cost that is the poor performing product)

Future questions: what is it that makes something red or green on the report? How do we know if something is good/bad KPI – this will go in the Reporting Document

See whether our efforts in targeting to these customers is working or not (QoQ and YoY) – we will not have actual marketing effort and follow-up data, but we would want to say we could report QoQ and YoY performance of those top 10

Set up model in such a way that the Sales Region could be expanded on in the future because they have interest in expanding worldwide.

Things to investigate:

* Can we include/exclude high discount purchasers?

4-6 visuals/page not including cards at top (aka the quick win #s at the top)

16x9 default size in power BI

We have 3 areas: sales trends, highest performing products, and lowest performing products – so this could be 3 different pages in the report

Normally one page is 20-25 hours, but we only have 50 hours to work on this project – think about this for the scoping.

Risk to a successful project outcome:

* Not sure if we can report on a salesperson number
* A little wishy washy on what a high performing customer is (maybe her boss will come back and say that’s not how I define high performing customer)