

# 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

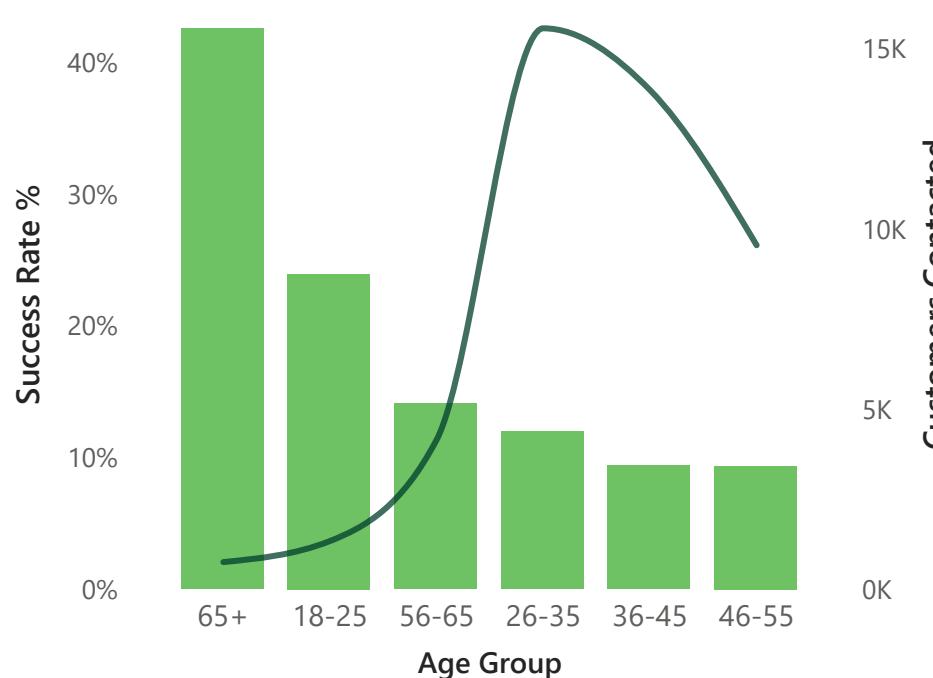
5,289

Avg Call Duration (Mins)

