

Term Deposit Campaign - Executive Overview

(KPI-driven insights to optimize telephone outreach investment)

Month

All

Job Type

All

Contact

All

Success Rate (%)

11.7%

Total Customers Contacted

45,211

Successful Subscriptions

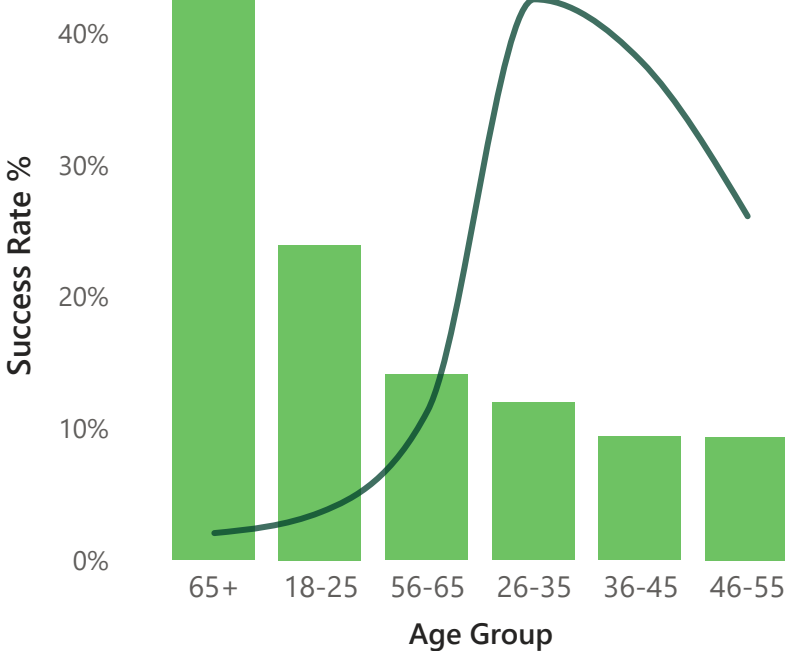
5,289

Avg Call Duration (Mins)

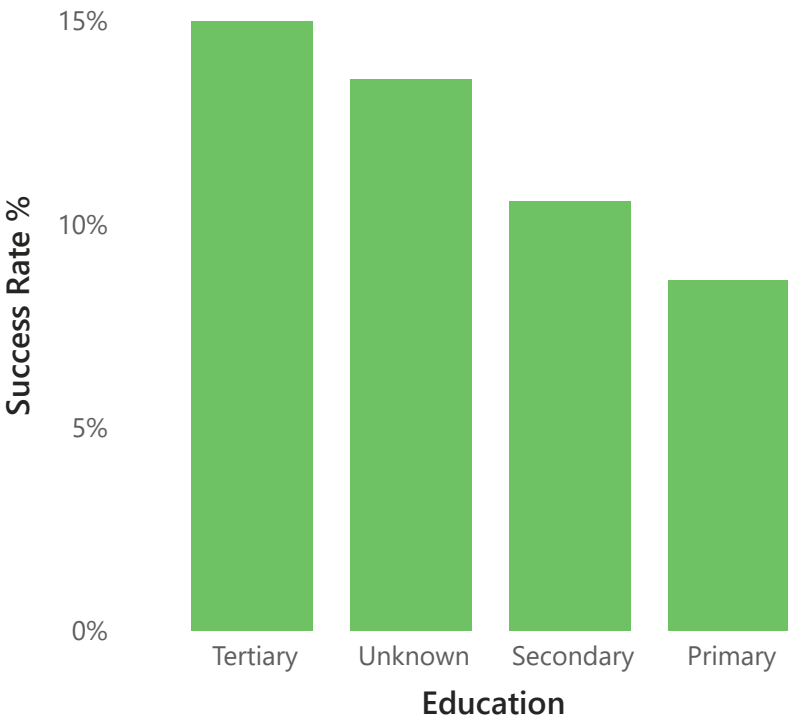
9.18

Success Rate by Age Group (%)

