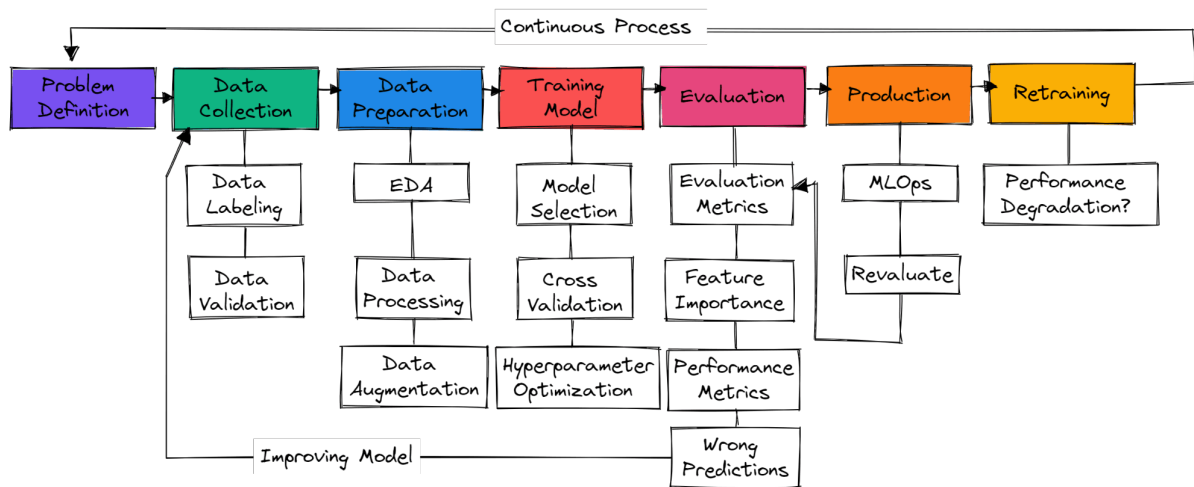# Planning and Coordination

Project Title: easyMoney Data Science Capstone Project
Project Team Members: Gonçalo, Seema, Chukwubuikem
Date: 06/04/2024

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Introduction

The project planning was performed using Trello and the structure was based on the 7 stages of a Data Science Project, plus three personalised phases. Table 1.1 shows the main information about each stage.

Table 1.1 - Stages of our DS Project Planning.

Stage	Schedule	No. Cards
Point of Situation*	01/Mar/24 - 05/Apr/24	4
Report and Dashboards**	02/Mar/24 - 05/Apr/24	5
Problem definition and Planning	03/Feb/24 - 17/Feb/24	6
Data Collection	18/Feb/24 - 21/Feb/24	1
Data Preparation	22/Feb/24 - 02/Mar/24	3
Data Analysis	04/Mar/24 - 13/Mar/24	5
Model Building	15/Mar/24 - 29/Mar/24	10
Model Evaluation	26/Mar/24 - 01/Apr/24	7
Model deployment	03/Apr/24 - 05/Apr/24	2
Monitoring**	25/Mar/24 - 02/Apr/24	2

* Used to plan meetings to discuss the points of the situation when needed.
** Define dates for writing the report and create dashboards.
*** Define the KPIs required to monitor the ML model.

