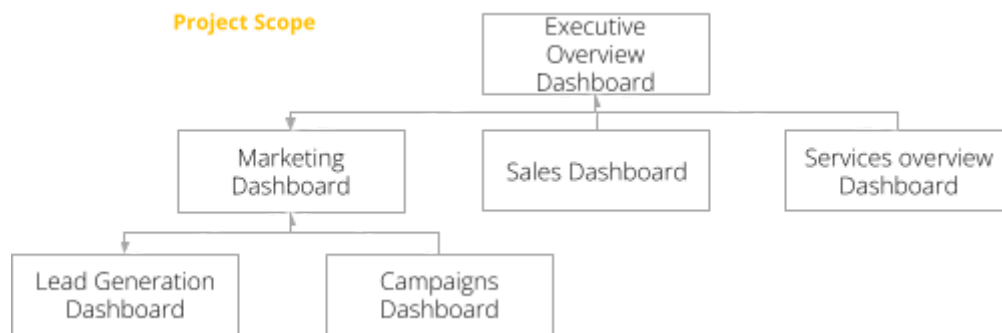


# Dashboard Planning Document

This is a template for planning the dashboard that we will develop during the Onboarding project (OBP). This will serve as a reference throughout the project and for future implementation.

To make the best out of the Onboarding Process, follow these guidelines

- Select one dashboard out of your dashboards hierarchy, and fill in the template below



- To fill in this template effectively, work with the business user who presented the business requirements.
- Examples of how to fill in the template are shown [in blue](#).

We recommend keeping this flow on future Sisense BI projects.

Let's get started...

MM/DD/YY

## 1. <Marketing Dashboard> Outline



### Dashboard Objective:

Describe a concrete goal this dashboard addresses

- Increase the number of qualified leads
- Reduce marketing cost



### Target Audience:

- Power Users: The business user who presented the business requirements for this dashboard and will provide feedback throughout the process  
VP Marketing
- Beta users: End users who will participate in UAT during the OBP  
John and Karen from the marketing team
- End users: Group/ individual users  
Marketing directors and team leaders
- Concurrent users: How many users will be accessing the dashboards concurrently?  
Up to 30 users



### Call to Action:

Describe the short-term actions that the end users should take based on this dashboard

Monitoring funnel performance to detect overall trends and to notify product managers if there are overall performance opportunities or threats.



Data Update frequency: Daily

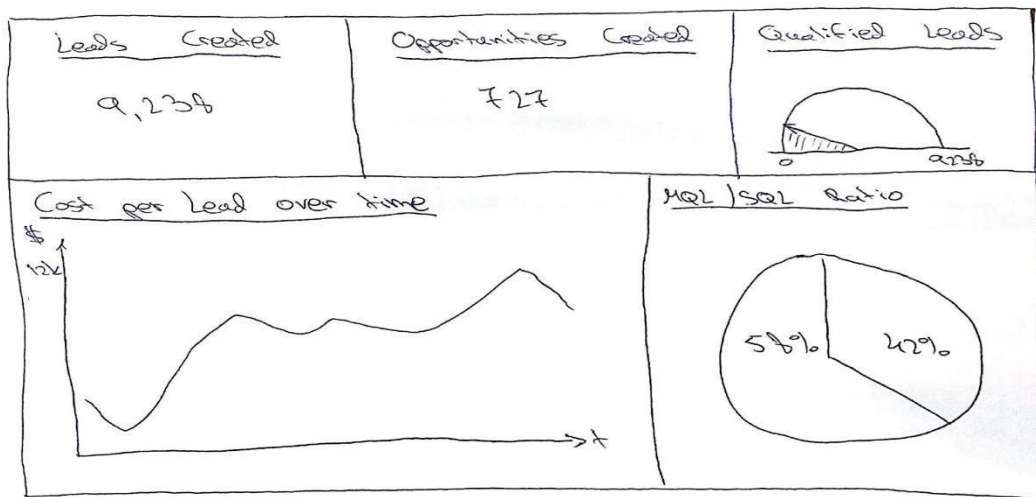


### Time line:

- UAT Date:
- Go live Date:

## 2. Dashboard Mockup

Design your widgets' visualization and the dashboard layout. Use the mockup to evaluate the design with the power user (use the following [link](#) to get references for dashboard examples).



## 3. KPI Architecture

Fill in your KPIs and associate them with the required data. Select the KPIs that you want to set up Pulse Alerts for.

KPI*	Measure		Dimension*		Comments
	Formula	Source table/view	Content	Source table/view	
# new leads	<i>Count(Leads.Lead_ID)</i>	<i>Leads</i>	<i>Client, Media, Date</i>	<i>Clients.Client_Name Channel.channel_name Leads.Lead_date</i>	<i>Filter out null values</i>
cost per lead	<i>Unknown</i>	<i>Leads</i>	<i>Client Media, Date</i>	<i>Clients.Client_Name Channel.channel_name Leads.Lead_date</i>	<i>Data Alert: Cost per lead for Facebook</i>

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\* Terminology:

- Key performance indicators - Business metrics which support decision making. KPIs are used to evaluate factors which are crucial to achieve the business objectives.
- Dimension - (AKA as Filters/ Slicers/ X axis/ Category) Business entities that categorize measures to enable users to answer business questions. Commonly used dimensions are people, products, place and time.

## 4. Data Requirements

Specify the required data to support your analysis.

History Depth: [2 Years](#)

#	Data Source type	Table Name	Description	Max # of records
1	<i>Salesforce</i>	<i>Leads</i>	<i>Main Lead table</i>	<i>~ 10M</i>
2	<i>Google Analytics</i>	<i>Ad_Performance_Report</i>	<i>Ad performance per date</i>	<i>~ 20M</i>
3				
4				

## 5. Security and Additional Constraints (Optional)

Describe the applicable data security restrictions and any other constraints.

- ...
- ...