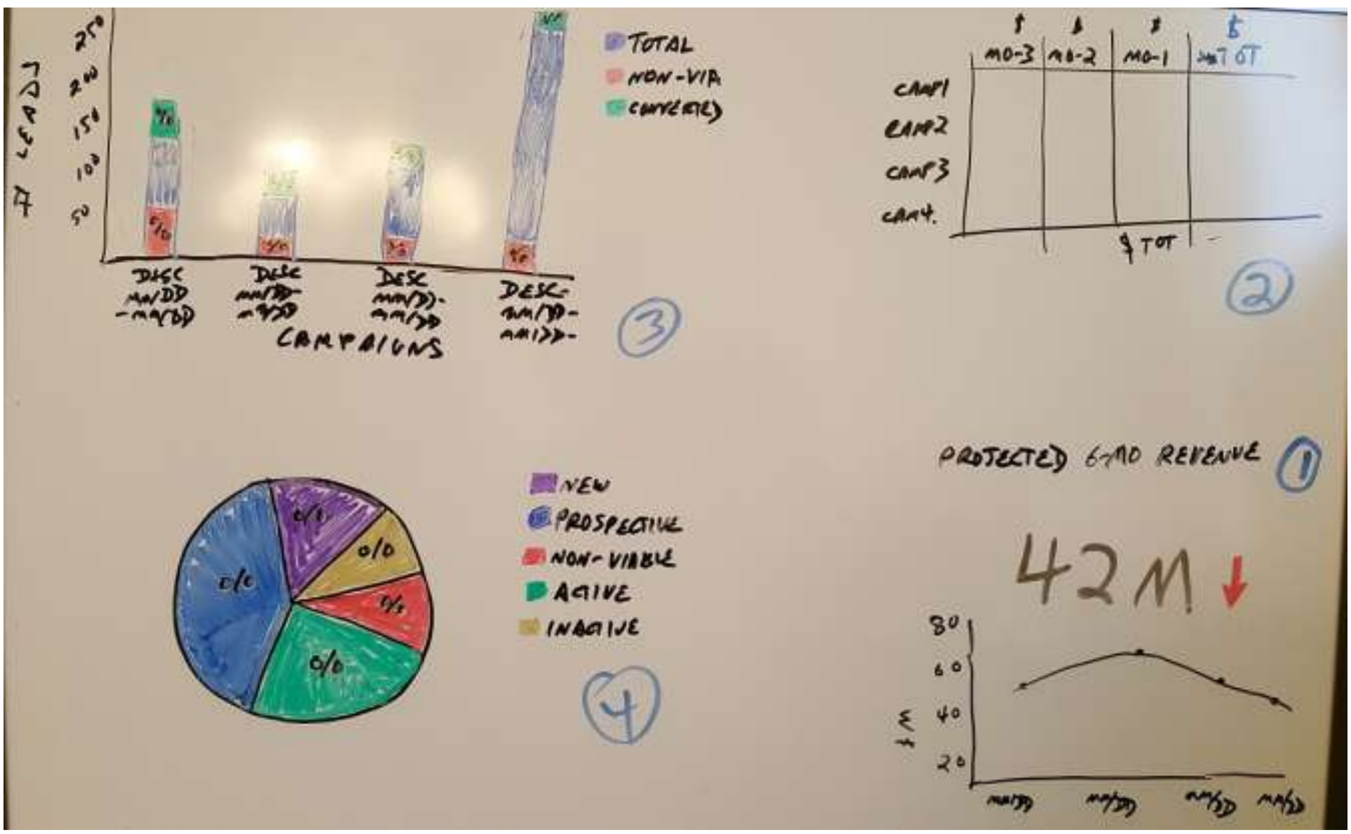
Descriptive Use Case

Item	Detail
Orig. ID(s)	1, 4, 5, 13
Dashboard Name	Sales Prospects
Dashboard Description	Depicts known customer base, leads and revenue generated by marketing campaigns, and projects expected revenue from prospective, active, and inactive customers.
Scenario Narrative	Users will access this dashboard in order to monitor effectiveness of marketing and sales lead pipelines, and ensure that projected revenue is consistent with the company's goals.
Key Assumptions	Appropriate sources for historical data must be established via warehousing and ETL design, particularly for backend requirements 6, 8, and 10. In addition, time series logic must be created for predictive analytics.
Actors	Primary users: • VP of sales and regional sales managers • Manager of Marketing and key marketing staff Secondary users: • Executive leadership • Accounting staff (upon request) • Supporting IT staff, for support purposes
Key Issues	Maureen Magnotta, Marketing Manager, has emphasized that it is important to track effectiveness of each campaign in order to capture ROI. Meanwhile Joe Healy, VP Sales, wishes to understand the value of existing leads and likelihood of conversion to sales.
Business Decisions	From a marketing perspective, how can future campaigns leverage the successful characteristics of prior campaigns? From a sales perspective, are our current marketing and sales processes sufficient to meet strategic revenue growth, or are investigative actions called for in order to identify improvements?
Use Case Description	All authorized users will access the dashboard from within the company intranet using desktop, tablet, or mobile devices. Sales personnel will use the dashboard routinely since executive leadership is calling for close monitoring of marketing and sales efforts in order to maintain and grow company revenue in today's economic conditions. Goals are to ensure that current marketing and sales processes are sufficient to maintain revenue goals. Marketing personnel will use the dashboard periodically as part of the iterative process of campaign evaluation and design. Goals are to review the progressive results of past campaigns in order to identify which campaigns yielded the best results, so that characteristics of the most successful campaigns can be applied to the design of upcoming ones.

Item	Detail
History To Be Shown	To-date results of marketing campaigns in the past six months, current breakdown of customer status, and revenue projections for the next six months, refreshed on a weekly basis.
