

PROJECT SUMMARY

1. Introduction

This project is divided into two parts, focusing on data analysis using Power BI and delivering actionable insights based on customer and sales data.

Part 1: Customer Data Analysis

Objective:

To import, transform, and analyze customer data across three workbooks to generate key insights about customer demographics and banking behaviors.

Steps Taken:

1. Data Import and Transformation

- Imported two workbooks (Bank details and Bank details 1.2) into Power BI.
- Uploaded the third workbook (Bank Details 1.2) to Google Drive.

2. Data Relationships

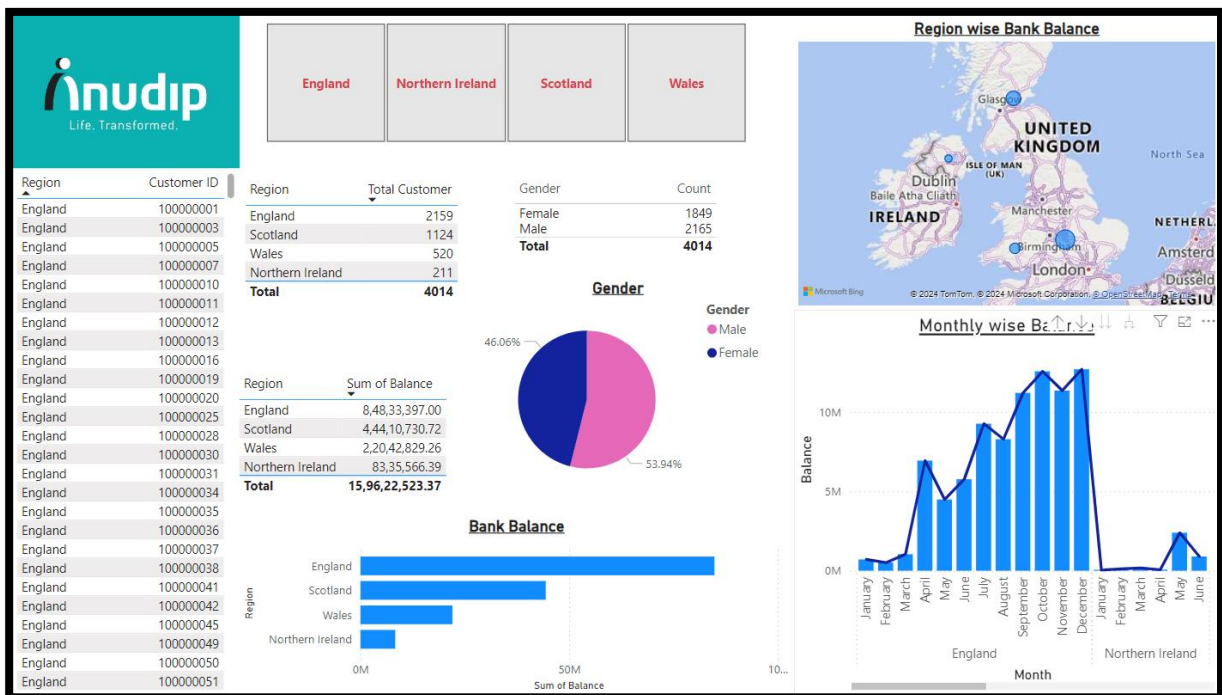
- Established relationships between the three workbooks for cohesive analysis.

3. Data Analysis & Visualization

- Region-wise analysis of the following:
 - Number of customers.
 - Number of male and female customers.
 - Customer distribution globally.
 - Region-wise customer bank balance.
 - Monthly bank balance trends.

4. Final Deliverables

- Power BI file saved and shared.
- Screenshots of each visualization and analysis to support the findings.



Part 2: Sales Data Analysis

Objective:

To import, transform, and analyze sales data to evaluate the performance of sales representatives and identify areas for improvement.

Steps Taken:

1. Data Import and Transformation

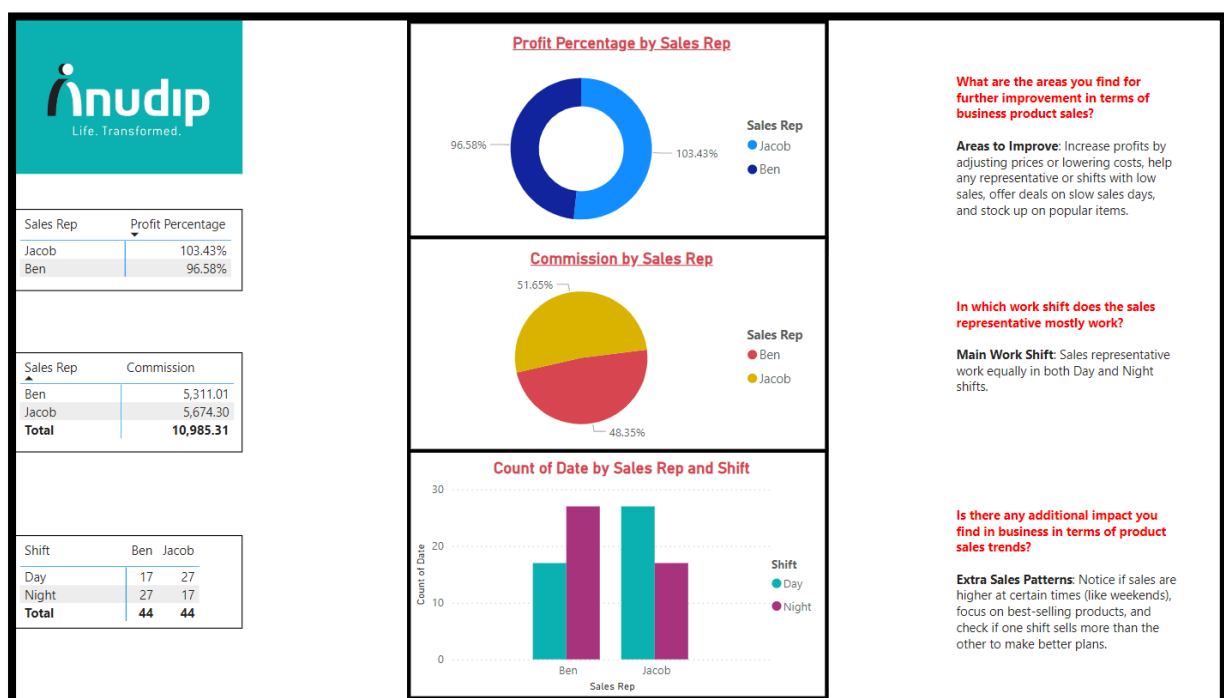
- Imported the Sales Data file into Power BI.

2. Data Analysis & Visualization

- Analyzed overall profit percentage and commission for each sales representative.
- Evaluated monthly work shift patterns (day and night) for each representative.

3. Final Deliverables

- Power BI file saved and shared.
- Screenshots of each visualization to present findings.



Conclusion

The project involved comprehensive data processing and analysis using Power BI to derive insights on customer demographics, banking behavior, and sales performance. The findings can help in decision-making, improving business strategies, and identifying potential areas for operational improvements.