X-sell Early Account Monitoring Report 1

Project Overview:

Project aimed at monitoring early accounts in a cross-selling initiative at a company offering two credit card types: the Fuel-Only Card (used exclusively for gasoline) and the Universal Card (used for a broader range of goods and services). The initiative encourages Fuel-Only Card holders to switch to the Universal Card or increase credit limits for existing Universal Card users, leveraging trust and loyalty to expand revenue.

Deliverables / Questions to be answered to Fleetcor:

1. Customer Performance Evaluation
2. Transaction Evaluation
3. Risk Assessment
4. Create a Cross-Sell performance dashboard
5. Decision-Making.

Overview on Data provided:

We reviewed the provided data and its fields, along with their data types. We then planned how to establish relationships between the entities. Additionally, we noted that the data needs to be consolidated and cleaned up to ensure the project goes smoothly for upcoming steps.

Technologies & Tools:

1. R for Data Analysis

2.SQL as database

3.Excel for Data consolidation

4. Power BI for Dashboards.

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Models:

1. Logistic Regression (Customer Performance Evaluation, Risk Assessment and Transaction Evaluation).

2. Random Forest (Customer Performance Evaluation, Risk Assessment and Transaction Evaluation).

We're going to make decisions based on the output of the above-mentioned models.