Other Design Comments	Refine overall look and feel for max impact by applying visual design and layout best practices such as the rule of thirds & fifths. Employ a fluid layout structure that supports landscape four-quadrant design when viewed on desktops and tablets, and a vertical scrolling four-section design when viewed on small mobile devices. Display the data refresh date prominently. Reference *Sales Prospects Preliminary Mockup* for rough visual example. Blue numbers indicate priority of each section.



Sales Prospects Preliminary Mockup

Visualization: Projected Revenue

Item	Detail
Title of Visualization	Projected Revenue
Type of Visualization	Line chart
Location of Visualization	Landscape mode: Top left quadrant Mobile mode: First vertical tile
Size of Visualization	25% of visual area
Metrics	Project total revenue in millions over the next six months based on time series model that includes customer needs, characteristics, and history.
Level of Detail	Display trend of projected six-month revenue for the last four cycles (weeks, months, or quarters).
Exceptions	Revenue projections older than selected level of detail.
Visual Alerts	Display a dynamic icon that indicates whether the Projected 6-Mo Revenue value supports or falls short of annual strategic target. Calculate this by comparing total actual revenue plus projected revenue from the current date to EOY.
Aggregations	Above the graph, display the total projected revenue in millions as of the dashboard refresh date. Precede the value with a label: "Projected 6-Mo Revenue"
Drill Downs	Selecting any part of the graph will launch a new browser window pointing to the fully-detailed revenue time series model, filtered to match the granularity and timeframe featured in the current view of the dashboard.
Cross-Component Interaction	N/A
External Filters	Allow user to choose from last four weeks, months, and quarters. Default to last four weeks.
Other Design Comments	None.

Tabular Section: Revenue by Campaign

Item	Detail
Title of Table	Revenue by Campaign
Location of Table	Landscape mode: Bottom right quadrant Mobile mode: second vertical tile
Size of Table	25% of visual area
Data to be Displayed	
Rows	Name and start/end date of each marketing campaign conducted in the past six months.
Columns	Monthly revenue incurred by each campaign for the past six months plus a calculated subtotal for each, and a grand total
Groups	None.
Calculations	Revenue subtotal per campaign: SUM of monthly revenue Total campaign revenue: SUM of campaign subtotals
Subtotals	See Calculations.
Cross-Component Interaction	When a filter is selected in this table, the Leads by Campaign chart will automatically refresh to use the same filter.
External Filters	Allow user to filter the list of campaigns by All, Customer Class, Target Industry, and Geographic region. Default to all.
Other Design Comments	Selecting any part of the table will launch a new browser window pointing to a fully-detailed campaign data extract, filtered to match the campaigns and timeframe featured in the current view of the dashboard.

