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:
    - Excellent: 800–850
    - Very Good: 740–799
    - Good: 670–739
    - Fair: 580–669
    - 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.
    - 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.
    - NumOfProducts: refers to the number of products that a customer has purchased through the bank.
    - 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**
    - IsActiveMember: active customers are less likely to leave the bank.
        - 1 represents **Active Member**
        - 0 represents **Inactive Member**
    - Estimated Salary: as with balance, people with lower salaries are more likely to leave the bank compared to those with higher salaries.
    - Exited: whether or not the customer left the bank.

      0 represents **Retain**

      1 represents **Exit**
    - 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:

- ActiveCustomer
- Bank_Churn
- CreditCard
- CustomerInfo
- ExitCustomer
- Gender
- 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

References:

https://www.youtube.com/watch?v=aXNhtcQ4nEU
https://www.arbelatech.com/insights-resources/white-papers/advanced-analytics-with-power-bi