1. **Understand the Questions**: The first step is to understand what the client is asking for. In this case, they’re interested in customer segmentation, marketing channel effectiveness, and claim analysis.
2. **Explore the Dataset**: Before you start any analysis, get familiar with the dataset. Look at the range and distribution of values in each column, check for missing values, and understand the relationships between different columns.
3. **Customer Segmentation**:
   * Identify the key characteristics that define a customer segment. These could be demographics (like state, education, employment status, gender, income, marital status), policy details (like coverage, policy type, renew offer type, number of policies), or vehicle information (like vehicle class, vehicle size).
   * Use Excel or SQL to group customers based on these characteristics and calculate summary statistics for each group.
4. **Marketing Channel Effectiveness**:
   * Identify the key metrics that will allow you to measure the effectiveness of each sales channel. This could be the number of policies sold, the total claim amount, or the customer lifetime value.
   * Use Excel or SQL to calculate these metrics for each sales channel.
5. **Claim Analysis**:
   * Identify trends or patterns in the claim history. This could involve looking at the number of claims over time, the total claim amount by customer segment, or the time since the last claim.
   * Use Excel or SQL to analyze the claim history and Power BI to visualize your findings.
6. **Prepare Your Findings**: Once you’ve completed your analysis, prepare a summary of your findings. This should be clear and concise, highlighting the key insights from your analysis.
7. **Present Your Findings**: Use Power BI to create visualizations that illustrate your findings. This will make it easier for the client to understand your analysis.