Present big data insights

Assessment 3 of 5

Case Study

Assessment Instructions

Task overview

This assessment task is divided into three [3] parts having four [4] activities. Read each question carefully before documenting the demonstration task evidence in the spaces provided.

To complete this assessment, you will need the following:

- AUS Retail_Stakeholder communication policy.docx
- AUS Retail_Big data source identification policy.docx

Assessment Information

Submission

You are entitled to three [3] attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.
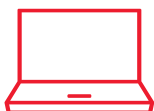
Please consider the environment before printing this assessment.

Part A: Case study scenario

All tasks in this assessment refer to a simulated environment where conditions are typical of a work environment that uses big data related to a fictitious retail business organisation called 'AUS Retail'.

Read the case study scenario carefully before doing the tasks in Part B.

A1. Company Background

AUS Retail started as a single retail store based in Sydney, NSW. They now have retail store locations across several other states and territories in Australia and continue to grow with the goal of eventually setting up stores across all states in Australia. As the business is growing rapidly, the management requires a more accurate and efficient way to gain insights into their retail sales, store performance, products and vendor quality.

Current project

To gain better insights into the organisation's big data, a separate team have been assigned to analyse and present the organisation's transactional and non-transactional data. The team will be led by the **Chief Data Officer (CDO)**, Mia Gonzales.

Mia had prepared a series of policy and procedure documents with up-to-date information on the process that should be followed by the analyst team when gathering requirements for presenting big data insights.

A2. Your role

You have recently joined AUS Retail as a trainee analyst and have been given the opportunity to work on the new big data analysis project. Your supervisor is Mia Gonzales (CDO). You must comply with any legislative requirements and follow any standard operating procedures as outlined in AUS Retail's policy and procedure documents when preparing to present big data insights.

A3. Standards, legislative requirements and procedures

You are provided with the following organisational documents and data files related to the fictitious organisation AUS Retail to assist with the big data analysis process.

- **AUS Retail_Stakeholder communication policy.docx** – This includes organisational procedures, communication protocols and standards used when engaging with key stakeholders and other interdisciplinary teams in the organisation for gathering business requirements for presenting big data insights.
- **AUS Retail_Big data source identification policy.docx** – This contains the details of internal organisational systems from which various types of data flow and their relationships. Also includes legislative requirements that would apply when identifying and obtaining big datasets for analysis and presentation of insights.

Part B: Prepare to present big data insights

To complete this part of the assessment, you are required to:

- carefully read the scenario details outlined in Part A and within this section
- follow the organisational policy, procedures, communication protocols and standards provided.

Scenario continued:

You have received the following email from your supervisor Mia Gonzales, to brief you about the task.

From: Gonzales, Mia
To: Student Lastname, Student Firstname
Attached documents: *AUS Retail_Stakeholder communication policy.docx*
Subject: Gathering business requirements for presenting big data

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Hi <student name>,

Welcome to the big data analysis project team. I want to brief you on the first task.

As business is growing rapidly, AUS Retail's management demands a more accurate and efficient way to gain insights into their operations. Therefore, our team is tasked with creating two dashboards to present big data insights to AUS Retail's key stakeholders.

- **Presentation #1:** The first presentation of big data insights was requested by AUS Retail's CFO, Karen Jones [Karen.Jones@ausretail.com.au] to provide insights into the gross profit margins (monthly and yearly) of the sales figures from all AUS Retail's store locations with breakdowns for product categories and customer segments. The recent reports from the stores during 2018-2021 have suggested that these values were lower than the expected value.
- **Presentation #2:** The second presentation of big data insights was requested by AUS Retail's Head of Operations, Daniel Brown [Daniel.Brown@ausretail.com.au] to provide visibility of the vendor product quality. The recent reports on product defects from all store locations during the period of 2018-2021 suggested that some product shipments from specific vendors had significant numbers of defects which seemed to be increasing every year.

