[redacted]

Business Intelligence Exercise Guidelines

Background

Jeep hired [redacted] to build out a dashboard they can use to track two new forms they've added to their website: Form A, Schedule a Test Drive; and Form B, Find a Dealer. The stakeholders are a mix of executives and analysts, and the dashboard needs to cater to both parties. The executive team is focused on site traffic and form completions, while the analysts are interested in where the traffic and engagements come from and whether the forms are working correctly.

The data has been running for several months already, so there is a good backlog of data to build on. Although it's historical, should the data contain any anomalies, Jeep would like us to raise a flag, that way the analysts can work to prevent the issue from surfacing again. We've held several requirements gathering meetings already and have compiled the pertinent information into the document below, now we need you to build out the first draft of this dashboard!

Task

We've interviewed all relevant parties and filled out a Requirements Document with the pertinent information, now we need you to build out the draft of this dashboard and present it to Jeep to gather feedback. While the client understands that this will be the first draft and there may be some questions you need answered, they do expect a working dashboard to start exploring after this meeting. Please come prepared with the **dashboard** and a **live demonstration**, as well as any **questions** or **roadblocks** you encountered along the way. Expect to spend **15 minutes** on this initial feedback & demo process - this may include going into the working environment and exploring what you built. Assume that your **audience** is a mix of the **executive team** and **analysts**, and be prepared to speak to the functionality of the dashboard for both parties. **You can build the dashboard in whatever tool best highlights your capabilities**.

Notes

All data included is falsified; Jeep is not an [redacted] client. However, the web tracking data used is very similar to some of the work we do here, and the metrics we are measuring can be applied across many industries. Don't let the marketing nature of the data distract you from the questions being asked. If you have questions about the data or anything unclear in the Requirements Document, reach out via email and we will answer to the best of our abilities! Please do not consult with anyone outside [redacted] team for this project.

Dashboard Requirements Checklist

This document is meant to serve as a guide when conducting stakeholder interviews for a dashboard project.

Dashboard Purpose

Here we want to capture the audiences and their business questions. This is the most crucial part as it will drive what the dashboard will contain. **Really dig hard here to understand WHY they need the information and what they are going to do with it. Ask what action will be taken with the information after it is consumed.**

	Audience 1 Exec	Audience 2 Analyst
Business Question 1	How much traffic is hitting our site?	Which channels are best at generating traffic?
Primary KPIs	Total visitors	Total visitors by channel
Secondary KPIs	New visitors, existing visitors, delta between new & existing	Comparison against overall avg traffic, new visitors, existing visitors, delta between new & existing
Business Question 2	What % of visitors are completing the forms?	Are any browser versions breaking or underperforming?
Primary KPIs	Form complete rate	Total visitors, form complete rate
Secondary KPIs	Form start rate	Form start rate
Business Question 3		
Primary KPIs		
Secondary KPIs		
Important Time Periods	Month / Week	Week
Compare to	Prior period (month over month, week over week performance)	Prior period (week over week performance)

Dashboard Design

Is the dashboard meant to be exploratory or informative?

The executive level dashboard should be informative, we want to be able to grab screenshots to update our decks when we review with the executive team. We just need high level details in this dash.

The analyst dashboard should be both exploratory & informative. Our analysts will be monitoring the campaign performance weekly and making adjustments on spend. We need to know how the channels are performing so we can adjust how much we're putting into each channel. We also want to monitor our campaign by browser - we've had issues in the past with some browsers breaking our expected user experience, so we want to be able to check if we need to fix a specific browser issue.

If informative AND exploratory, how do you feel about a 'Summary' tab and then other 'Analysis' tab(s)?

We want one tab for the Executive view and one tab for the Analyst view

Are there logical groupings for the metrics/dimensions? Do you need to see every metric/dimension at once, or can we implement parameters for the users to choose which to see?

Metrics are already grouped how we want in the table above.
In the executive view, we should be able to see all the listed metrics at once. The analyst view, however, does not have to show everything all the time.

Miscellaneous

Will users need to export data from the dashboard? No

Any special feature requests?

- Interactivity
  - Nothing comes top of mind, but our analysts are used to highly interactive dashboards so feel free to add as much as you see fit
- Specific chart types
  - Use the chart that best answers the question(s)
- Color palettes/fonts
  - Primary color: #003300
  - Secondary colors: #000000 | #FFFFFF
  - Supplemental colors: #3F4A3C | #A2AF9F | #004679 | #2575AD
- Dashboard size
  - Whatever works best for you, however we do not want scrolling on the Executive view
- Formatting for printing/screenshotting
  - Executive tab should look good in a screenshot, so nothing too small on it
- Other
  - Use any tool that you think will best capture your skills & talent

What are the primary fields in the data set? We are looking for what you might want to measure and filter by.

