Challenge:

To prepare a visualizing BI report for Bank Customers in different regions of the UK.

Report:

1) Add the desired data file into the Tableau, in this case we have CSV file which contains following columns:

#	Abc	Abc	Abc	#	⊕	Abc	Abc	#
UK-Bank-Customer...	UK-Bank-Cust...	UK-Bank-Custom...	UK-Bank-Custo...	UK-Bank...	UK-Bank-Customer...	UK-Bank-Customers.c...	UK-Bank-Customers....	UK-Bank-Cust...
Customer ID	**Name**	**Surname**	**Gender**	**Age**	**Region**	**Job Classifica...**	**Date Joined**	**Balance**
100000001	Simon	Walsh	Male	21	England	White Collar	05.Jan.15	113,810.15
400000002	Jasmine	Miller	Female	34	Northern Ireland	Blue Collar	06.Jan.15	36,919.73
100000003	Liam	Brown	Male	46	England	White Collar	07.Jan.15	101,536.83

2) Load the data into Tableau, now it will be visible in the Data Source tab.

3) For getting the bank customers regions, select Region Column and change its geographical roles as State/province. Then add it on the Sheet.
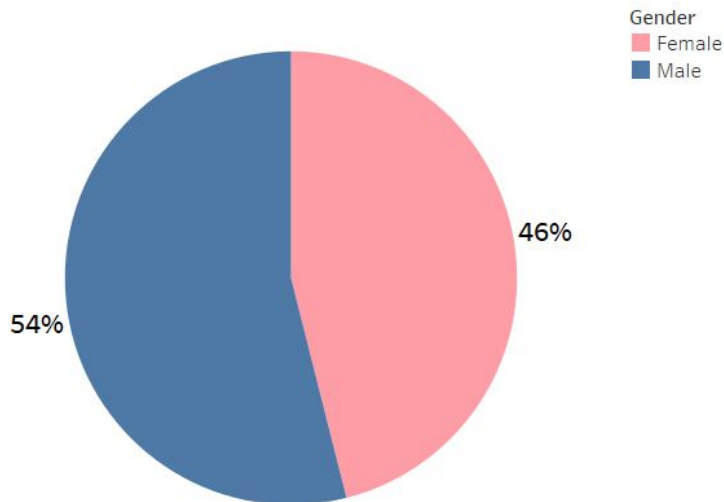
4) Add the same region into details for colorful visualisation on the map.

Here, Map chart of region:
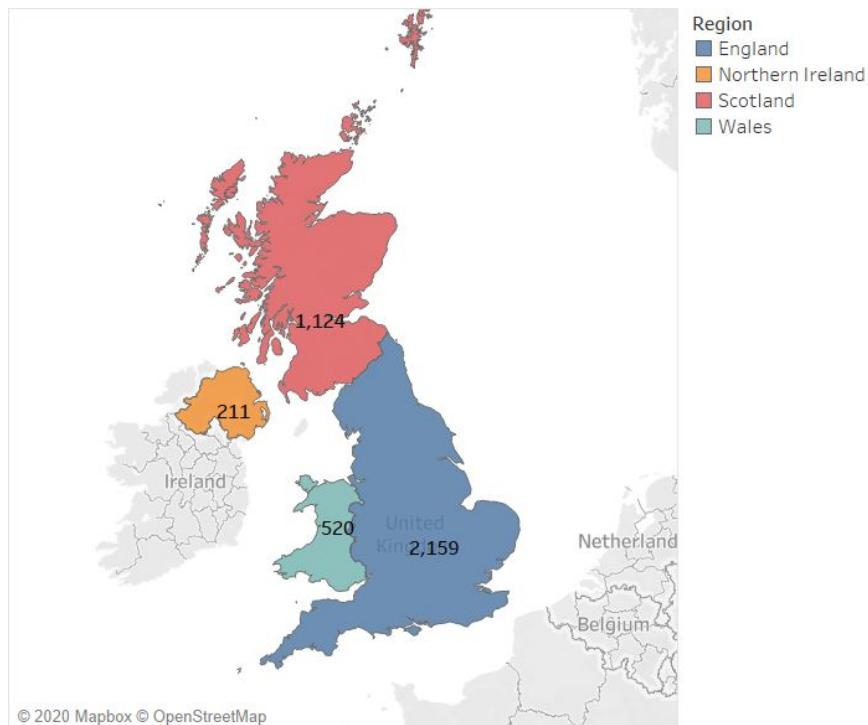
5) Now for visualization to portray the gender split in the customer base, we are going to use a Pie Chart.

