Business Requirement Document

Data Dictionary:

- <u>RowNumber</u>: corresponds to the record (row) number and has no effect on the output.
- <u>CustomerId</u>: contains random values and has no effect on customer leaving the bank.
- <u>Surname</u>: the surname of a customer has no impact on their decision to leave the bank.
- <u>CreditScore</u>: can have an effect on customer churn, since a customer with a higher credit score is less likely to leave the bank.
- <u>Credit score</u>:
    - Excellent: 800–850
    - Very Good: 740–799
    - Good: 670–739
    - Fair: 580–669
    - Poor: 300–579
- <u>Geography</u>: a customer's location can affect their decision to leave the bank.
- <u>Gender</u>: it's interesting to explore whether gender plays a role in a customer leaving the bank.
- <u>Age</u>: this is certainly relevant, since older customers are less likely to leave their bank than younger ones.
- <u>Tenure</u>: refers to the number of years that the customer has been a client of the bank. Normally, older clients are more loyal and less likely to leave a bank.
    - <u>Balance</u>: also a very good indicator of customer churn, as people with a higher balance in their accounts are less likely to leave the bank compared to those with lower balances.
    - <u>NumOfProducts</u>: refers to the number of products that a customer has purchased through the bank.
    - <u>HasCrCard</u>: denotes whether or not a customer has a credit card. This column is also relevant, since people with a credit card are less likely to leave the bank.
        - 1 represents **credit card holder**
        - 0 represents **non credit card holder**
    - <u>IsActiveMember</u>: active customers are less likely to leave the bank.
        - 1 represents **Active Member**
        - 0 represents **Inactive Member**
    - <u>Estimated Salary</u>: as with balance, people with lower salaries are more likely to leave the bank compared to those with higher salaries.
    - <u>Exited</u>: whether or not the customer left the bank.
        0 represents **Retain**
        1 represents **Exit**

o   <u>Bank DOJ:</u> date when the Customer associated/joined with the bank.

Data Gathering:

The following data assets have been used to pull the data related to Bank customers and associated details:

- o   ActiveCustomer
- o   Bank_Churn
- o   CreditCard
- o   CustomerInfo
- o   ExitCustomer
- o   Gender
- o   Geography

Churn Analysis:

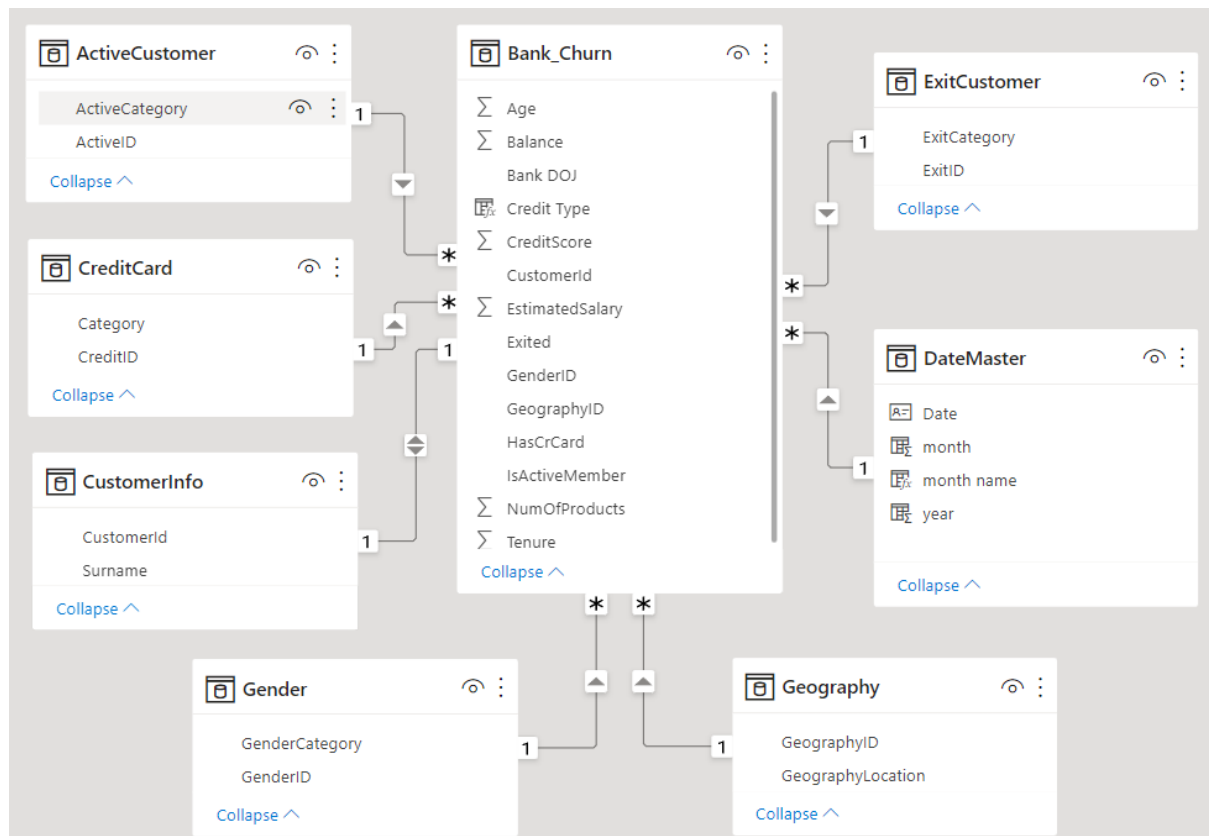Analysis of the data was done to bring out insights on the customer Churn.

It is advantageous for banks to know what leads a client towards the decision to leave the company.

Churn prevention allows companies to develop loyalty programs and retention campaigns to keep as many customers as possible.

Project Flow Steps:

- Business requirement document (BRD)
- Data Gathering
- Data cleaning and transformation
- Data modelling
- UI
- DAX Functions
- Enhance UI
- RLS
- Create and provide the workspace access
- Publish the report to the workspace
- Build Dashboard and Mobile view
- Establish Gateway
- Schedule daily refresh
- Add roles to security
- Subscribe and manage alerts
- Create and deploy as an app

Data Model:

References:

https://www.youtube.com/watch?v=aXNhtcQ4nEU

https://www.arbelatech.com/insights-resources/white-papers/advanced-analytics-with-power-bi