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DossBoss Challenge

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World DossBoss Challenge

Showcase your dossier expertise for a cryptocurrency brokerage firm

You are a dossier designer for DigiBank, a brokerage firm that specializes in helping clients invest in cryptocurrency, particularly in Bitcoin. The head of Brokerage Services has asked you to create a DigiBank Client Analysis dossier.

She wants the dossier to help her team analyze and track their clients who are currently trading Bitcoin, along with individual broker performance. She also wants her team to have an overview of Bitcoin pricing against other trading options. You held a requirements gathering session with your stakeholders, individual brokers and their managers. Below is a list of the analysis goals, available data, and dossier delivery methods you gathered from your interviews.

Analysis goals

- Brokers formulate business development strategies for their current clients. To work with their clients to encourage increased trading, brokers might want to analyze:
  - Number of purchases per client

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    - Total account value overall and per client
    - Last trade date
- In addition to understanding their current client base, brokers focus on overall customer growth strategies and sourcing new relationships. To achieve this goal, a broker might want to know:
    - What are the demographics of the overall customer base?
    - What are the job sectors of current clients, to help target specific job areas to build future pipeline.
- Managers are responsible for their brokers' overall portfolio performance and growth. To achieve this goal, managers might want to know:
    - What is the total value of a broker's portfolio?
    - How many customers does each broker manage?
    - When was the last trade
- Brokers must have a good understanding of the market. To achieve this goal, provide an overview of cyptocurrency market performance that brokers can quickly access when discussing trading options with customers.
- Brokers and their managers contribute to ideas for improving the company's web portal, to get more clients to sign up for brokerage services. They might want to know:
    - At what points in DigiBank's web portal workflow do clients abandon the process to sign up for a tour?

Data

Digibank has access to the following data:

- **Client data**: Includes detailed information on client portfolios and the DigiBank brokers
- **Web portal data**: Tracks user progress through various pages on DigiBank's web portal to see how many clients complete the workflow to sign up for services and where clients abandon the process. The steps to sign up for services are listed below, in the order of the workflow steps:

    1. Source
    2. Products

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3 Get Started

4 Buy and Sell

5 Sign up

Hint: Use this data to create a Sankey diagram.

- **Asset pricing data**: Performance data for Bitcoin, Ethereum, Dogecoin, S&P 500, and gold.
- Though not required, you may also add datasets that you find on your own, to enhance your analysis.

Delivery

The brokers consume all dossiers on both Library and Library Mobile.

Getting started

- **Datasets:** A zip file of the datasets listed in *Data, page 5*.
- If you choose to enhance your dossier with additional data, it must be publicly available data.

Timeline for submission

- You may start this challenge at any time.
- To enter the contest and be eligible for the prizes, you must submit your dossier by **January 23rd**, 2022.

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Evaluation

To enter the World DossBoss challenge:

- Address the analysis goals listed in *Analysis goals, page 4*.
- Include as many of the new following features, in a way that demonstrates appropriate use:

Feature
Microchart
Compound grid
Sankey diagram *(Hint: Use the Web Portal data)*
Time series visualization
Multi-metric KPI or Comparison KPI
Geospatial map using either Border or Focused style
Panel stack
Rich text box
Dynamic filter
Geometric shapes
Synchronized chapter filters

- Effectively optimize the dossier for use on a mobile device
- Dossiers are evaluated on a scale of 1-4 in each category, with 4 as the highest. Examples of evaluation considerations in each category are included below:

Category	Example Evaluation Considerations
Analysis goals	• User can easily and intuitively accomplish each analysis goal listed in *Analysis goals, page 4* • Data and visualizations are used appropriately
Dossier features	• Variety of visualizations used • Total count of different features used • Advanced filtering and page-to-page targeting • Thresholds and linking features • Formatting and design of titles and containers • Advanced dossier knowledge showcased

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Category	Example Evaluation Considerations
Creativity and innovation	• Generates creative insights based on data or additional data • Creatively displays chapters, pages, and/or navigation to tell a story with data • Incorporates visuals, color schemes, or additional text • Integrates images, videos, or web links

Dossiers entered into the contest will be reviewed by a panel of MicroStrategy judges, who will decide on three winners. During the World Community event, an overall winner will be chosen by live voting. The top three dossier authors have five minutes to walk through their dossiers.

Submitting your dossier

Follow the steps below to submit your dossier. **You must submit your dossier by January 23rd**.

Finalize and save your dossiers.

1. Save your dossier with the applicable naming convention:
   - If you worked alone: ***FirstNameLastName*_DossBoss2022** (for example, JohnSmith_DossierChallenge2022)
   - If you worked in a pair or group: ***TeamName*_DossBoss2022** (create your own team name)
2. Download your dossier as a .mstr file.

Submit your dossier to the challenge inbox

1. Visit **https://mstr.wufoo.com/forms/whpg89k0z1owdb/** and follow the instructions to upload your .mstr file.

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