6) Add a Pie Chart from 'Show Me' with Gender and Customer Record (Count) and set it to percentage of total.
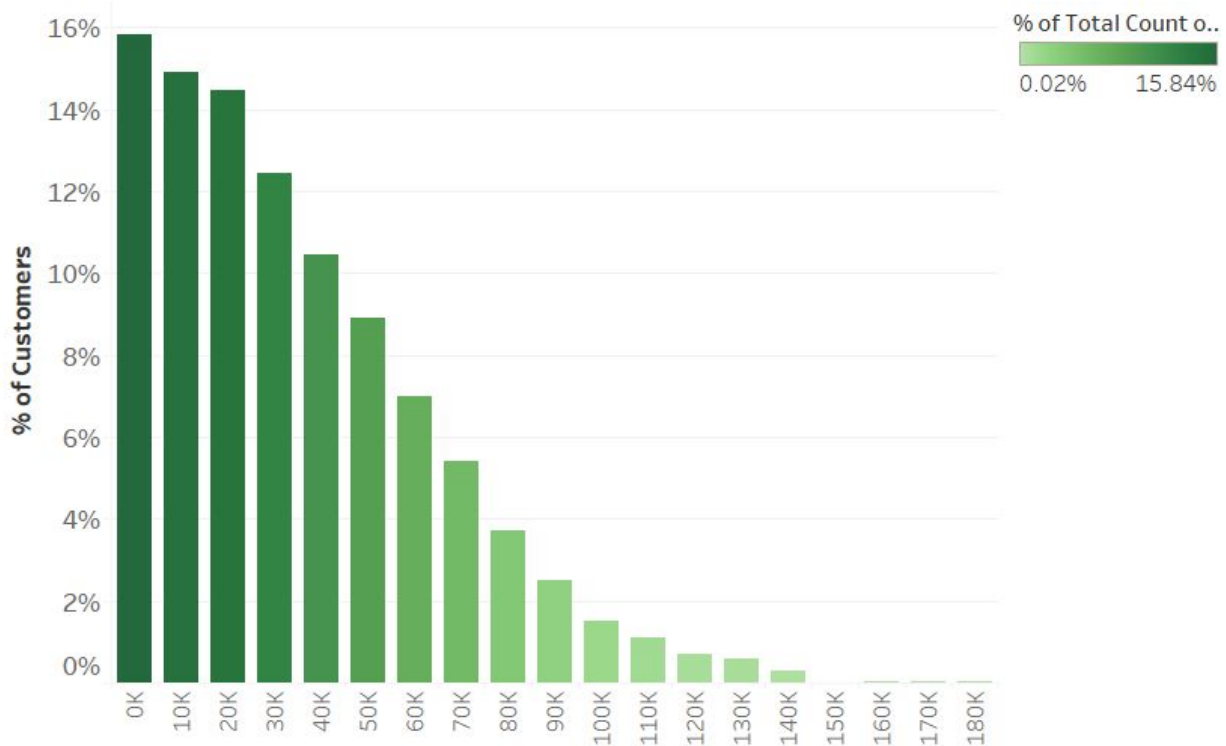

7) Now, for creating Bins (groups) for proper age distribution visual just right-click on Age and create Bins, set to 5.