Visualization: Leads by Campaign

Item	Detail
Title of Visualization	Leads by Campaign
Type of Visualization	Bar Chart
Location of Visualization	Landscape mode: Top right quadrant Mobile mode: Third vertical tile
Size of Visualization	25% of visual area
Metrics	For each marketing campaign conducted within the last six months: **Total Leads**: Number of CRM records where Campaign ID matches the target campaign. **Total Non-Viable**: Number of CRM records where Campaign ID matches the target campaign and Workflow Status = Disqualified. **% Non-Viable**: Number of CRM records where Campaign ID matches the target campaign and Workflow Status = Disqualified, divided by Total Leads, as a whole number. **Total Converted**: Number of CRM records where Campaign ID matches the target campaign and Workflow Status in (Placed Order, Received Order). **% Converted**: Number of CRM records where Campaign ID matches the target campaign and Workflow Status in (Placed Order, Received Order), divided by Total Leads, as a whole number.
Level of Detail	Reference metrics definitions.
Exceptions	Campaigns and resulting leads conducted more than six months ago.
Visual Alerts	For each campaign, show total, converted, and non-viable leads as a stacked bar chart. Include a legend. Label X axis as Campaigns with each campaign name and start/end dates as mm/dd. Label Y axis as # Leads in appropriate increments and range based on the data.
Aggregations	Break out number of converted and non-viable leads from each campaign's total generated leads.
Drill Downs	N/A
Cross-Component Interaction	When a filter is selected for this chart, the Revenue by Campaign table will automatically refresh to use the same filter.
External Filters	Allow user to filter the list of campaigns by All, Customer Class, Target Industry, and Geographic region. Default to all.
Other Design Comments	Colors used for Prospective, Active, and Non-Viable must be consistent with colors used in the Customer Breakdown pie chart. For accessibility purposes, when a legend label is selected by a pointing device, highlight the corresponding bar sections so that the user can identify them without relying on color. Also ensure that labels and bar sections are properly "tagged" for screen readers.

Visualization: Customer Breakdown

Item	Detail
Title of Visualization	Customer Breakdown
Type of Visualization	Pie Chart
Location of Visualization	Landscape mode: Bottom left quadrant Mobile mode: Fourth vertical tile
Size of Visualization	25% of visual area
Metrics	**Total Customers**: Count of records in central CRM tool. **% New Customers**: Number of CRM records where Workflow Status = Not Contacted, divided by Total Customers, as a whole number. **% Prospective Customers**: Number of CRM records where Workflow Status in (Introduced, Discussing Needs, Requested Quote, Received Quote), divided by Total Customers, as a whole number. **% Non-Viable Customers**: Number of CRM records where Workflow Status = Disqualified, divided by Total Customers, as a whole number. **% Active Customers**: Number of CRM records where Workflow Status in (Placed Order, Received Order) and Order Date >= Current Date minus 2 years, divided by Total Customers, as a whole number. **% Inactive Customers**: Number of CRM records where Workflow Status = Received Order and Order Date < Current Date minus 2 years, divided by Total Customers, as a whole number.
Level of Detail	Reference metrics definitions.
Exceptions	None.
Visual Alerts	Display data in pie chart format with percentage value superimposed in each slice. Differentiate slices with color choices that are effective for most users. Include a legend.
Aggregations	Reference metrics definitions.
Drill Downs	N/A
Cross-Component Interaction	N/A
External Filters	N/A
Other Design Comments	Colors used for Prospective, Active, and Non-Viable must be consistent with colors used in the Leads by Campaign bar chart. For accessibility purposes, when a legend label is selected by a pointing device, highlight the corresponding slice so that the user can identify it without relying on color. Also ensure that labels and slices are properly "tagged" for screen readers.