iNeuron

High-Level Design (HLD)

Bank Marketing Analytics

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Contents

Abstract

The project analyzes the prior marketing campaign data of a Portuguese bank and aims to provide the key findings for the next marketing campaign to predict whether the customer will subscribe to fixed-term deposit products the bank is offering. The main goal here is to analyze the past record and find a meaningful relationship between different attributes. This analysis will help management to launch the next campaign to target the relevant customers. By combining all strategies and simplifying the market audience the next campaign should address, it is likely that the next marketing campaign of the bank will be more effective than the current one. A Term Deposit is a deposit that a bank or a financial institution offers with a fixed rate (often better than just opening a deposit account) in which your money will be returned at a specific maturity time.

1 Introduction

1.1 Why this High-Level Design Document?

The purpose of this High-Level Design (HLD) document is to add the necessary detail to the current project description to represent a suitable model for coding. This document is also intended to help detect contradictions before coding and can be used as a reference manual for how the modules interact at a high level.

The HLD will:

- Present all of the design aspects and define them in detail
- Describe the user interface is implemented
- Describe the hardware and software interfaces
- Describe the performance requirements
- Include design features and the architecture of the project •
- List and describe the non-functional attributes like:
  - o Security
  - o Reliability
  - o Maintainability
  - o Portability
  - o Reusability
  - o Application compatibility
  - o Resource utilization
  - o Serviceability

1.2 Scope

The HLD documentation presents the structure of the system, such as the database architecture, application architecture (layers), application flow (Navigation), and technology architecture. The HLD uses non-technical to mildly-technical terms which should be understandable to the administrators of the system.

2 General Description

2.1 Product Perspective & Problem Statement

Housing prices are an important reflection of the economy, and housing price ranges are of great interest to both buyers and sellers. In this project, house prices will be predicted given explanatory variables that cover many aspects of residential houses. The objective of the project is to perform data visualization techniques to understand the insight of the data. This project aims to apply various Business Intelligence tools such as Tableau or Power BI to get a visual understanding of the data.

2.2 Tools used

Business Intelligence tools and libraries work such as Numpy, Pandas, Excel, R, Tableau, Power BI are used to build the whole framework.
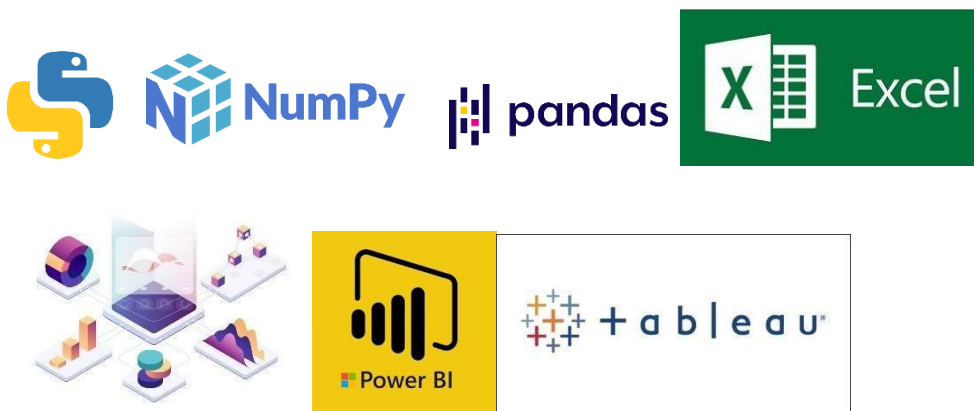
3 Design Details

