# **Follow-up Assessment: Building a Dashboard**

## **Scenario:**

You have successfully completed the initial analysis for Valley Bank, segmenting customers based on transaction behavior and demographics. Your next task is to create a dashboard in **Power BI** (**preferred**) or Tableau that visualizes key performance indicators (KPIs) derived from the analysis.

## Instructions:

Your primary task is to connect the existing database directly to Power BI to integrate the necessary data. Then, design and build a dashboard in Power BI that incorporates the following KPIs:

1. Database Connection: Establish a direct connection from Power BI to the relational database where the transaction, customer data and account profile is stored.
2. Segment Distribution: Visualize the distribution of customers across different segments identified in the analysis.

## Required KPIs

1. Average Transaction Amount: Determine and represent the average transaction amount per customer within each segment.
2. Transaction Frequency: Calculate and visualize the average number of transactions per customer within each segment.
3. Age and Salary Data: While not included as standalone KPIs in the dashboard, incorporate age and salary data into your analysis to provide deeper insights into customer demographics and behavior.
4. You're encouraged to showcase any additional insights or interesting findings resulting from your analysis. But ensure that the dashboard remains clear and straightforward.

## Deliverables:

1. Power BI Dashboard:
   1. Submit the Power BI dashboard file (.pbix).
   2. If feasible, consider publishing the dashboard online
2. Documentation
   1. Provide a brief diagram of data model
   2. Document any assumptions made, or data transformations performed
   3. Include instructions on how to interact with the dashboard (if necessary)