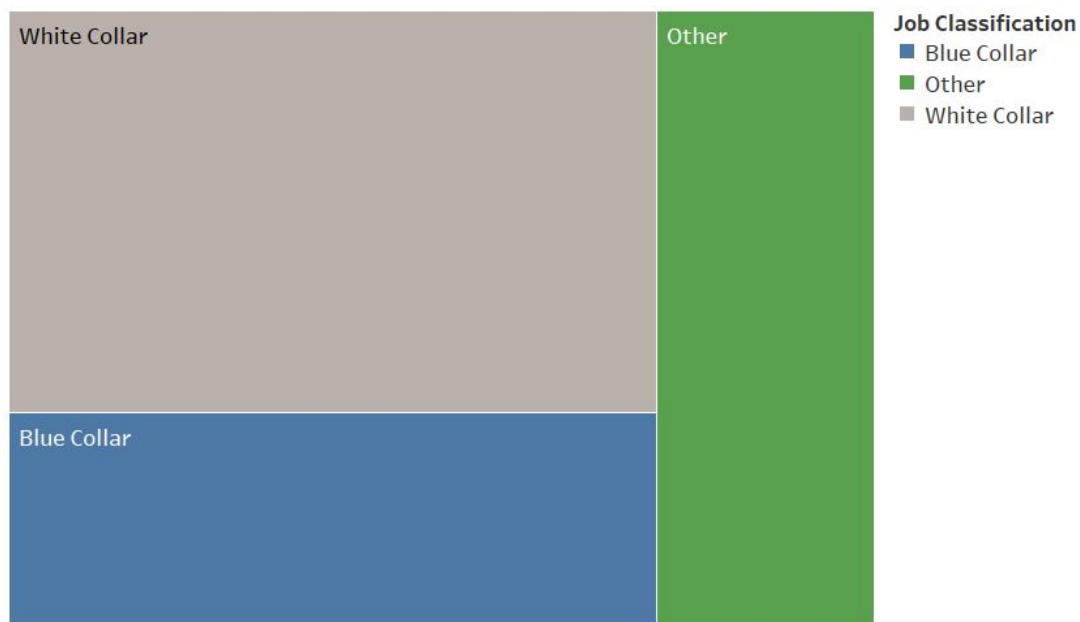> Then put Age (bin) in Column and Customer Record (count) in Rows.
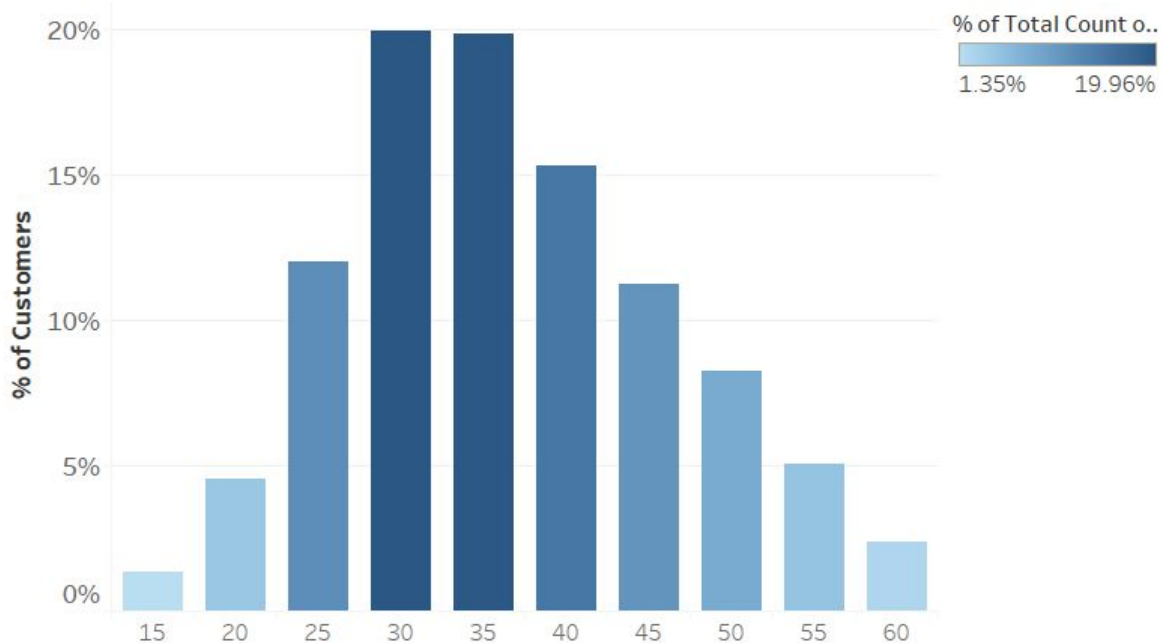
8) For creating Bins (groups) for Balance