

Here's a clean, structured walkthrough you can follow to build an Excel dashboard from your uploaded customer-segmentation dataset — plus practical Copilot-in-Excel prompts you can use at each stage to speed things up.

1. Upload the Excel File into Excel

Steps

1. Open Excel.
2. Select **Open** → **Browse**.
3. Choose your **.xlsx** file (or import the CSV and save as Excel).
4. Once opened, ensure the data is formatted as a **Table**:
 - Select any cell → **Ctrl + T** → check “My table has headers.”

Copilot prompts

- “Convert this sheet into a formatted table and clean any obvious issues.”
 - “Identify missing values in this dataset and suggest fixes.”
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2. Clean & Prepare the Data

Your dataset includes missing values in columns like **Profession**, **Work_Experience**, and **Var_1**. Excel can handle this with Power Query or formulas.

Steps

1. Go to **Data** → **Get Data** → **From Table/Range** to open Power Query.
2. Use:
 - **Remove Rows** → **Remove Blank Rows**
 - **Transform** → **Replace Values** (e.g., replace blanks with “Unknown”)
 - **Change Data Type** (Age → Whole Number, Spending_Score → Text)
3. Close & Load back to Excel.

Copilot prompts

- “Analyze this table and tell me which columns have missing or inconsistent values.”
 - “Suggest the best way to standardize categorical fields like Profession and Var_1.”
 - “Create a new calculated column grouping Age into ranges (18–30, 31–45, 46–60, 60+).”
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3. Create PivotTables for Dashboard Metrics

You’ll build PivotTables for key metrics like:

| Metric | Example Pivot Setup |
|-----------------------------|--|
| Customer count by Segment | Rows: Segmentation; Values: Count of ID |
| Average Age by Segment | Rows: Segmentation; Values: Average of Age |
| Spending Score distribution | Rows: Spending_Score; Values: Count of ID |
| Profession breakdown | Rows: Profession; Values: Count of ID |
| Family size averages | Rows: Segmentation; Values: Average of Family_Size |

Steps

1. Insert → PivotTable → Select your table.
2. Place each PivotTable on a new sheet or arrange them on a dashboard sheet.
3. Format PivotTables for readability.

Copilot prompts

- “Create PivotTables that summarize customer segmentation, spending score, and profession distribution.”
 - “Explain which fields in this dataset are most useful for customer segmentation analysis.”
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4. Add PivotCharts

Charts make the dashboard dynamic and visual.

Recommended charts

- **Bar chart:** Customer count by Segmentation
- **Pie chart:** Gender distribution
- **Column chart:** Spending Score categories
- **Tree map:** Profession distribution
- **Line chart:** Average Age by Segment

Steps

1. Select a PivotTable → Insert → PivotChart.
2. Choose chart type.
3. Move charts to your dashboard sheet.

Copilot prompts

- “Recommend the best chart types for visualizing segmentation patterns in this dataset.”
 - “Format these charts with consistent colors and titles for a dashboard.”
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5. Add Slicers & Timelines

Slicers make your dashboard interactive.

Useful slicers for this dataset

- Gender
- Ever_Married
- Profession
- Spending_Score
- Segmentation

Steps

1. Select a PivotTable.
2. Insert → Slicer.

3. Choose fields.
4. Connect slicers to all PivotTables:
 - Slicer → Report Connections → Check all PivotTables.

Copilot prompts

- “Add slicers for Gender, Profession, and Segmentation and connect them to all PivotTables.”
 - “Explain which slicers would make this dashboard most interactive.”
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6. Build the Dashboard Layout

Steps

1. Create a new sheet named **Dashboard**.
2. Move charts and slicers onto the sheet.
3. Arrange them using:
 - **Align** → **Distribute Horizontally/Vertically**
 - **Format** → **Shape Styles** for slicers
4. Add titles and section headers.

Copilot prompts

- “Design a clean dashboard layout using the charts and slicers already created.”
 - “Suggest a color theme that fits a customer analytics dashboard.”
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7. Add KPIs (Optional but Powerful)

Examples you can compute:

- Total customers
- % High spenders
- Average age
- Top 3 professions
- Segment with highest family size

Steps

1. Use formulas like:
 - `=COUNTA(Table1[ID])`
 - `=AVERAGE(Table1[Age])`
2. Format KPIs using large text boxes or shapes.

Copilot prompts

- “Generate KPI formulas for total customers, average age, and high-spending customers.”
 - “Summarize the top insights from this dataset in 3–5 bullet points.”
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8. Final Polish

Steps

- Add a dashboard title.
- Group slicers.
- Lock the layout (Review → Protect Sheet).
- Add notes or definitions if needed.

Copilot prompts

- “Write a short dashboard description explaining what each chart shows.”
 - “Suggest insights based on the segmentation patterns in this dataset.”
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Recommended Excel Dashboard Structure for Your Dataset

Your dataset includes fields like:

- **Segmentation** (A, B, C, D)
- **Spending_Score** (Low, Average, High)
- **Profession**
- **Gender**

- **Ever_Married**
- **Age**
- **Family_Size**
- **Var_1** (categorical code)
- **Work_Experience**

These are perfect for a customer-insights dashboard.