The next chapters show some images as examples of each planning stage of the project.
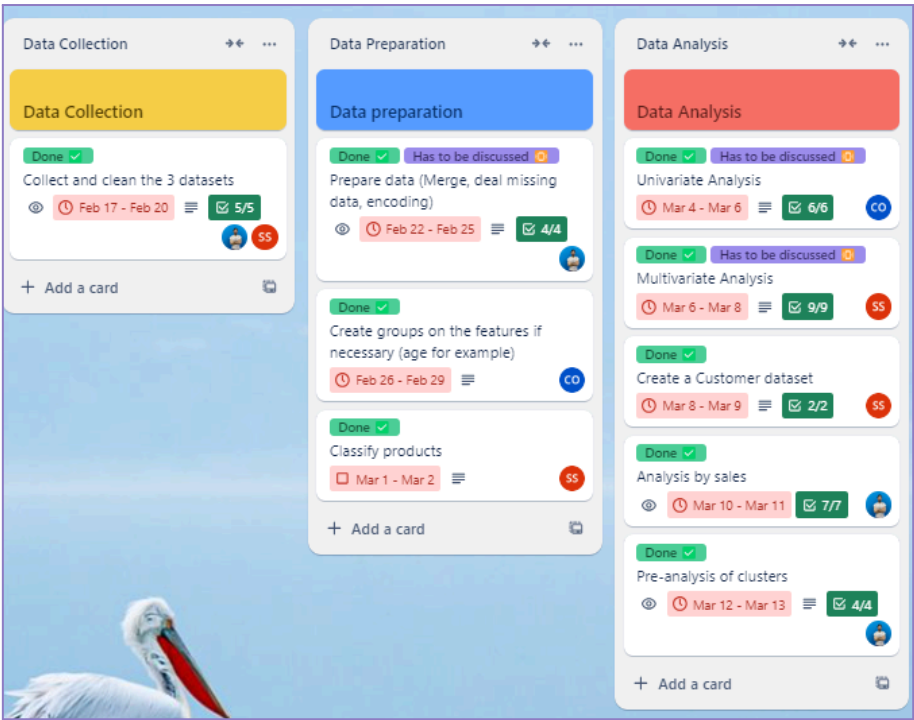
Task 1 - Analysis

Fig 1.1 - List of cards related with task 1: Data Collection, Data Preparation and Data Analysis.

Data Collection	Data Collection	Done ✓	CO SS	☐	Feb 21
Collect and clean the 3 datasets	Data Collection	Done ✓	SS	☐	Feb 20
Data preparation	Data Preparation	Done ✓	CO SS	☐	Mar 2
Prepare data (Merge, deal missing data, encoding)	Data Preparation	Done ✓ Has to be discussed		☐	Feb 25
Create groups on the features if necessary (age for example)	Data Preparation	Done ✓	CO	☐	Feb 29
Classify products	Data Preparation	Done ✓	SS	☐	Mar 2
Data Analysis	Data Analysis	Done ✓	CO SS	☐	Mar 13
Univariate Analysis	Data Analysis	Done ✓ Has to be discussed	CO	☐	Mar 6
Multivariate Analysis	Data Analysis	Done ✓ Has to be discussed	SS	☐	Mar 8
Create a Customer dataset	Data Analysis	Done ✓	SS	☐	Mar 9
Analysis by sales	Data Analysis	Done ✓		☐	Mar 11
Pre-analysis of clusters	Data Analysis	Done ✓		☐	Mar 13

Fig 1.2 - Table with information about cards related to task 1: Data Collection, Data Preparation and Data Analysis.
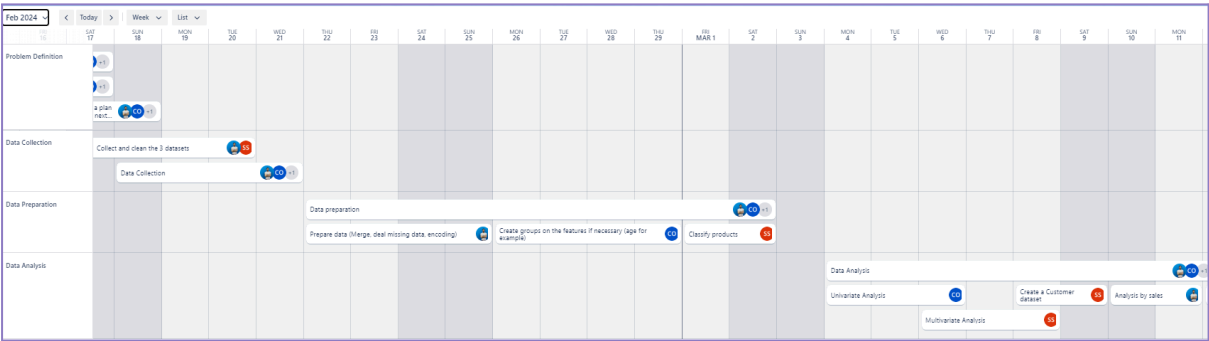