Your task: Before conducting any analysis, we need to gather more information on each issue and the specific requirements and expectations of each stakeholder for presenting big data insights. So, your first task involves the following:

1. Prepare two questionnaires to capture essential business requirements for the context of each presentation using the recommended form. When forming the questions, make sure that the language is clear, specific and relevant.
2. Send the completed questionnaire to the respective stakeholders via email requesting them to confirm the business requirements and provide us with any other relevant information. Also, remember to CC me in your emails so I can follow it up with the stakeholders if required.

The following sections in the *AUS Retail_ Stakeholder communication policy.docx* document will provide you with the document templates (questionnaire and email templates) that should be used and guidelines on preparing a questionnaire to effectively capture the business requirements.

- 4.1 Prepare questionnaires to gather information
- 4.2 Procedure to confirm business requirements
- 5.2 Electronic mail (email) communications

All the best on your first task and kind regards,

Mia Gonzales
Chief Data Officer (CDO)
Mia.Gonzales@ausretail.com.au

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B1. Prepare to present big data insights for 'Presentation #1'

In this task, you will be preparing to present big data insights for 'Presentation #1' according to the instructions received from your supervisor.

Task:

a. Prepare a questionnaire to gather business requirements for presenting big data insights for 'Presentation 1#'.

   Note: Use the 'Business requirements gathering' form according to *AUS Retail_Stakeholder communication policy.docx* document to include the following details.
   i. Context of the presentation (under Section A.1, of the form)
   ii. Target audience (under Section A.2, of the form)
   iii. List 5-10 questions to gather requirements from stakeholders (under Section B, of the form).

b. Write a draft email addressed to the correct stakeholder/s requesting to confirm business requirements for presenting big data insights.

   When drafting the email, you must:
   i. briefly outline the purpose of the email using clear, specific and industry-related terminology
   ii. include a copy of the completed 'Business requirement gathering' form within the body of the email
   iii. request a response from the recipient, to confirm business requirements
   iv. use AUS Retail's standard email template to draft the email.

   (Word count: 65 – 95 words in the email body, excluding the information in the form).

Portfolio of evidence: *(Drafted email to stakeholder/s and form completion)*

Draft your email in the space given below.

Assessor instructions: Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:
- be within the specified word limit (for the email body)
- reflect the characteristics described in the exemplar answer
- include a copy of the 'Business requirement gathering' with **Section A** (Context and Target audience) and **Section B** (Questionnaire to gather requirements for Presentation #1) completed.

A sample answer is provided below.

Lastname, Firstname
From: Lastname, Firstname
Sent: Tuesday, 01st November 2022 10:44 AM
To: Jones, Karen
CC: Gonzales, Mia
Subject: Business requirements for creating the requested interactive dashboard

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Hi Karen,

I'm writing to request additional information related to your request to create a dashboard. To help us better understand specific requirements and your expectations of the dashboard, I have prepared a questionnaire to capture the information we need from you. If you could please complete the questionnaire (answering all the questions listed) and confirm your business requirements that will be great.

 AUS Retail	Business requirement gathering	
	Purpose:	To gather requirements for presenting big data insights

Section A: General project details	
1. **Context:**	To provide insights into the gross profit margins (monthly and yearly) of the sales figures from all AUS Retail stores with breakdowns for product categories and customer segments
2. **Target audience:** (Primary, e.g. Project sponsor)	CFO of AUS Retail, Karen Jones

Section B: Questionnaire	
Q1. Who is this presentation for? (Please specify if it is only for yourself or if there are any other business users who will use this dashboard?	Click or tap here to enter text.
Q2. What are the business needs of the dashboard? (For example, is it for summarising key figures, analysing issues or for monitoring? of meeting specific targets?	Click or tap here to enter text.
Q3. When will the dashboard be used?	Click or tap here to enter text.
Q4. How timely or up to date must the data be? (E.g. Daily, Weekly, Monthly, etc)	Click or tap here to enter text.
Q5. What KPIs would represent a successful end result for the business?	Click or tap here to enter text.

