

# Business Requirement Document

## Data Dictionary:

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

- o Bank DOJ: 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.

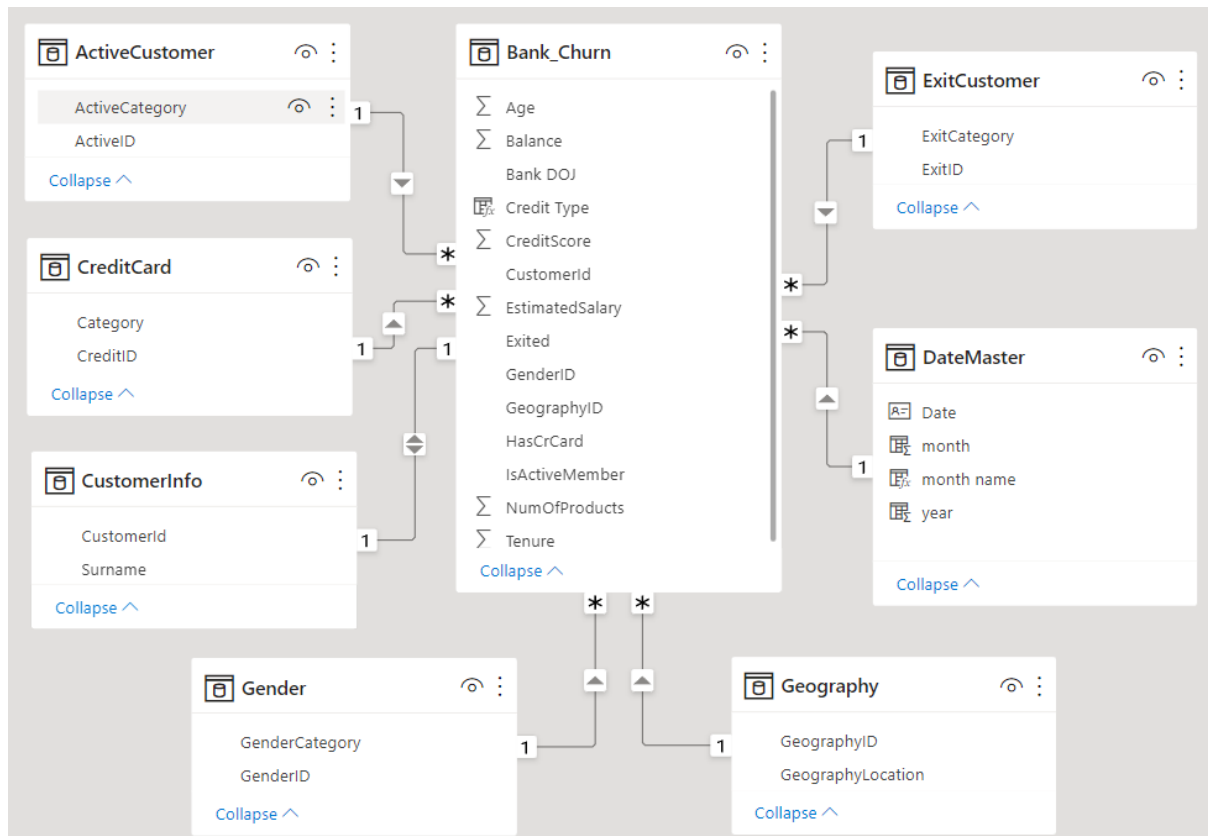
Churn prevention allows companies to develop loyalty programs and retention campaigns to keep as many customers as possible.

## Project Flow Steps:

1. Business requirement document (BRD)
2. Functional requirement document (FRD)
3. Data Gathering
4. Data cleaning and transformation
5. Data modelling
6. UI (power view reports )
7. DAX Functions
8. Enhance UI
9. RLS
10. create workspace and provide the workspace access
11. publish the report to the workspace
12. Dashboard/Mobile view- create and deploy as an app
13. Gateway (one time step)

14. Schedule a refresh
15. Add roles to security
15. Subscribe, manage alerts
16. Share the report

## Data Model:



## References:

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

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