Fig 1.3 - Timeline related with task 1: Data Collection, Data Preparation and Data Analysis.
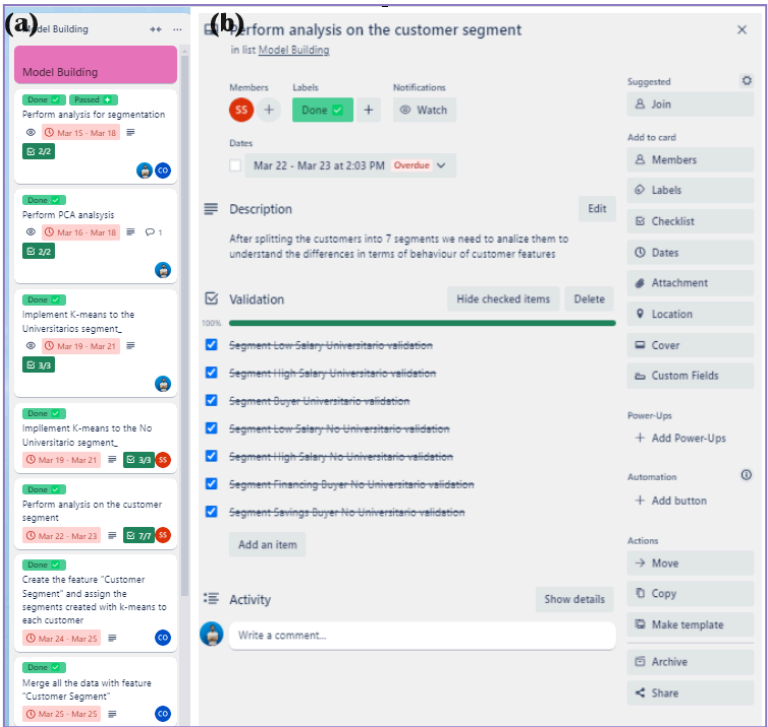
Task 2 - Segmentation

Fig 2.1 - List of cards related to task 2: Model Building (a) and Details of card "*Perform analysis on the customer segment*" (b).

Fig 2.2 - Table with information about cards related to task 2: Model Building.
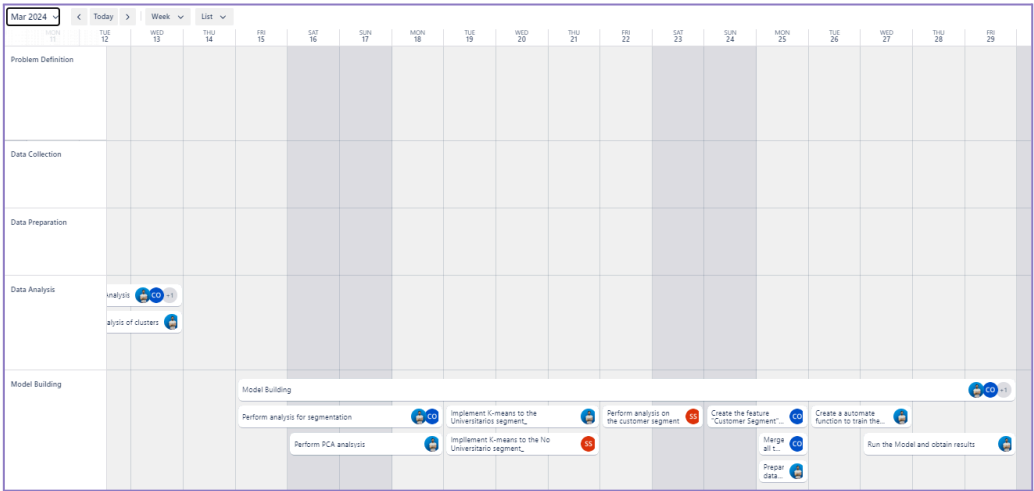

