



Dashboard \ Call Centres Analysis

Last Refresh : 2024-05-26 2:30 AM

Call Centre

12

Advisers

361

Total Applications

3,743,419

App. Converted

19,601

App. Converted

0.52%

Call Centre

Campaigns

Call Centre

All

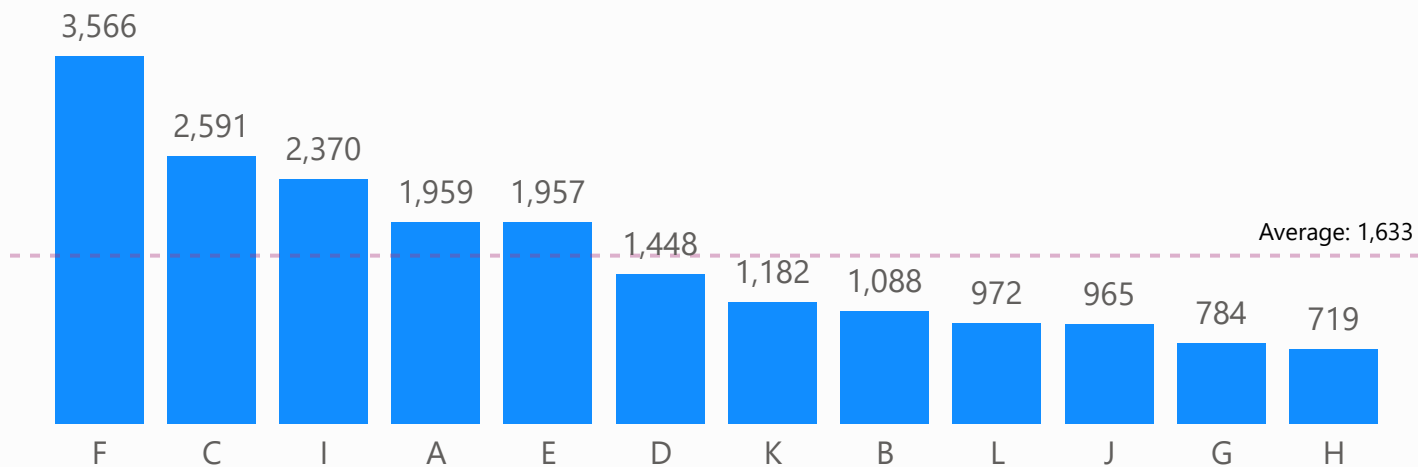


Adviser ID

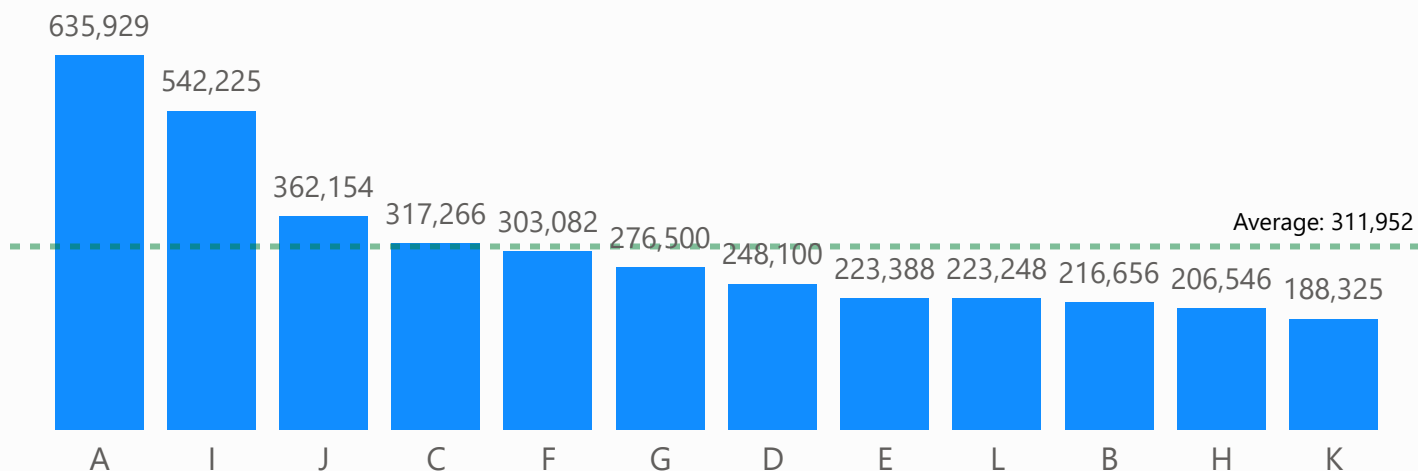
All



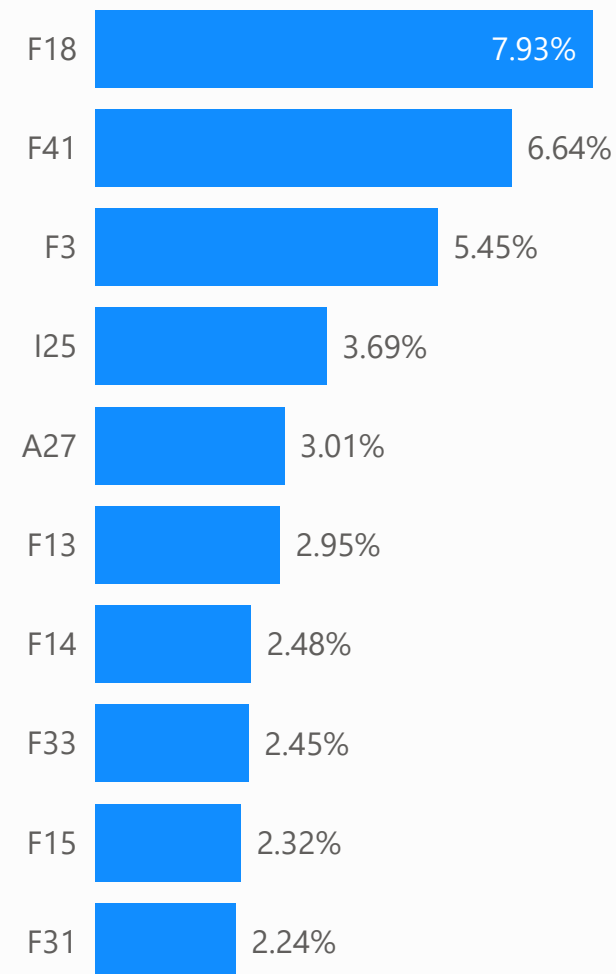
Converted Applications by Call Centre



Total Advisers by Call Centre



Top 10 Advisers by Converted Applications Percentage





Dashboard \ Campaigns Analysis

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Campaigns

376

App. Generated

105,832

App. Interested

38,359

Customer Converted

437.40

Marketing Spend

334.49K

AVG. Customer Value

2,374

Call Centre

Campaigns

Campaign ID

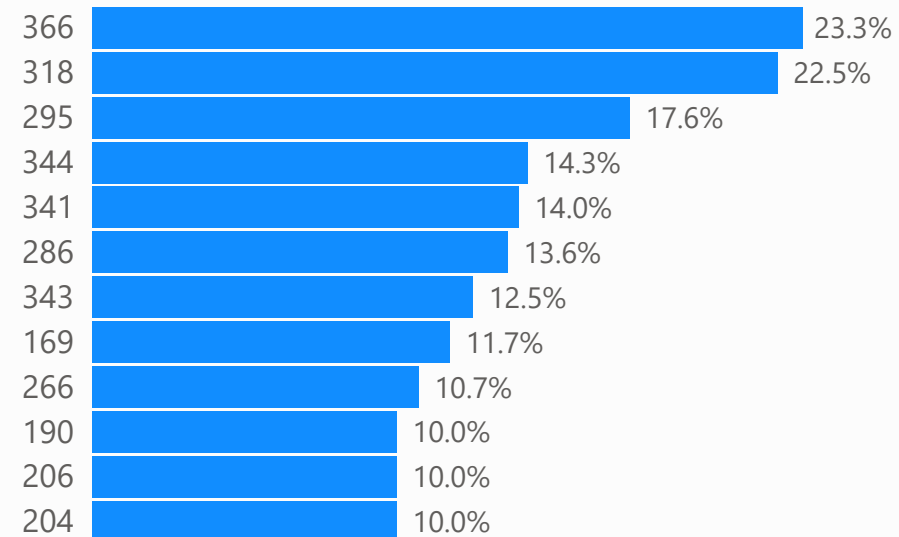
All

Total Generated Applications = 105,832

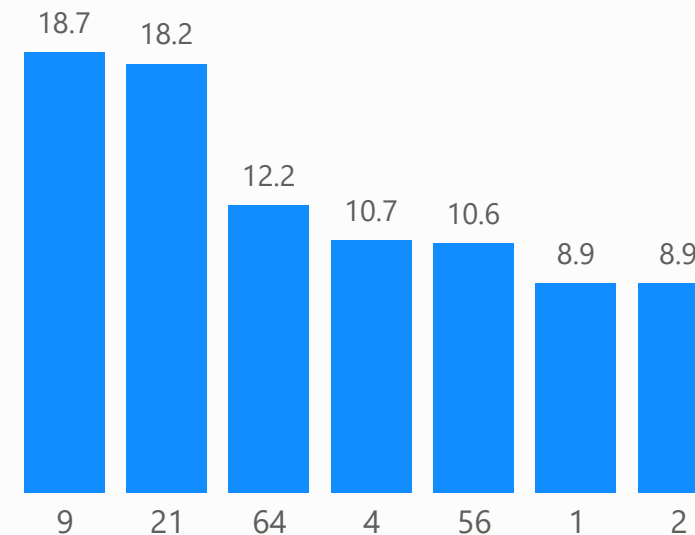
Not Interested = 67,473 63.75%

Interested = 38,359 36.25%

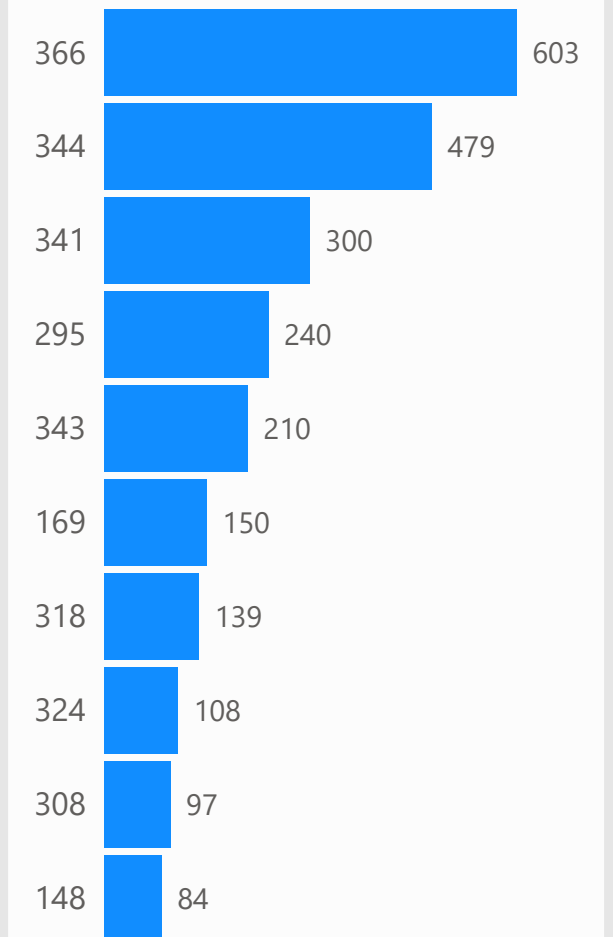
Top 10 Campaigns by Conversion Ratio



Sum of Customers converted by Campaign ID



Return on Investment (ROI) by Campaign ID



Analysis Test Project

Overview of Data Structure:

- **Table 1:** Contains campaign-related data with columns:
 - Campaign
 - Applications generated
 - Applications interested
 - Customers converted
 - Average value of Customers
 - Marketing Spend
- **Table 2:** Contains call centre adviser data with columns:
 - Call Centre
 - Adviser
 - Applications received
 - Applications converted to customers

Key Findings from Data Analysis:

Table 1 (Campaign Data):

1. Applications and Conversions:

- Campaign 1 generated the highest number of applications (7865) and had the most applications interested (2276).