Looking forward to your response.

Thanks and kind regards,

Firstname Lastname
Trainee Analyst
Firstname.Lastname@ausretail.com.au

AUS Retail

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B2. Prepare to present big data insights for 'Presentation #2'

In this task, you will be preparing to present big data insights for 'Presentation #2' according to the instructions received from your supervisor.

Task:

a. Prepare a questionnaire to gather business requirements for presenting big data insights for 'Presentation #1'.

    Note: Use the 'Business requirements gathering' form according to *AUS Retail_Stakeholder communication policy.docx* document to include the following details.
      i.   Context of the presentation [under Section A.1, of the form]
      ii.   Target audience [under Section A.2, of the form]
      iii. List 5-10 questions to gather requirements from stakeholders [under Section B, of the form].

b. Write a draft email addressed to the correct stakeholder/s requesting to confirm business requirements for presenting big data insights.

    When drafting the email, you must:
      i.   briefly outline the purpose of the email using clear, specific and industry-related terminology
      ii.   include a copy of the completed 'Business requirement gathering' form within the body of the email
      iii. request a response from the recipient, to confirm business requirements
      iv.   use AUS Retail's standard email template to draft the email.

    [Word count: 65 – 95 words in the email body, excluding the information in the form].

Portfolio of evidence: *[Drafted email to stakeholder/s and form completion]*

Draft your email in the space given below.

Assessor instructions: Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:
* be within the specified word limit [for the email body]
* reflect the characteristics described in the exemplar answer
* include a copy of the 'Business requirement gathering' with **Section A** [Context and Target audience] and **Section B** [Questionnaire to gather requirements for Presentation #2] completed.

A sample answer is provided below.

Lastname, Firstname
From: Lastname, Firstname
Sent: Tuesday, 01st November 2022 10:44 AM
To: Brown, Daniel
CC: Gonzales, Mia
Subject: Business requirement gathering for creating the requested interactive dashboard

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Hi Daniel,

I'm writing to request additional information related to your request to create a dashboard. To help us better understand specific requirements and your expectations of the dashboard, I have prepared a questionnaire to capture the information we need from you. If you could please complete the questionnaire [answering all the questions listed] and confirm your business requirements that will be great.

Looking forward to your response.

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AUS Retail	Business requirement gathering	
	Purpose:	To gather requirements for presenting big data insights

Section A: General project details	
1. Context:	To provide insights into product defects over the period of 2018-2021 and to analyse vendor quality.
2. Target audience: [Primary, e.g. Project sponsor]	AUS Retail's Head of Operations, Daniel Brown

Section B: Questionnaire	
Q1. Who is this presentation for? [Please specify if it is only for yourself or if there are any other business users who will use this dashboard?	Click or tap here to enter text.
Q2. What are the business needs of the dashboard? [For example, is it for summarising key figures, analysing issues or for monitoring? of meeting specific targets?	Click or tap here to enter text.
Q3. When will the dashboard be used?	Click or tap here to enter text.
Q4. How timely or up to date must the data be? [E.g. Daily, Weekly, Monthly, etc]	Click or tap here to enter text.
Q5. What KPIs would represent a successful end result for the business?	Click or tap here to enter text.

Thanks and kind regards,

Firstname Lastname

Trainee Analyst

Firstname.Lastname@ausretail.com.au

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Part C: Collaborate with interdisciplinary teams

To complete this part of the assessment, you are required to:

- carefully read the scenario details outlined within this section
- follow the organisational policy, procedures, legislative requirements, communication protocols and standards provided.

Scenario continued:

You have received the following email from your supervisor Mia Gonzales, to brief you about the task.

From: Gonzales, Mia
To: Student Lastname, Student Firstname
Attached documents: *AUS Retail_Big data source identification policy.docx*

Subject: Process to obtain the relevant big datasets required for presentations

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Hi <student name>,

Great work on sending out the questionnaires to the stakeholders for gathering business requirements.