1. Dashboard Title Area

At the top of the sheet:

Title:

Customer Segmentation Dashboard

Subtitle:

“Demographic, behavioral, and segmentation insights based on customer profiles.”

2. KPI Section (Top Row)

Use 4–6 rectangular KPI cards.

Recommended KPIs

| KPI | Description | Example Formula |
|------------------------|-----------------------------|----------------------------------|
| Total Customers | Count of all IDs | <code>=COUNTA(Table1[ID])</code> |
| % High Spenders | High spending score / total | Pivot or COUNTIF |

| | | |
|-------------------------------|-----------------------------|--|
| Average Age | Mean age | <code>=AVERAGE(Table1[Age])</code> |
| Most Common Profession | Mode of Profession | Pivot or Power Query |
| Largest Segment | A/B/C/D with most customers | Pivot |
| Average Family Size | Mean family size | <code>=AVERAGE(Table1[Family_Size])</code> |

Copilot prompts

- “Create KPI formulas for total customers, average age, and percentage of high-spending customers.”
 - “Identify the top three professions in this dataset and summarize them.”
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3. Segmentation Overview (Left Column)

Chart 1: Customer Count by Segment

- **Chart type:** Column or bar chart
- **Pivot setup:**
 - Rows: Segmentation
 - Values: Count of ID

Chart 2: Average Age by Segment

- **Chart type:** Line or bar
- **Pivot setup:**
 - Rows: Segmentation
 - Values: Average of Age

Copilot prompts

- “Build a PivotTable showing customer count by segment.”
 - “Create a chart comparing average age across segments.”
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4. Spending Behavior (Center Column)

Chart 3: Spending Score Distribution

- **Chart type:** Column or donut
- **Pivot setup:**
 - Rows: Spending_Score
 - Values: Count of ID

Chart 4: Spending Score by Profession

- **Chart type:** Stacked bar or clustered bar
- **Pivot setup:**
 - Rows: Profession
 - Columns: Spending_Score
 - Values: Count of ID

Copilot prompts

- “Visualize spending score distribution using a PivotChart.”
 - “Show how spending score varies across professions.”
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5. Demographics (Right Column)

Chart 5: Gender Breakdown

- **Chart type:** Pie or donut
- **Pivot setup:**
 - Rows: Gender
 - Values: Count of ID

Chart 6: Marital Status vs. Segmentation

- **Chart type:** Clustered column

- **Pivot setup:**
 - Rows: Ever_Married
 - Columns: Segmentation
 - Values: Count of ID

Chart 7: Age Distribution

- **Chart type:** Histogram
- **Data:** Age column
- **Bins:** 18–30, 31–45, 46–60, 60+

Copilot prompts

- “Create a histogram of customer ages using appropriate bins.”
 - “Build a chart showing segmentation by marital status.”
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6. Slicers (Right Side or Top Row)

Recommended slicers

- Segmentation
- Spending_Score
- Gender
- Profession
- Ever_Married

Copilot prompts

- “Add slicers for Segmentation, Gender, and Profession and connect them to all PivotTables.”
 - “Format slicers to match a clean dashboard theme.”
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7. Optional Advanced Elements

A. Age Grouping

Create a new column:

- 18–30
- 31–45
- 46–60
- 60+

Copilot prompt:
“Create a new column that groups Age into ranges: 18–30, 31–45, 46–60, and 60+.”

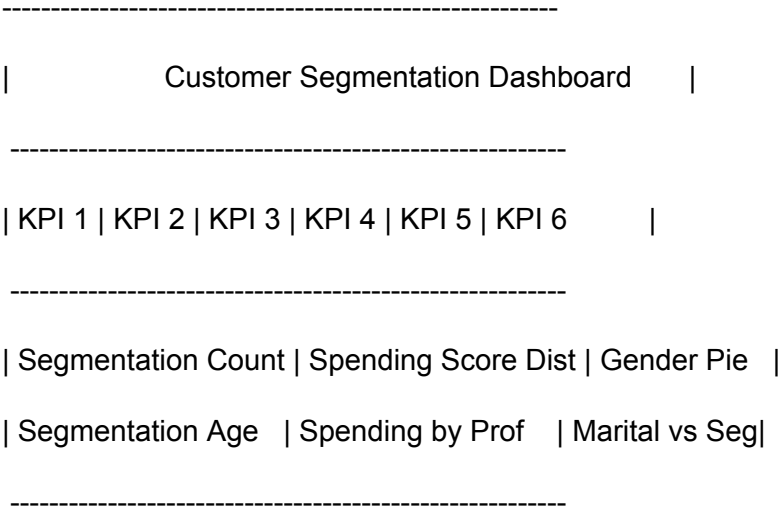
B. Customer Personas

Based on patterns in your data, you can create personas like:

- **Segment A:** Younger, low spending, healthcare-heavy
- **Segment B:** Middle-aged, average spending, artists and executives
- **Segment C:** Older, high spending, lawyers and doctors
- **Segment D:** Mixed ages, low spending, entertainment and healthcare

Copilot prompt:
“Summarize customer personas for each segment based on age, profession, and spending score.”

8. Suggested Dashboard Layout (Visual Map)



| Age Histogram | Slicers (right side) |

If you want, I can also **generate a ready-to-use dashboard layout template** (titles, chart placeholders, KPI boxes) that you can paste directly into Excel.