- Campaign 3 had a higher average value of customers (\$7803) but generated fewer applications (2384).

2. Conversion Rates:

- Conversion rate (Customers converted / Applications generated) varies across campaigns. Campaign 4 has a relatively higher conversion rate of 10.7% despite generating fewer applications compared to Campaign 1.

3. Marketing Efficiency:

- The marketing spend varies across campaigns. Campaign 1 has the highest marketing spend (\$13,217.92) while Campaign 4 has a more efficient conversion rate with a lower spend (\$9837.83).

Table 2 (Call Centre Adviser Data):

1. Applications Handling:

- Adviser C14 from Call Centre C received the highest number of applications (68074).
- Several advisers, including Adviser B15 and Adviser J22, received a significant number of applications but had zero conversions to customers.

2. Conversion Performance:

- There is a noticeable gap between applications received and conversions. For instance, Adviser C14 received 68074 applications but only converted 3 to customers, indicating potential inefficiencies in the conversion process.

Recommendations:

1. Campaign Optimization:

- Focus on analyzing the success factors of Campaign 4, which has a higher conversion rate with lower marketing spend, and apply these strategies to other campaigns.
- Re-evaluate the performance of Campaign 1 despite its high application generation. Consider if the high spend justifies the results or if funds could be better allocated.

2. Call Centre Performance Improvement:

- Investigate the performance of advisers who have high application counts but low conversion rates. Provide targeted training or review their processes to improve conversion efficiency.