distribution visual just right-click on Balance and create Bins, set to 10000.
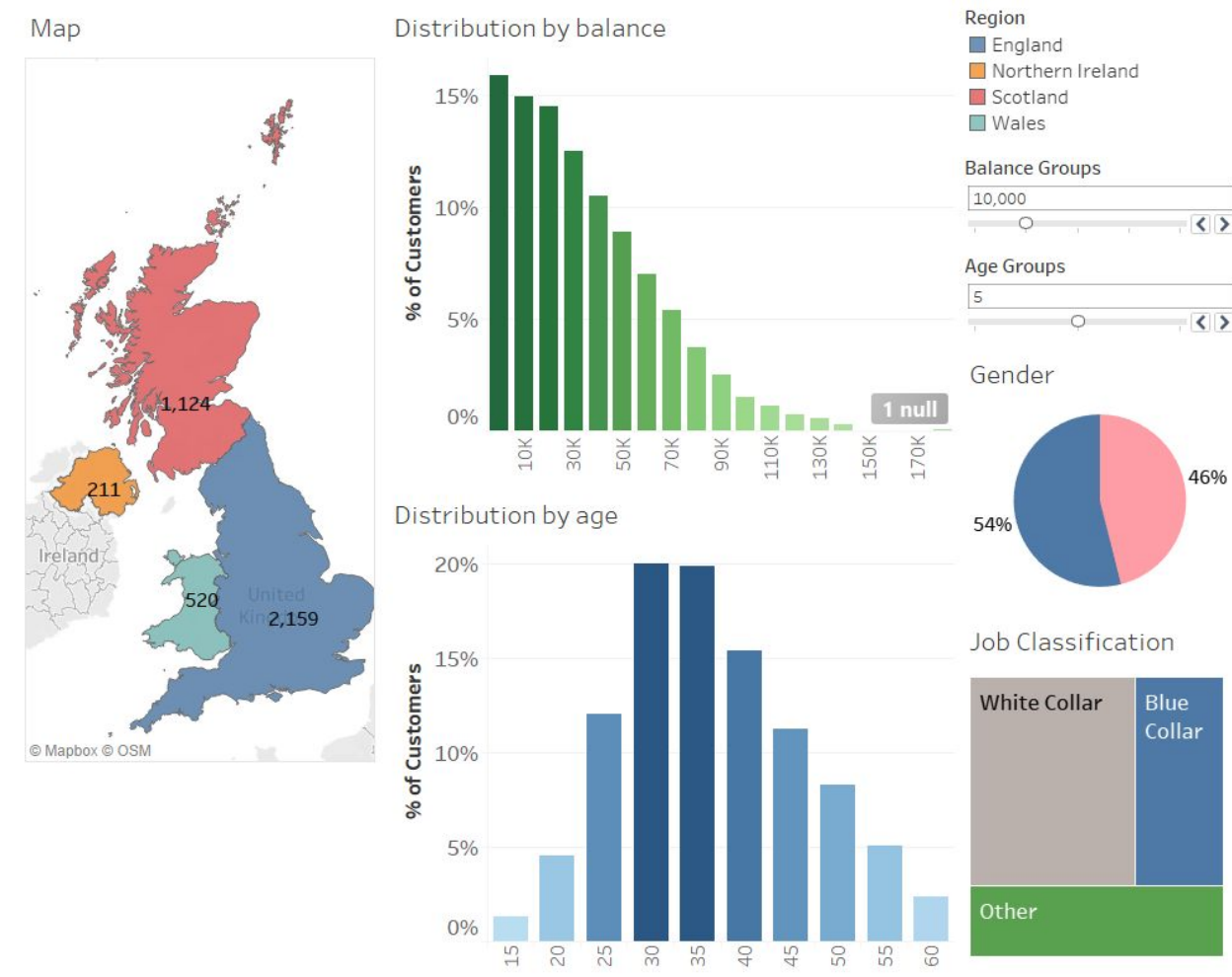
> Then put Balance (bin) in Column and Customer Record (count) in Rows.