Your next task is collaborating with the relevant departments to identify captured big datasets relevant to 'Presentation #1' and 'Presentation #2'. To develop the presentations, we will need access to the relevant big data captured within 2018-2021.

Please review the *AUS Retail_ Big data source identification policy.docx* to understand the types of data that flow within each part of the organisation and the general business processes within AUS Retail. You also need to consider any legislative requirements that may apply to the data obtained from AUS Retail's internal systems. Section 5 of this policy document outlines the process that you need to follow when requesting access to the required datasets and includes a template of the form that you need to fill in.

Here are the contacts details of the teams that you will need to collaborate with.

- Production department – Production@ausretail.com.au
- Sales department – Sales@ausretail.com.au
- Customer Relations – CustomerRelations@ausretail.com.au
- IT Support department – ITsupport@ausretail.com.au

Once you've identified the specific details of the data required for the presentations, you need to request access to these datasets from the respective departments and the IT Support team (who will organise access to the required datasets) along with the completed 'Request for big data access' form. Also, remember to CC me in your email so I can follow up with them if required.

All the best and kind regards,

Mia Gonzales
Chief Data Officer (CDO)
Mia.Gonzales@ausretail.com.au

![AUS Retail logo]

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C1. Identify relevant big data required for 'Presentation #1'

In this task, you are required to collaborate with the relevant teams to identify the captured data relevant to 'Presentation #1' according to the instructions received from your supervisor.

Task:

Write a draft email addressed to the correct stakeholder/s, requesting confirmation and access to the captured big datasets relevant to 'Presentation #1'.

When drafting the email, you must:

a.   briefly outline the purpose of the email using clear, specific and industry-related terminology
b.   include a copy of the completed 'Request for big data access' form within the body of the email listing the identified big data relevant to the presentation
c.   request a response from the correct department/s (team/s), to confirm the relevance and accuracy of the identified big data and to raise any legislative concerns that may apply to the data
d.   request a response from the correct department (team), regarding access to the captured data
e.   use AUS Retail's standard email template to draft the email.

(Word count: 85 – 115 words in the email body, excluding the information in the form).

Portfolio of evidence: *(Drafted email to collaborate with interdisciplinary teams)*

Draft your email in the space given below.

Assessor instructions: Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:
- be within the specified word limit (for the email body)
- reflect the characteristics described in the exemplar answer
- list identified captured big data relevant to the presentation
- show collaboration with relevant interdisciplinary teams (Sales, Customer Relations, Production and IT Support)

A sample answer is provided below.

Lastname, Firstname
From: Lastname, Firstname
Sent: Tuesday, 01st November 2022 10:44 AM
To: Sales Department (Sales@ausretail.com.au), **Customer Relations** (CustomerRelations@ausretail.com.au), **Production** Department (Production@ausretail.com.au), IT Support (ITSupport@ausretail.com.au)
CC: Gonzales, Mia
Subject: Request confirmation and access to captured big data related to Sales

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Hi all,

The analyst team is preparing to present sales-related data along with product category and customer segment information to a key stakeholder.

Please find the completed 'Request for big data access' form with details of the datasets I have identified so far.

Therefore, I would like to request the **Sales** and **Customer Relations** and **Production** teams, to please confirm the relevance and accuracy of the dataset details outlined in the form. Also, please flag if there are legislative requirements other than what is outlined in the form.

IT Support team, can you please arrange for the data analyst team access to the required dataset?

AUS Retail	Request for big data access	
	Purpose:	To provide insights into the gross profit margins (monthly and yearly) of the sales figures from all AUS Retail stores with breakdowns for product categories and customer segments.
Section A: Dataset details *(to be filled by the data analyst)*		
1. Date range:	01/01/2018 to 31/12/2021	
2. Database Name/s:	Transactions database	
3. Table Name/s:	Transactions, Store, Customer, Product, Category	
4. Field Name/s:	Order ID, Product ID, Customer ID, Category ID, Sales, Costs, Discount, Quantity, Store ID, State, Store Location, Postcode, Customer Segment.	
Section B: Other details [*to be filled by the data analyst*]		
5. Legislative requirements:	According to AUS Retail's data protection and privacy policy all records related to customers should be de-identified. Except for the 'Customer ID' and 'Segment', any identifiable customer data (such as name, phone, email, address etc.) should not be included in the dataset.	