3.1 Functional Architecture
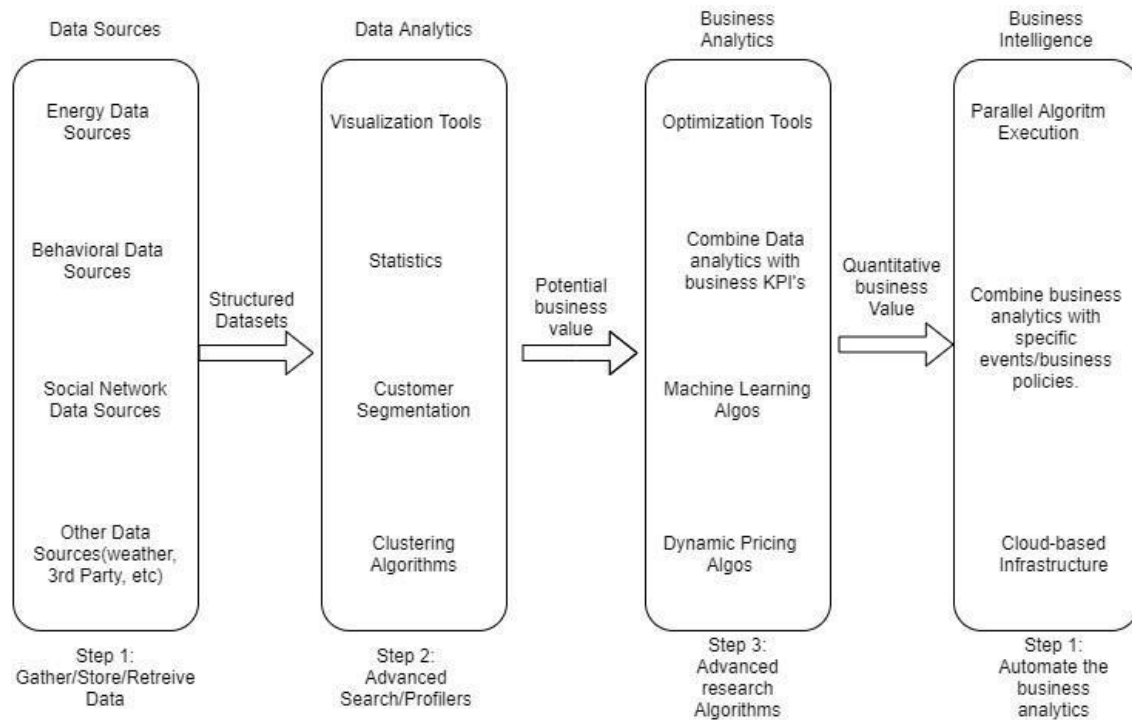
Figure 1: Functional Architecture of Business Intelligence

How BI Really Works

Organizational Memory	Information Integration	Insight Creation	Presentation
• Data Warehouse • ERP • Knowledge Repository • CMS • DMS	• Business Analytics Tool • Data Mining • Real-time Decision	• Text mining tools • Web mining tools • Environmental Scanning • RFID	• OLAP Tools • Visualization tools • Digital Dashboards • Score Card
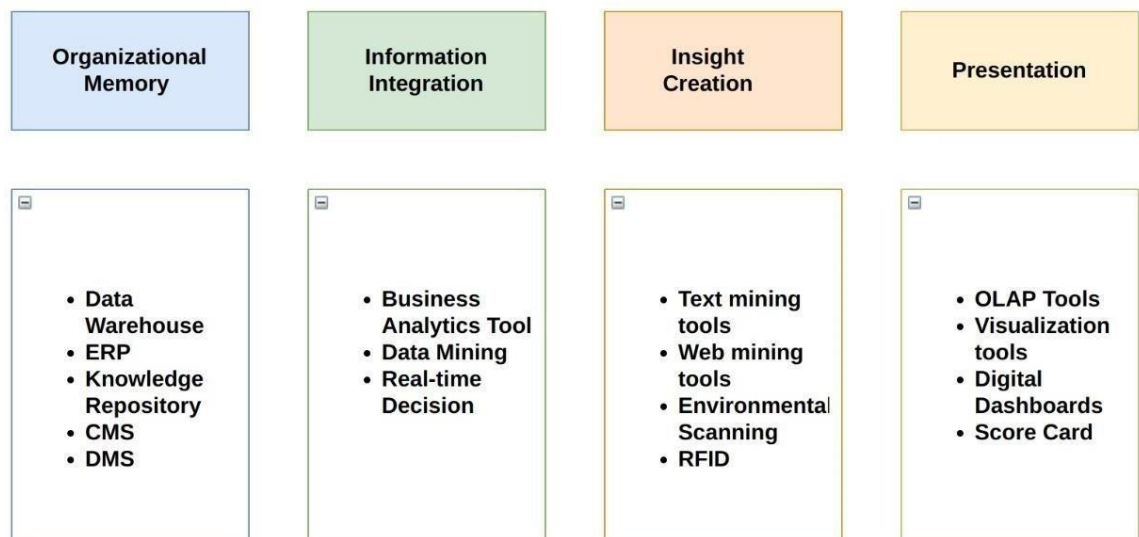
3.2 Optimization

Your data strategy drives performance

- Minimize the number of fields
- Minimize the number of records
- Optimize extracts to speed up future queries by materializing calculations, removing columns and the use of accelerated views

Reduce the marks (data points) in your view

- Practice guided analytics. There's no need to fit everything you plan to show in a single view. Compile related views and connect them with action filters to travel from overview to highly-granular views at the speed of thought.
- Remove unneeded dimensions from the detail shelf.
- Explore. Try displaying your data in different types of views. **Limit your filters by**

  number and type

- Reduce the number of filters in use. Excessive filters on a view will create a more complex query, which takes longer to return results. Double-check your filters and remove any that aren't necessary.