9) Select a Tree map for portraying Job Classifications:

10) Now, we need to create a Dashboard and add all above sheets on the dashboard:
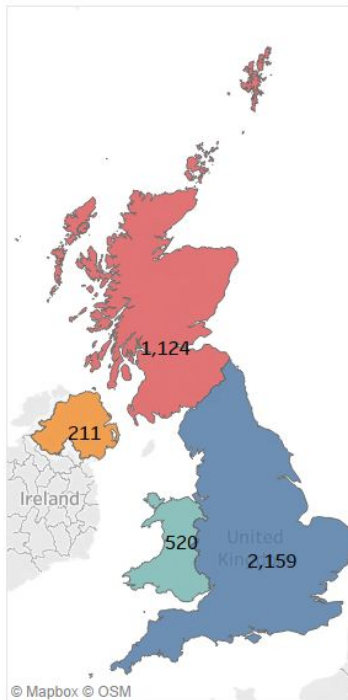
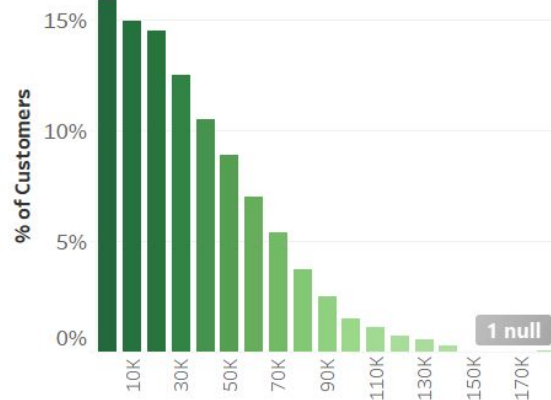11) Creating a Storyline for the dashboard:
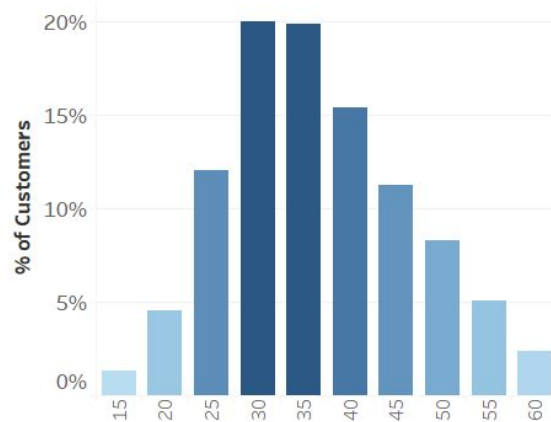
> This bank's customer base line.