- Implement a performance tracking system to identify and support underperforming advisers.

3. Enhanced Reporting and Monitoring:

- Regularly monitor and report on both campaign and adviser performance to quickly identify trends, successes, and areas needing improvement.
- Use detailed analytics to understand customer behaviour and preferences to tailor campaigns and adviser training accordingly.

Summary and Recommendations

Summary of Key Findings:

1. Campaign Data:

- Campaign 1 has the highest applications generated and interested but also the highest marketing spend.
- Campaign 4 stands out with a higher conversion rate and lower marketing spend, indicating higher efficiency.

2. Adviser Data:

- Adviser C14 received the most applications but converted only 3 to customers, highlighting a significant inefficiency.
- Several advisers received many applications but had zero conversions.

Recommendations:

1. Optimize Campaign Strategies:

- Analyze the strategies used in Campaign 4 and apply similar methods to other campaigns.
- Consider reallocating marketing funds from less efficient campaigns to those with higher conversion rates.

2. Improve Adviser Performance:

- Provide targeted training and support for advisers with high application counts but low conversions.
- Implement a performance tracking and improvement plan for all advisers to boost overall conversion rates.

3. Enhance Reporting and Monitoring:

- Establish a system for regular monitoring and detailed reporting of both campaign and adviser performances.
- Use analytics to understand customer behaviour better and tailor campaigns and training accordingly.

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