

Digital Freelancer:

Managing Freelancing Projects



Project: Working with a Mock Client



Part 1

Project Listing

Sample Project Listing #3:

Data Analyst

Seeking experienced Data Analyst to build dashboard for local insurance company.

Posted 1 week ago

Hourly: \$90.00 Based on experience.

Project Time: 1 year, 20 hours a week.

Project Description:

I have taken over a local car insurance company from my parents and have inherited hundreds of Excel spreadsheets with past and current customer information. I need help organizing this data and creating a dashboard to allow me to filter the data and create reports as needed. I would also need guidance on how to transfer the data to the tool of your choice. Looking forward to working together!



Part 2

Expression of Interest

Expression of Interest

Write an initial expression of interest (Eoi) to the client:

- Now that you've understood what the client is asking for, it's time for you to reach out to them.
- Write out an Eoi message addressing their requirements as well as how you can help them.
- This message will be their first impression of how you communicate with them, so it is good to be professional.
- Please keep word limit between 200 - 300 words.

Expression of Interest (Provided)

Which Sample Project Listing did you select to respond to?

Answer: (Project 3) Seeking experienced Data Analyst to build dashboard for local insurance company

Please type your initial response to the client below. This should be between 200 - 300 words.

Expression of Interest:

Dear [Client's Name],

I am excited about the opportunity to assist you in organizing and optimizing your inherited car insurance data. From your description, I understand your need to sort and organize a large collection of Excel spreadsheets, create an interactive dashboard with filtering and reporting capabilities, and establish a seamless methodology for transferring data to a suitable platform.

To address these requirements, I propose using a SQL database for efficient data management and Tableau for building an interactive, user-friendly dashboard tailored to your business needs. My expertise includes:

Data Organization: Consolidating and cleaning complex datasets to ensure accuracy and consistency.

Interactive Dashboards: Designing intuitive dashboards that provide actionable insights and allow filtering, reporting, and trend analysis.

Tool Integration and Migration: Transitioning your data to a robust and scalable solution, with a focus on ease of use.

Knowledge Transfer: Offering guidance and training to ensure you can confidently manage the system moving forward.

With my experience in Excel, Tableau, and SQL, I am confident in my ability to streamline your data processes, saving you time and effort while providing you with actionable insights to support your decision-making.

I look forward to discussing your vision further and collaborating to contribute to the success of your car insurance company. Please let me know a convenient time to connect.

Thank you for considering my services!

Best regards,

AK



Part 3

Project Management Process

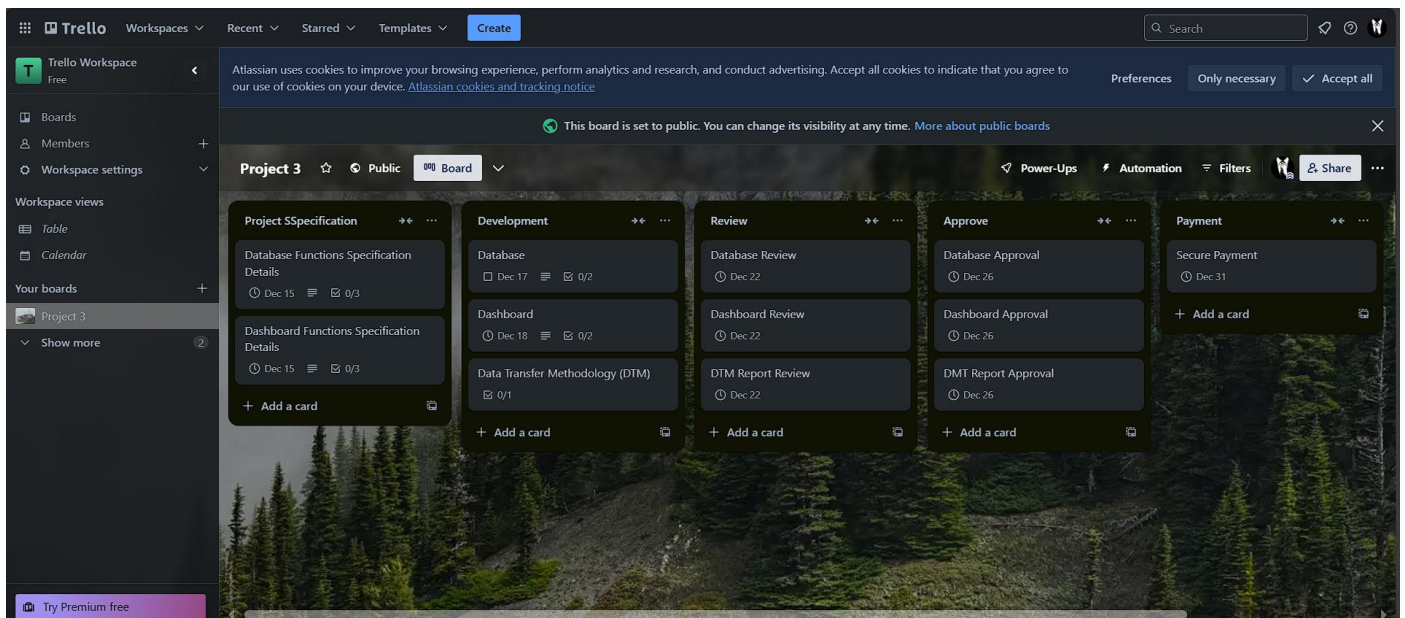
Trello Board

Please include the following information for your Trello board:

A link to your public Trello board should be provided here:

[Project 3 | Trello](#)

Include a screenshot of the board below:





Part 4

Invoice and Payment Options

Invoice

Recipient:
Safe Side Inc
456 Elm Avenue, Chicago, IL 60602

Invoice #: 2024012015
Date issued: 31/12/2024
Date due: 02/01/2025
Services Rendered (Continue on next page)

Service	Description of Work Done	Hours Spent	Amount Per Hour	Total
Excel Sheets Data organizing	Gathered, analyzed and organized the data within the all Excel Data Sheets.	10	90\$	900\$
Database Creation	*Creating Database specification document *Creating the Databaseand its features	12	90\$	1080\$
Dashboard Creation	*Creating dashboard specification document *Creating the dashboard and its features	8	90\$	720\$
Data Transfer Methodology (DTM) Report	Create data transfer methodology report that It covers key aspects such as data formats, transfer protocols, encryption techniques, error-handling mechanisms, and performance optimization strategies	4	90	360\$

-Total Payment Due:

3,060 \$ (three thousand sixty USD)

-Payment Options:

Bank Transfer Account Number : 1234-5678-9012-3456
PayPal : Alexjhonson@domain.com