Story

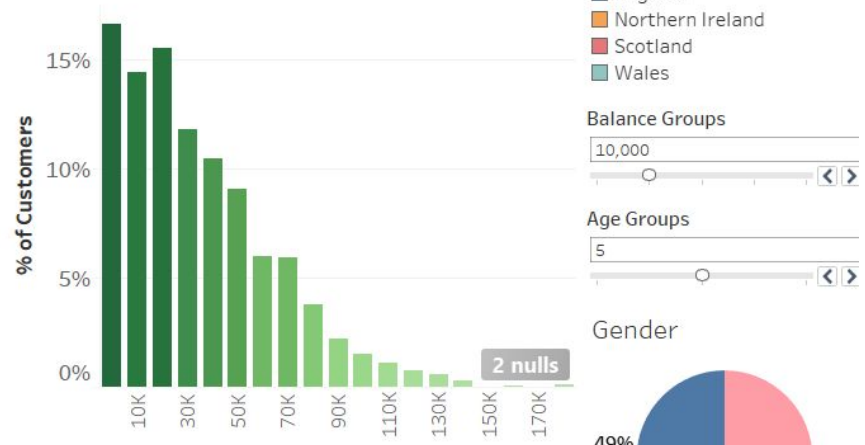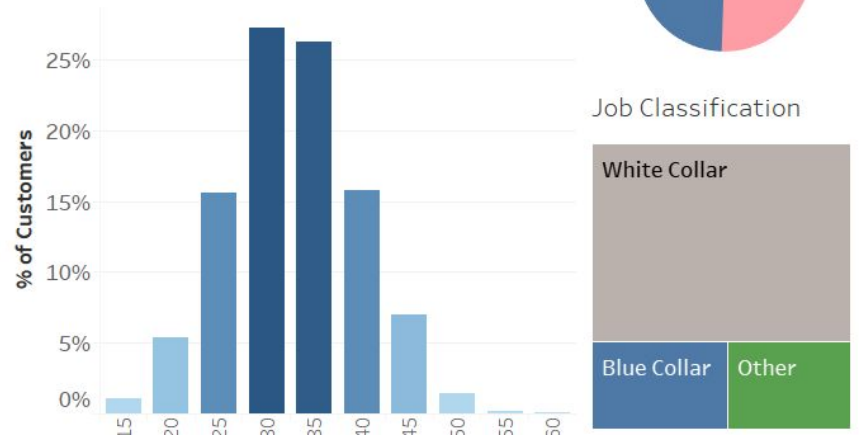| This bank's customer base line.	England is mostly represented by	Customers in Scotland are	Data for Wales shows an above	Northern Ireland is mostly represented
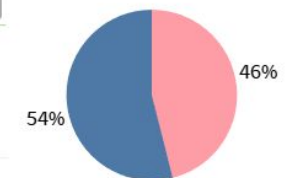
> England is mostly represented by white collar workers 70 percent.