Fig 2.3 - Timeline related with task 2: Model Building.
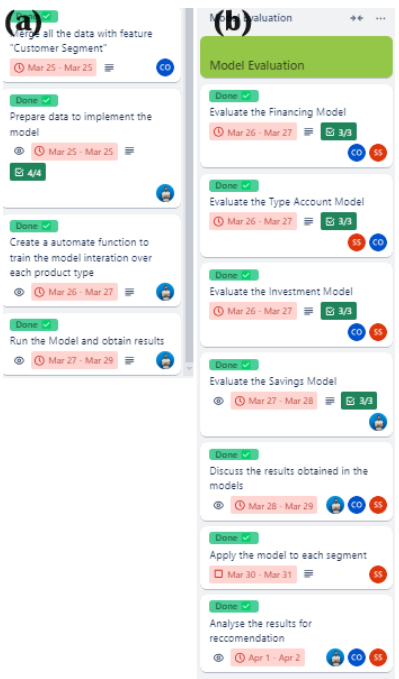
Task 3 - Recommendation

Fig 3.1 - List of cards related to task 3: Model Building (a) and Model Evaluation (b).

Fig 3.2 - Table with information about cards related to task 3: Model Building and Model Evaluation.
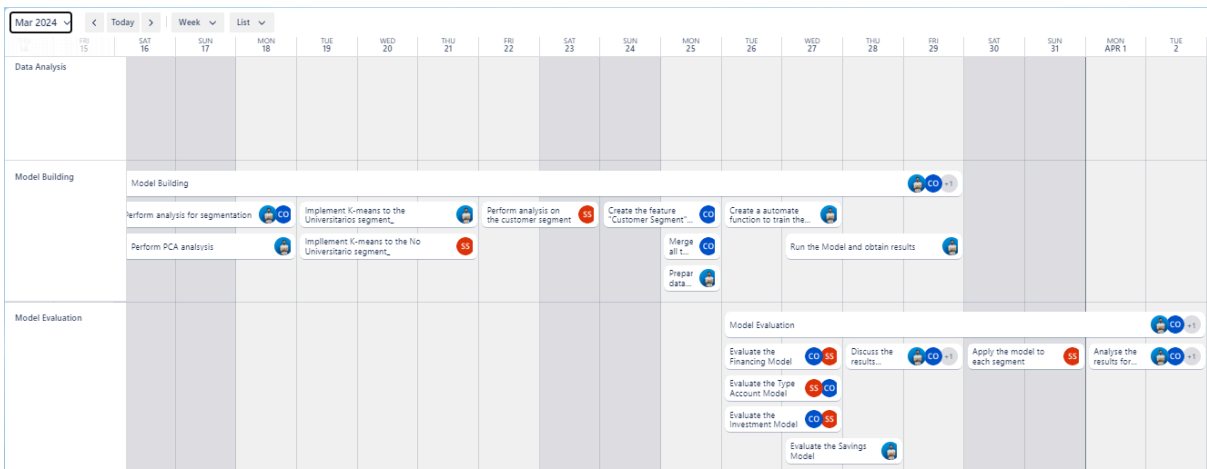