- Use an include filter. Exclude filters load the entire domain of a dimension while including filters do not. An include filter runs much faster than an exclude filter, especially for dimensions with many members.

- Use a continuous date filter. Continuous date filters (relative and range-of-date filters) can take advantage of the indexing properties in your database and are faster than discrete data filters.

- Use Boolean or numeric filters. Computers process integers and Booleans (t/f) much faster than strings.

- Use parameters and action filters. These reduce the query load (and work across data sources).

Optimize and materialize your calculations

- Perform calculations in the database

- Reduce the number of nested calculations.

- Reduce the granularity of LOD or table calculations in the view. The more granular the calculation, the longer it takes.
  - LODs - Look at the number of unique dimension members in the calculation.
  - Table Calculations - the more marks in the view, the longer it will take to calculate.

- Where possible, use MIN or MAX instead of AVG. AVG requires more processing than MIN or MAX. Often rows will be duplicated and display the same result with MIN, MAX, or AVG.

- Make groups with calculations. Like include filters, calculated groups load only named members of the domain, whereas Tableau's group function loads the entire domain.

- <u>Use Booleans or numeric calculations instead of string calculations</u>. Computers can process integers and Booleans (t/f) much faster than strings.
  Boolean>Int>Float>Date>DateTime>String

4 KPIs

Dashboards will be implemented to display and indicate certain KPIs and relevant indicators for the disease.

As and when the system starts to capture the historical/periodic data for a user, the dashboards will be included to display charts over time with progress on various indicators or factors

4.1 KPIs (Key Performance Indicators)

Key indicators displaying a summary of the Subscription of the Term-Deposit and its relationship with different metrics.

1. Impact of type of job on the subscription of Term-Deposit.
2. Impact of marital status on the subscription of Term-Deposit.
3. Impact of education on the subscription.
4. Impact of average yearly balance on the subscription.
5. Influence of housing and personal loan on the subscription.
6. Influence of previous campaign.
7. Impact of call duration and contact mode.
8. Impact of month of the year.

5 Deployment

Prioritizing data and analytics couldn't come at a better time. Your company, no matter what size, is already collecting data and most likely analyzing just a portion of it to solve business problems, gain competitive advantages, and drive enterprise transformation. With the explosive growth of enterprise data, database technologies, and the high demand for analytical skills, today's most effective IT organizations have shifted their focus to enabling self-service by deploying and operating Tableau at scale, as well as organizing, orchestrating, and unifying disparate sources of data for business users and experts alike to author and consume content.

Tableau prioritizes choice in flexibility to fit, rather than dictate, your enterprise architecture. Tableau Server and Tableau Online leverage your existing technology investments and integrate them into your IT infrastructure to provide a self-service, modern analytics platform for your users. With on-premises, cloud, and hosted options, there is a version of Tableau to match your requirements. Below is a comparison of the three types:

TYPE PROS CONS

Tableau Server - On-Premises

- Full control of hardware and software
- Infrastructure and data remain behind your firewall
- Need dedicated administrators to manage hardware and software
- The additional infrastructure needed to access off-network (mobile, external)

Tableau Server - Public Cloud (IaaS)

- Full control of software on managed hardware
- Puts infrastructure in the same place as data (for migration to the cloud)
- Flexibility to spin up/down hardware as needed
- Need dedicated administrators to manage software
- The additional infrastructure needed to access off-network (mobile, external)

Tableau Online (SaaS)

- Fully hosted solution (hardware, software upgrades)
- Fast to deploy
- Easy for the external audience to access
- Single-site in a multi-tenant environment
- Cubes are not supported
- No guest account access

Depending on your organizational roles and responsibilities, Tableau Server should be installed by a systems administrator and the designated Tableau Server Administrator in coordination with the appropriate IT roles. For Tableau Online, you will integrate with your existing technology and configure the site settings. The Data & Analytics Survey, completed by business teams, identifies and prioritizes data use cases, audience size, and users. You will use the information collected in both surveys to plan your deployment strategy, including sizing, installation, and configuration of your Tableau Server or integration and configuration of Tableau Online. In addition to installing Tableau Server or configuring Tableau Online, administrators will also need to plan for the client software installation of Tableau Prep Builder, Tableau Desktop, Tableau Mobile, and Tableau Bridge for Tableau Online where applicable.