● Success Rate % — Customers Contacted

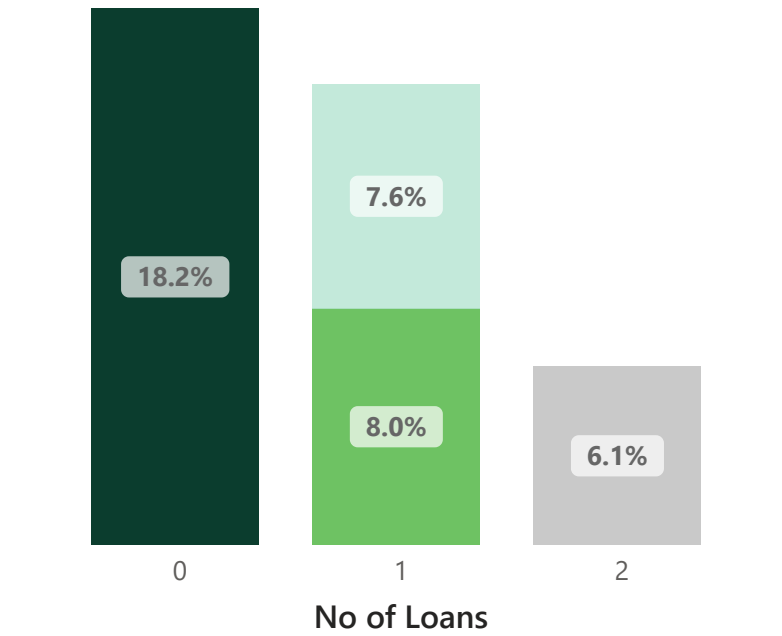


Success Rate by Education Level (%)



Conversion by Existing Products (%)

● Both Loans ● Housing Loan ● No Loans ● Personal Loan



Executive Recommendations & Targeting Insights:

- **Balance efficiency and scale:** Customers aged **65+** and **18–25** show higher conversion rates, while **26–45** drives the highest subscription volume.
- **Education targeting:** **Tertiary-educated customers** convert best, followed by **Secondary** — prioritize these segments for focused outreach.
- **Cross-sell optimization:** For ages **26–55**, customers with a **Housing Loan** convert better; for **55+**, customers **without existing loans** show stronger responses.
- **Prior success matters:** Customers who **subscribed previously** convert significantly better & most conversions occur **within the first 3 calls**.

Term Deposit Campaign - Detailed Insights

Age Grp
All

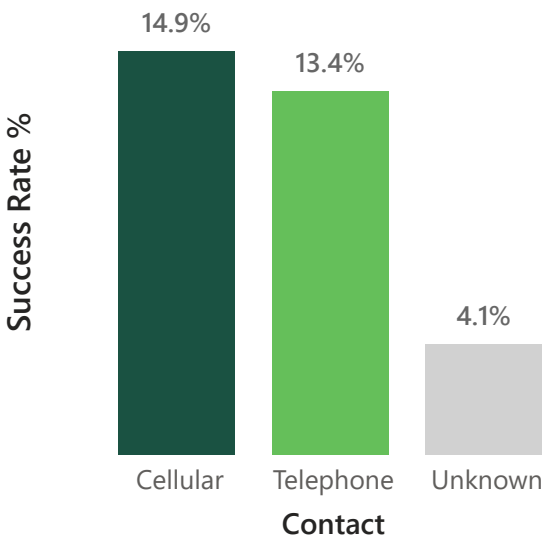
Education
All

Job
All

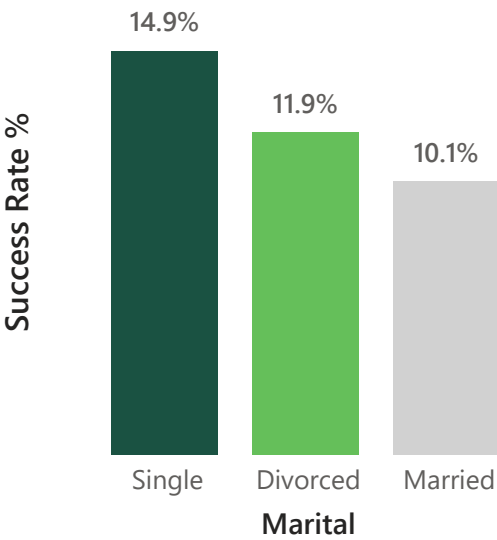
Month
All

This page provides diagnostic insights to understand what drives conversion — channel effectiveness, contact frequency, prior outcomes, and customer segments. Use slicers to explore specific units