Story

Map

Distribution by balance

Distribution by age

Region
- England
- Northern Ireland
- Scotland
- Wales

Balance Groups
10,000

Age Groups
5

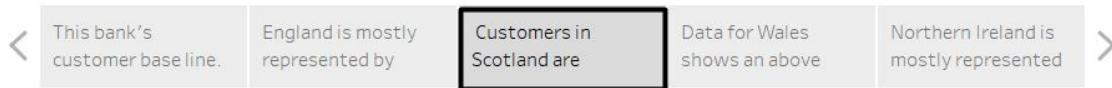### Gender

49% 51%

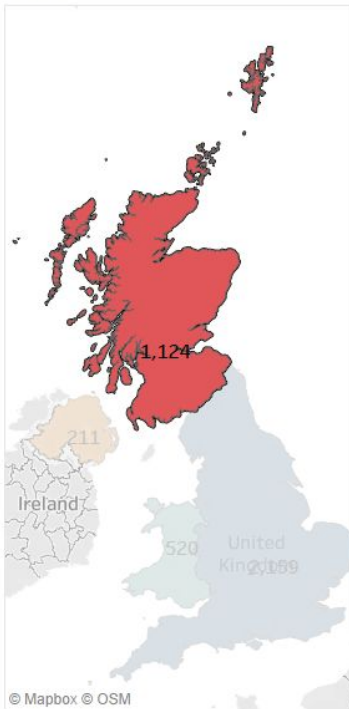### Job Classification

White Collar

Blue Collar   Other
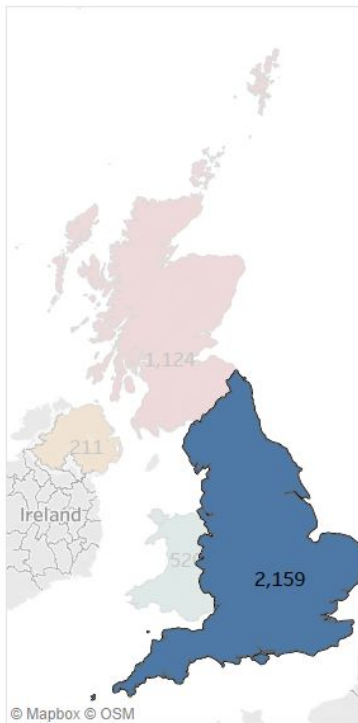
> Customers in Scotland are predominantly males in their late 40s and early 50s late 40s and early 50s.Representation of white collar workers is low.
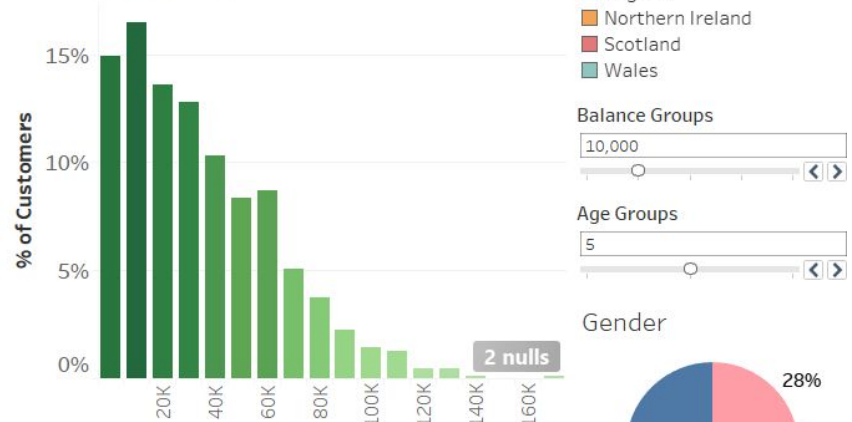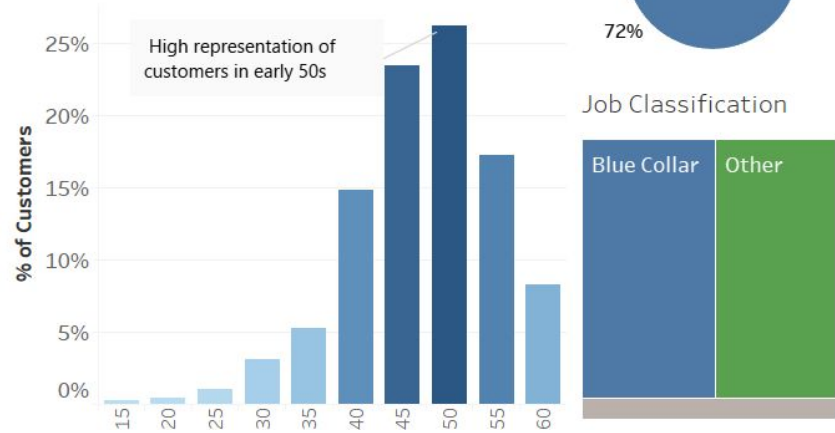
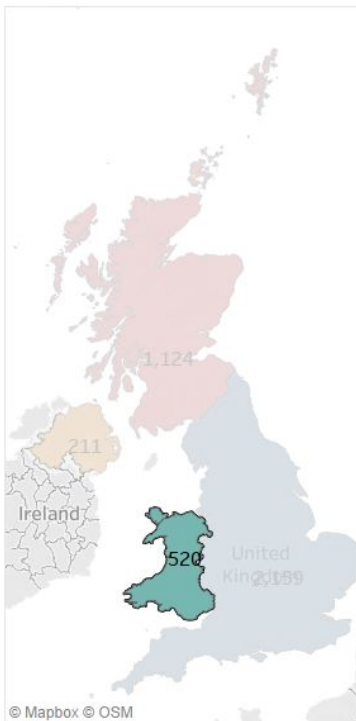## Story

Map

Distribution by balance

Distribution by age

High representation of customers in early 50s

Region
- England
- Northern Ireland
- Scotland
- Wales

Balance Groups
10,000

Age Groups
5

Gender

28%

72%

Job Classification

Blue Collar | Other

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Kapil Valecha | Phone : +91 9479883550
Email id : kapilvalechakv@gmail.com

> Data for Wales shows an above average representation of mid-sized balances.

