

Customer Segmentation Dashboard – Excel Project Report

1. Project Objective

Analyze and segment customers based on demographics, income, tenure, loyalty, profession, and region to support data-driven business decisions.

2. Problem Definition

Businesses face challenges in identifying valuable customer segments, understanding loyalty, and optimizing engagement strategies.

3. Key Business Questions

- Who are our most valuable customers?
- How loyal are customers across segments?
- Which generations and professions dominate?
- How has customer growth changed over time?

4. Dataset Description

Includes customer age, income, tenure, loyalty level, wealth category, profession, region, and customer type.

5. KPIs

- Total Customers: 500
- Average Age: 46
- Average Income: \$114.4K
- Average Tenure: 5 Years
- Loyal Customers: 40%

6. Data Visualization & Insights

- Millennials and Gen X dominate the customer base
- Medium and High wealth customers contribute most
- Growth peaked between 2016–2018
- Doctors, Engineers, and Teachers are major segments

7. Tools Used

Microsoft Excel – Pivot Tables, Charts, Slicers, Dashboard Design

8. Business Recommendations

- Focus on loyalty programs
- Target high-income customers
- Improve engagement in declining regions

9. Conclusion

The dashboard provides actionable insights to enhance customer engagement and strategic planning.