Field Name	Dimension/Measure	Data Type	Filter?
Visitor Type	Dimension	String	No
Country	Dimension	String	Yes
Browser	Dimension	String	Yes
Channel	Dimension	String	Yes
Form Name	Dimension	String	No
Date	Dimension	Date	Yes
Unique Visitors	Measure	Integer	No
Form Starts	Measure	Integer	No
Form Completes	Measure	Integer	No

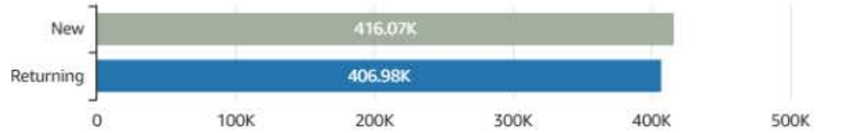
How much traffic is hitting our site?

Total Unique Visitors

823,056

Unique Visitors

By Visitor Type

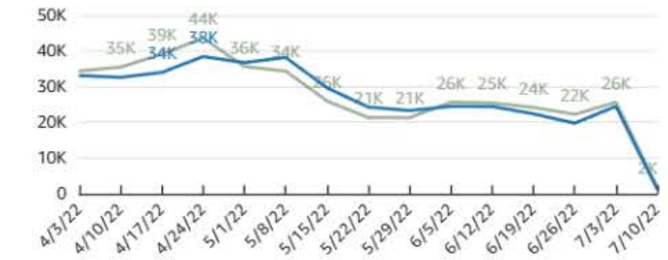


Visitor Type Difference

9,088

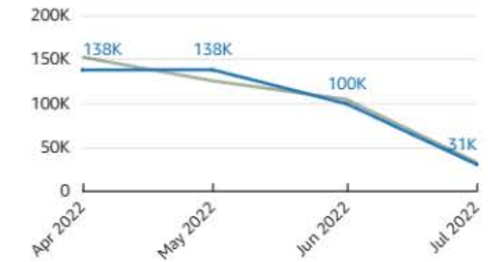
Unique Visitors

By Visitor Type and Week



Unique Visitors

By Visitor Type and Week



What % of visitors are completing the forms?

Overall Complete Rate

25%

Form Completion Rate

By Form and Month

Form Completion Rate

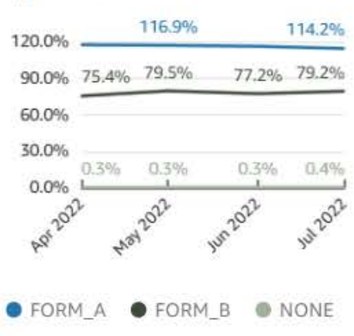
By Form and Week

Overall Start Rate

15%

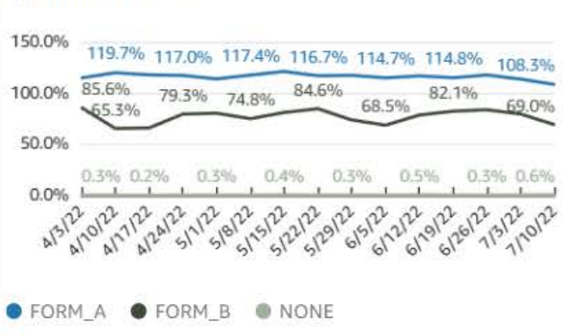
Form Start Rate

By Form and Month



Form Start Date

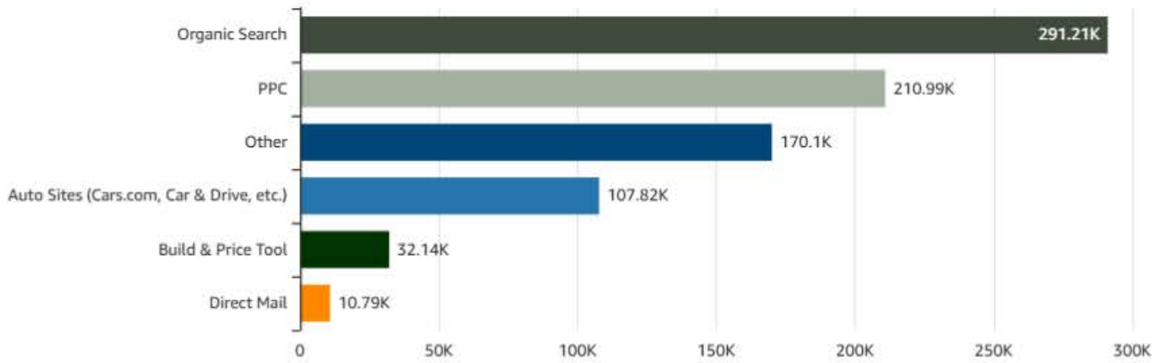
By Form and Week



Which channels are best at generating traffic?