Fig 3.3 - Timeline related with task 3: Model Building and Model Evaluation.
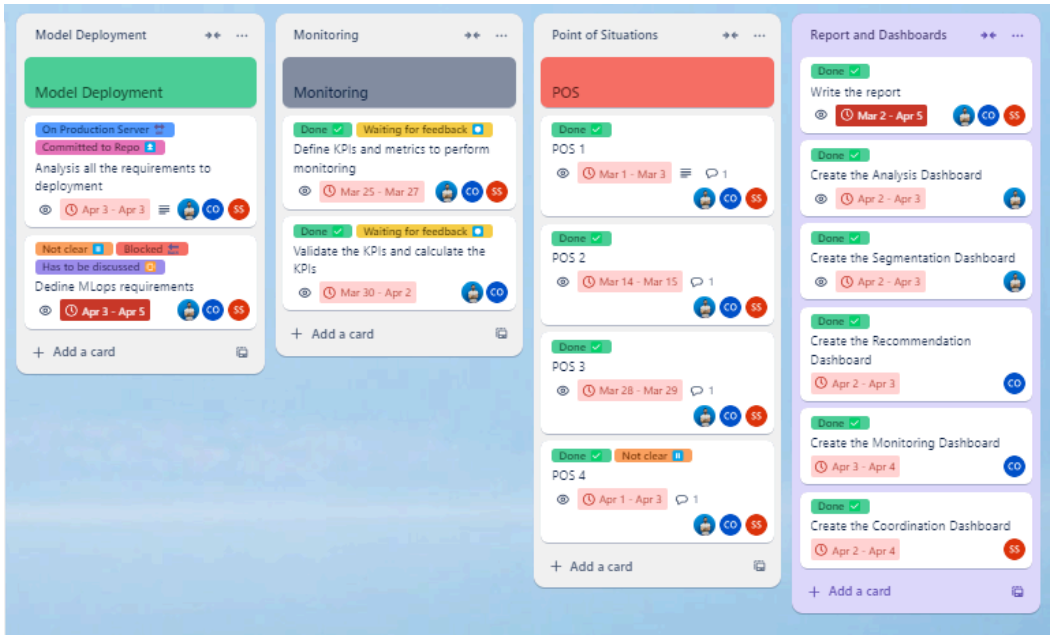
Task 4 - Monitoring

Fig 4.1 - List of cards related to task 4: Model Deployment (definition), Monitoring (definition), POS and Report and Dashboards.

Fig 4.2 - Table with information about cards related to task 4: Model Deployment (definition), Monitoring (definition), POS and Report and Dashboards.
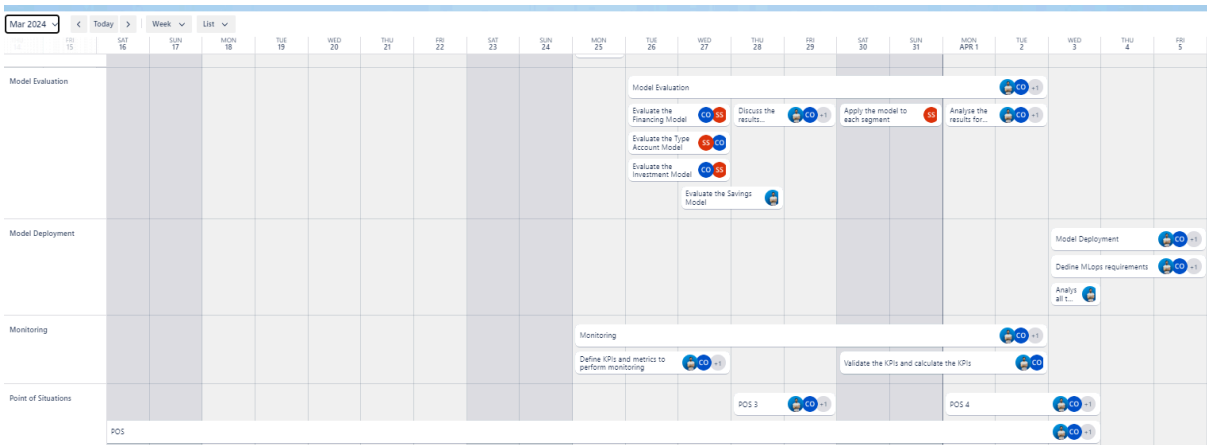