Looking forward to your response.

Thanks and kind regards,

Firstname Lastname
Trainee Analyst
Firstname.Lastname@ausretail.com.au

AUS Retail

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C2. Identify relevant big data required for 'Presentation #2'
In this task, you are required to collaborate with the relevant teams to identify the captured data relevant to 'Presentation #2' according to the instructions received from your supervisor.

Task:

Write a draft email addressed to the correct stakeholder/s, requesting confirmation and access to the captured big datasets relevant to 'Presentation #2'.

When drafting the email, you must:

a. briefly outline the purpose of the email using clear, specific and industry-related terminology
b. include a copy of the completed 'Request for big data access' form within the body of the email listing the identified big data relevant to the presentation
c. request a response from the correct department (team), to confirm the relevance and accuracy of the identified big data and to raise any legislative concerns that may apply to the data
d. request a response from the correct department (team), regarding access to the captured data
e. use AUS Retail's standard email template to draft the email.

(Word count: 85 – 115 words in the email body, excluding the information in the form).

Portfolio of evidence: *(Drafted email to collaborate with interdisciplinary teams)*

Draft your email in the space given below.

Assessor instructions: Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:
• be within the specified word limit (for the email body)
• reflect the characteristics described in the exemplar answer
• list identified captured big data relevant to the presentation
• show collaboration with relevant interdisciplinary teams (Production and IT Support)

A sample answer is provided below.

Lastname, Firstname
From: Lastname, Firstname
Sent: Tuesday, 01st November 2022 11:00 AM
To: Production Department [Production@ausretail.com.au], IT Support [ITSupport@ausretail.com.au]
CC: Gonzales, Mia
Subject: Request confirmation and access to captured big data related to vendor product quality

Hi all,

The analyst team is preparing to present vendor product quality related datainformation to a key stakeholder.

Please find the completed 'Request for big data access' form with details of the datasets I have identified so far.

Therefore, I would like to request the **Production** team, to please confirm the relevance and accuracy of the dataset details outlined in the form. Also, please flag if there are legislative requirements that may apply.

IT Support team, can you please arrange for the data analyst team access to the required dataset?

AUS Retail	Request for big data access	
	Purpose:	To provide insights into product defects over the period of 2018–2021 and to analyse vendor product quality.
Section A: Dataset details *(to be filled by the data analyst)*		
1. **Date range:**	01/01/2018 to 31/12/2021	
2. **Database Name/s:**	Products Database, Product Defects Database	
3. **Table Name/s:**	Product Defects, Defect, Impact, Vendor, Category	

4. Field Name/s:	Vendor ID, Vendor Name, Defect ID, Defect, Impact ID, Impact, Category ID, Category Name, Subcategory
Section B: Other details [*to be filled by the data analyst*]	
5. Legislative requirements:	N/A

Looking forward to your response.

Thanks and kind regards,

Firstname Lastname
Trainee Analyst
Firstname.Lastname@ausretail.com.au

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Assessment checklist:

Students must have completed all activities within this assessment before submitting. This includes:

Part B: Prepare to present big data insights		
B1	Email to Stakeholder/s – email draft and completed form to confirm business requirements for Presentation #1	☐
B2	Email to Stakeholder/s – email draft and completed form to confirm business requirements for Presentation #2	☐
Part C: Collaborate with interdisciplinary teams		
C1	Email to interdisciplinary teams – email draft to identify captured big data relevant to Presentation #1	☐
C2	Email to interdisciplinary teams – email draft to identify captured big data relevant to Presentation #2	☐

Congratulations you have reached the end of Assessment [3]!