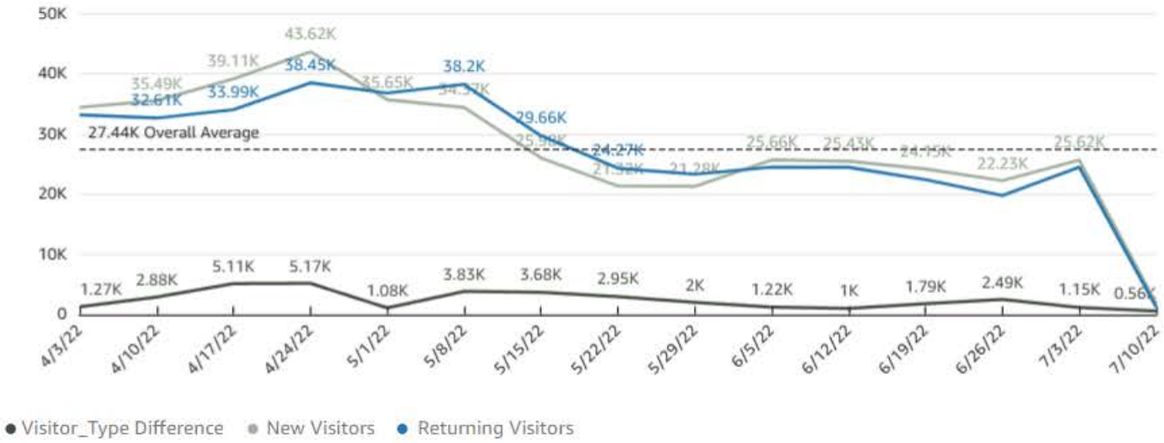
Unique Visitors

By Channel



Unique Visitors

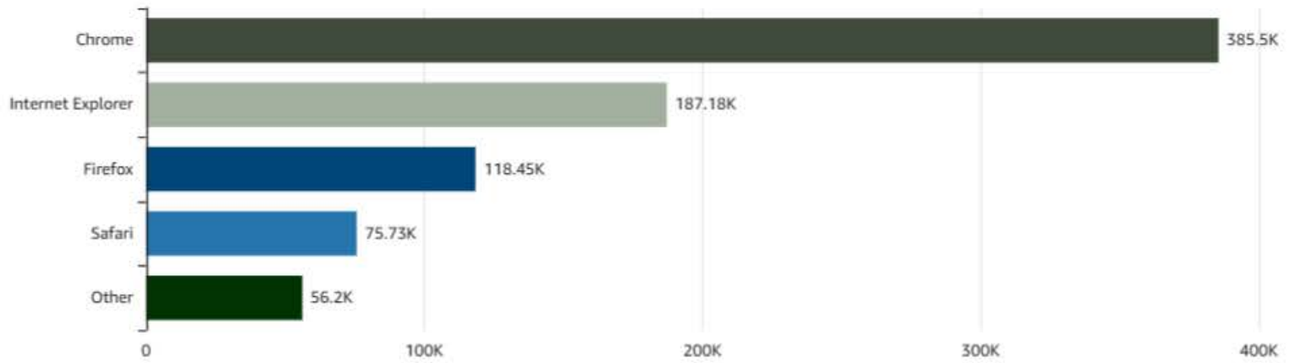
By Visitor Type and Week



Are any browser versions breaking or underperforming?

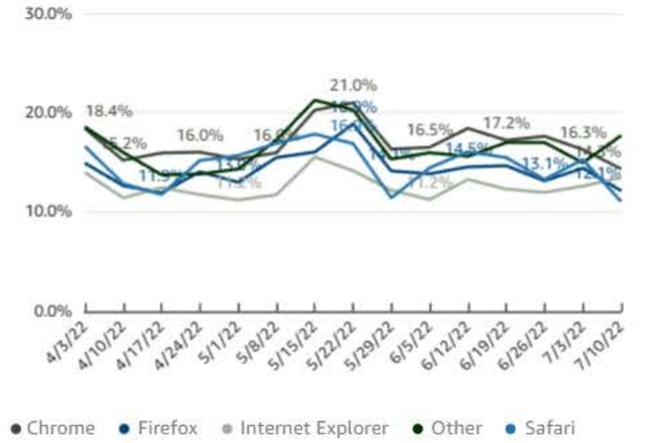
Unique Visitors

By Browser



Form Completion Rate

By Browser and Week

Form Start Date

By Week