Fig 4.3 - Timeline related with task 4: Model Deployment (definition), Monitoring (definition), POS and Report and Dashboards.
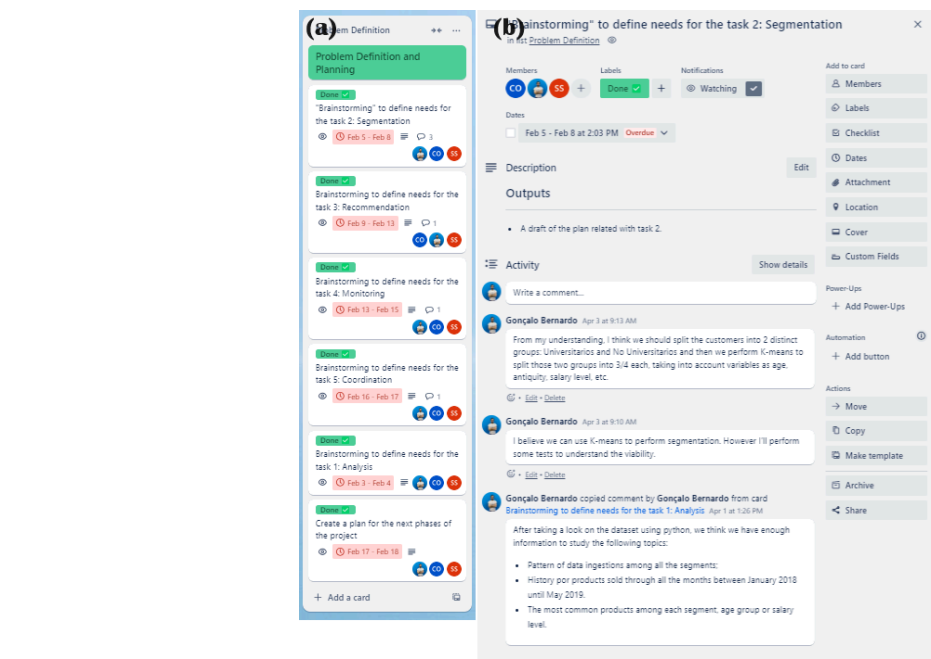
Task 5 - Coordination/ Planning

Fig 5.1 - List of cards related to task 5: Problem Definition and Planning (a) and a detail of the card "Brainstorming to define needs for task 2: Segmentation" (b).

Card	List	Labels	Members	Due date
Problem Definition and Planning	Problem Definition	Done ✓		Feb 17
"Brainstorming" to define needs for the task 2: Segmentation	Problem Definition	Done ✓		Feb 8
Brainstorming to define needs for the task 3: Recommendation	Problem Definition	Done ✓		Feb 13
Brainstorming to define needs for the task 4: Monitoring	Problem Definition	Done ✓		Feb 15
Brainstorming to define needs for the task 5: Coordination	Problem Definition	Done ✓		Feb 17
Brainstorming to define needs for the task 1: Analysis	Problem Definition	Done ✓		Feb 4
Create a plan for the next phases of the project	Problem Definition	Done ✓		Feb 18

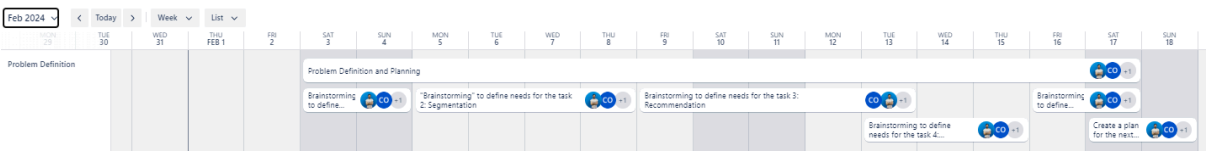Fig 5.2 - Table with information about cards related to task 5: Definition and Planning.

Fig 5.3 - Timeline related with task 5: Definition and Planning.