

Project 2. KPMG Data Analysis using Excel

1. Summary of Key Insights
Customer Segmentation
Wealth Segment: The majority of customers belong to the <i>Mass Customer</i> segment, but <i>High Net Worth</i> customers have the highest average tenure and CLV.
Gender: Male and female customers are nearly evenly distributed. Males show slightly higher average purchases over the past 3 years.
Job Industry: Customers in <i>Financial Services</i> , <i>IT</i> , and <i>Health</i> industries tend to have higher purchase activity and longer tenure.
Transaction Analysis
Sales Trends: Sales peak in Q4, indicating strong seasonal demand—likely due to holiday promotions or end-of-year campaigns.
Top Brands: <i>Solex</i> and <i>WeareA2B</i> are the most purchased brands, contributing significantly to total revenue.
Product Lines: <i>Standard</i> and <i>Road</i> product lines dominate in both volume and revenue.
New Customer Insights
Demographics: New customers are primarily from <i>Mass Customer</i> and <i>Affluent</i> segments, with a strong presence in <i>Retail</i> and <i>Health</i> industries.
Location: Most new customers are located in <i>New South Wales</i> and <i>Victoria</i> , suggesting regional growth potential.
Potential Value: High-ranking new customers show strong purchase potential based on their past 3-year purchase behavior and property valuation.
CLV Analysis
High CLV Segments: Customers with longer tenure, higher APV, and from <i>High Net Worth</i> segments contribute the most to lifetime value.
Demographic Correlation: CLV is positively correlated with tenure, wealth segment, and job industry—especially <i>Financial Services</i> and <i>IT</i> .
2. Recommendations
A. Marketing Strategies for High-Value Customer Segments
Target High Net Worth and Affluent Customers with personalized loyalty programs, early product access, and premium service bundles.

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Segment campaigns by job industry —especially for <i>Finance</i> and <i>IT</i> professionals—using tailored messaging and exclusive offers.
Retain top CLV customers with referral incentives, milestone rewards, and VIP experiences.
B. Business Expansion Opportunities
Focus on New South Wales and Victoria for regional expansion, as these states have the highest concentration of high-value new customers.
Use property valuation data to identify affluent neighborhoods for targeted campaigns, pop-up stores, or local partnerships.
Explore underserved states with moderate property valuation but high customer interest for potential growth.
C. Product Offering Improvements
Expand successful product lines like <i>Standard</i> and <i>Road</i> with new variants, accessories, or bundled offers.
Introduce mid-tier options under top-performing brands like <i>Solex</i> to attract Mass Customers while maintaining brand loyalty.
Plan inventory and promotions around Q4 demand spikes to maximize seasonal revenue.

Video link: <https://www.loom.com/share/d4cffdca3c89439dad8b7a83f4e1cdad?sid=d493cee4-6744-49ab-a8ea-6928d682c5c0>

Excel sheet :

<https://docs.google.com/spreadsheets/d/1oVpfbCtG7WvGfckHqUZxsGsemcs3BzpR/edit?usp=sharing&ouid=116124799172851730572&rtpof=true&sd=true>