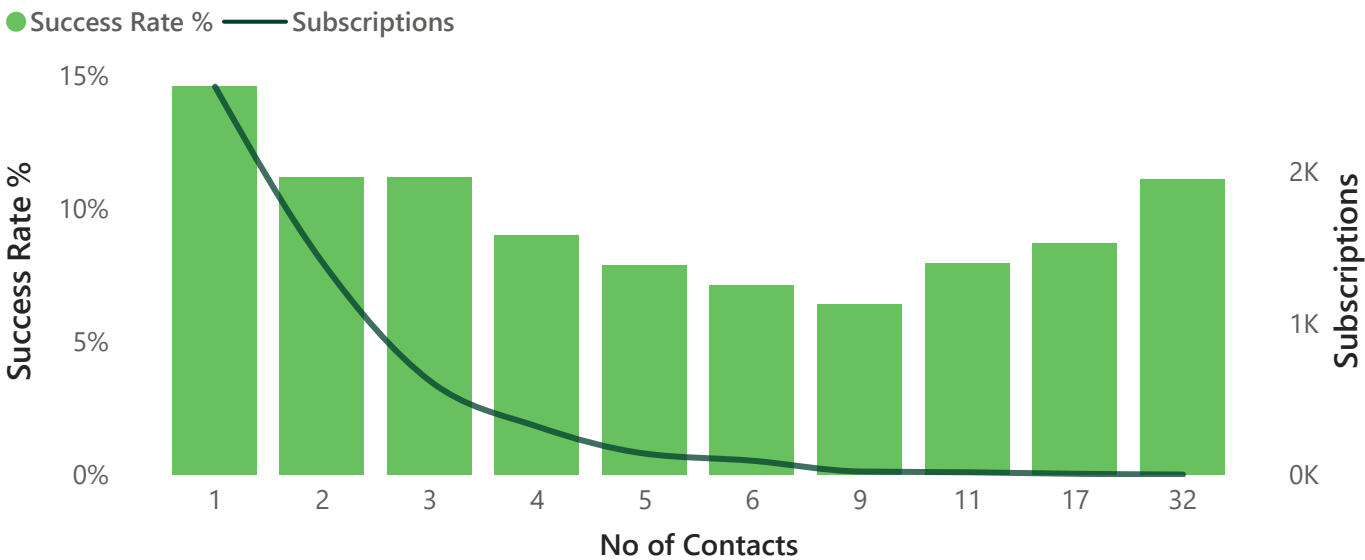
Conversion by Contact Channel (%)



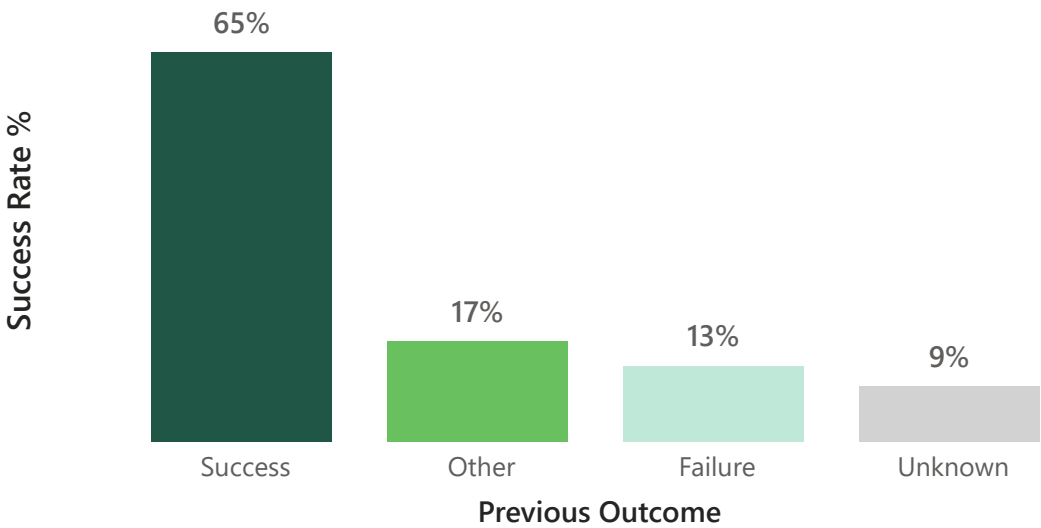
Conversion by Marital Status (%)



Impact of Multiple Contacts on Success Rate (%)



Effect of Previous Campaign Outcome on Conversion (%)



Customer Segment Conversion - Summary Table

Education		Primary		Secondary		Total
Age Group		Conversion Rate (%)	Contacts	Conversion Rate (%)	Contacts	
+ 65+		42.8%	306	44.0%	225	
+ 18-25		24.7%	97	22.0%	889	
+ 56-65		9.7%	1,092	14.7%	1,803	
+ 26-35		6.8%	1,258	10.2%	8,371	
+ 36-45		6.0%	2,116	8.2%	7,251	
+ 46-55		6.0%	1,982	9.5%	4,663	
Total		8.6%	6,851	10.6%	23,202	