AI-Assisted Power BI for Business Analytics

Figure 1: AI-Assisted Power BI for Business Analytics

Business Requirements Document (BRD)

Project Name: [Report/Dashboard Name] **Requestor:** [Business Owner Name & Department] **Date:** [Request Date] **Priority:** High | Medium | Low

1. Executive Summary

One paragraph describing the business need and expected outcome.

> Example: The Sales Leadership team needs a monthly revenue dashboard to track performance against targets and identify underperforming regions, enabling faster decision-making during quarterly business reviews.

2. Business Objectives

What business problem does this report solve?

Objective	Success Metric
[Objective 1]	[How will we measure success?]
[Objective 2]	[How will we measure success?]

3. Target Audience

Who will use this report and how?

Audience	Role	How They'll Use It
[e.g., Sales VPs]	[Decision Maker]	[Weekly performance reviews]
[e.g., Regional Managers]	[Operational User]	[Daily pipeline monitoring]

4. Key Questions to Answer

What specific questions should this report help users answer?

1. [Question 1] *Example: Which regions are meeting their quarterly targets?*
2. [Question 2] *Example: What is the trend in new customer acquisition?*
3. [Question 3] *Example: Which products have the highest profit margins?*
4. [Question 4]
5. [Question 5]

5. Required Metrics & KPIs

Metric/KPI	Definition	Source
[e.g., Total Revenue]	[Sum of all sales transactions]	[Sales database]
[e.g., Win Rate]	[Deals won ÷ Total deals]	[CRM system]
[e.g., Customer Count]	[Distinct active customers]	[Customer master]

6. Filters & Interactivity

What filters should users be able to apply?

- ☐ Date/Time Period (Year, Quarter, Month)
- ☐ Geography (Region, Country, City)
- ☐ Product (Category, Product Line, SKU)
- ☐ Customer (Segment, Industry, Size)
- ☐ Other: _____

7. Data Requirements

Requirement	Details
Data Sources	[List systems/files]
Refresh Frequency	Daily / Weekly / Monthly / Real-time
Historical Data Needed	[e.g., Last 3 years]
Data Sensitivity	Public / Internal / Confidential

8. Delivery Requirements

Requirement	Details
Delivery Format	Power BI Dashboard / Embedded / PDF Export
Access Method	Power BI Service / Teams / SharePoint
Mobile Access Needed?	Yes / No
Target Go-Live Date	[Date]

9. Approval

Role	Name	Date	Signature
Business Owner			
Data Owner			
Project Lead			

Template Version 1.0 (For educational purposes)