Story

Map

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1,124

211

Ireland

520

United Kingdom 2,159

Distribution by balance

Above average representation

Distribution by age

Region
- England
- Northern Ireland
- Scotland
- Wales

Balance Groups

15,000

Age Groups

5

Gender

46%   54%

Job Classification

White Collar   Blue
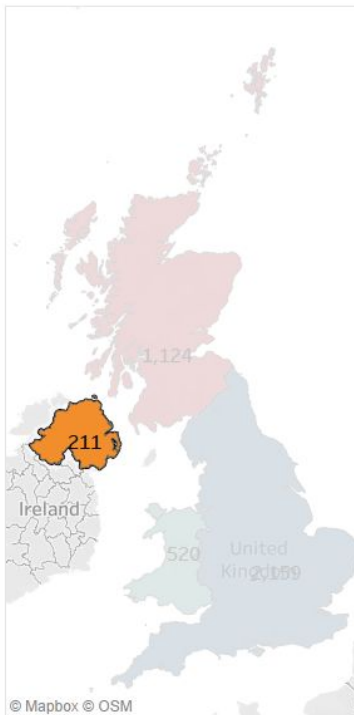
Other
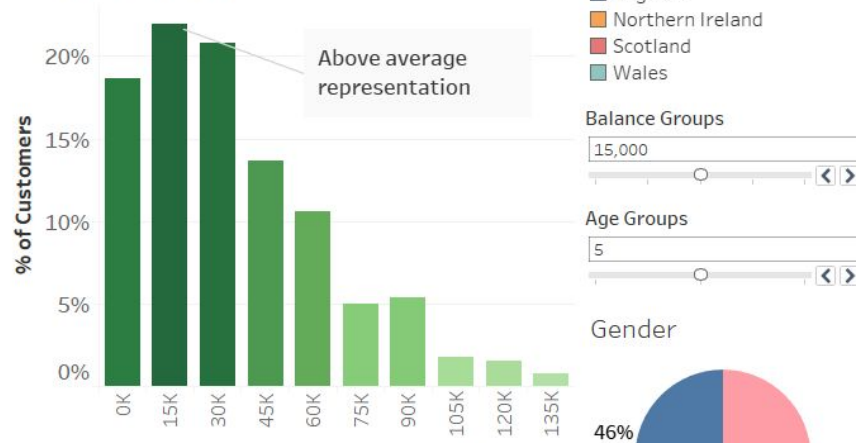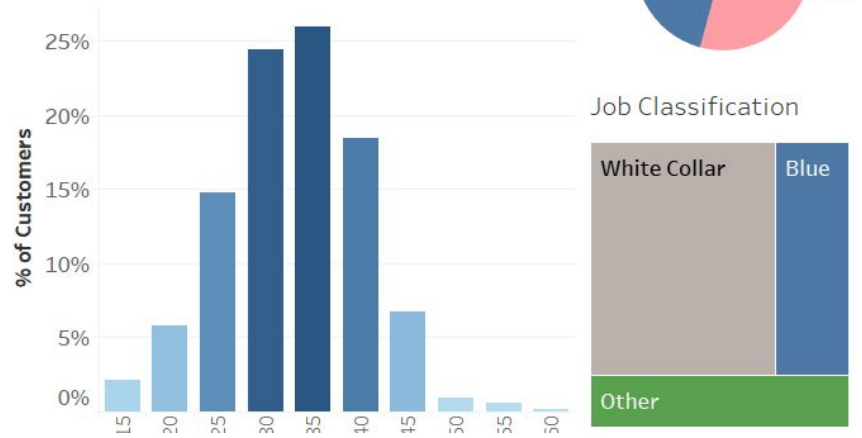
> Northern Ireland is mostly represented by female customers in younger age groups.

Story

Map

Distribution by balance

Distribution by age

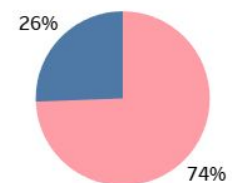**Region**
- England
- Northern Ireland
- Scotland
- Wales

Balance Groups
15,000

Age Groups
5

Gender
26%
74%

Job Classification
Other | White Collar
Blue Collar

Kapil Valecha | Phone : +91 9479883550
Email id : kapilvalechakv@gmail.com