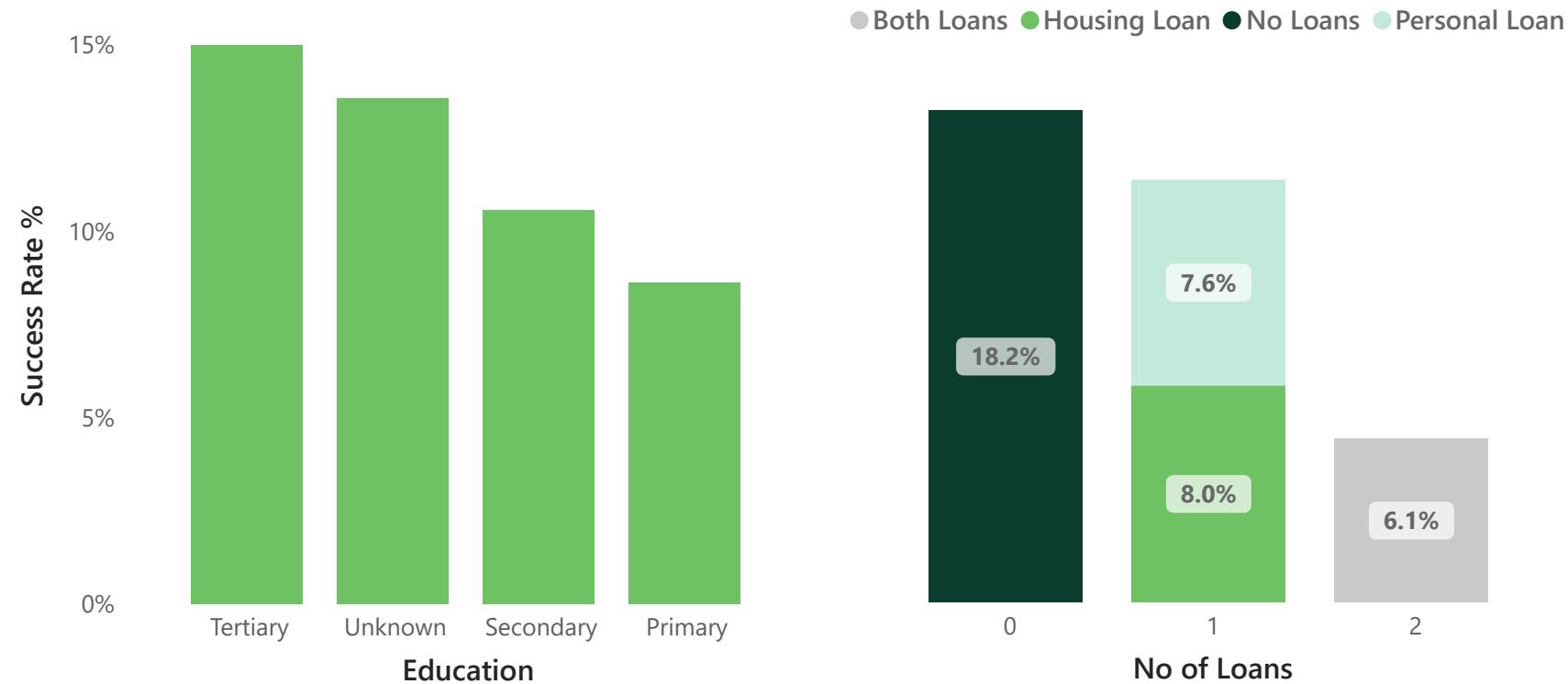
9.18

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 ▾

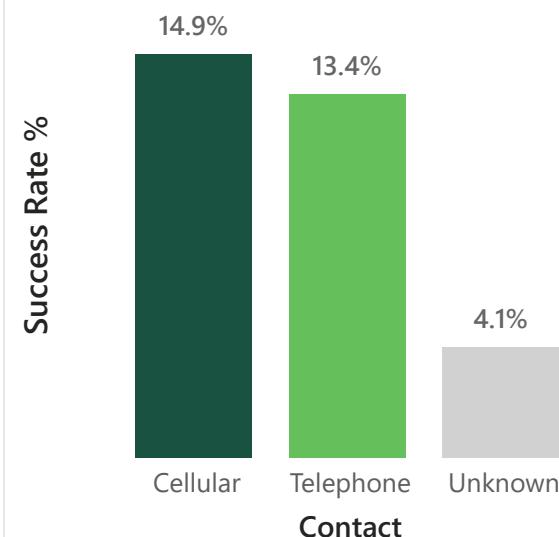
Month ▾

All ▾

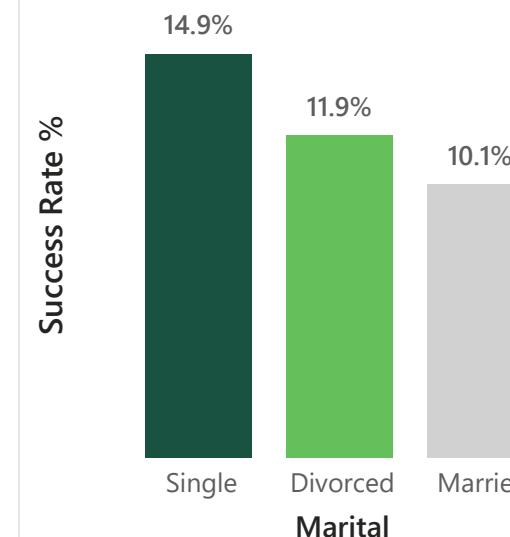
This page provides diagnostic insights to understand what drives conversion — channel effectiveness, contact frequency, prior outcomes, and customer segments.

Use slicers to explore specific units

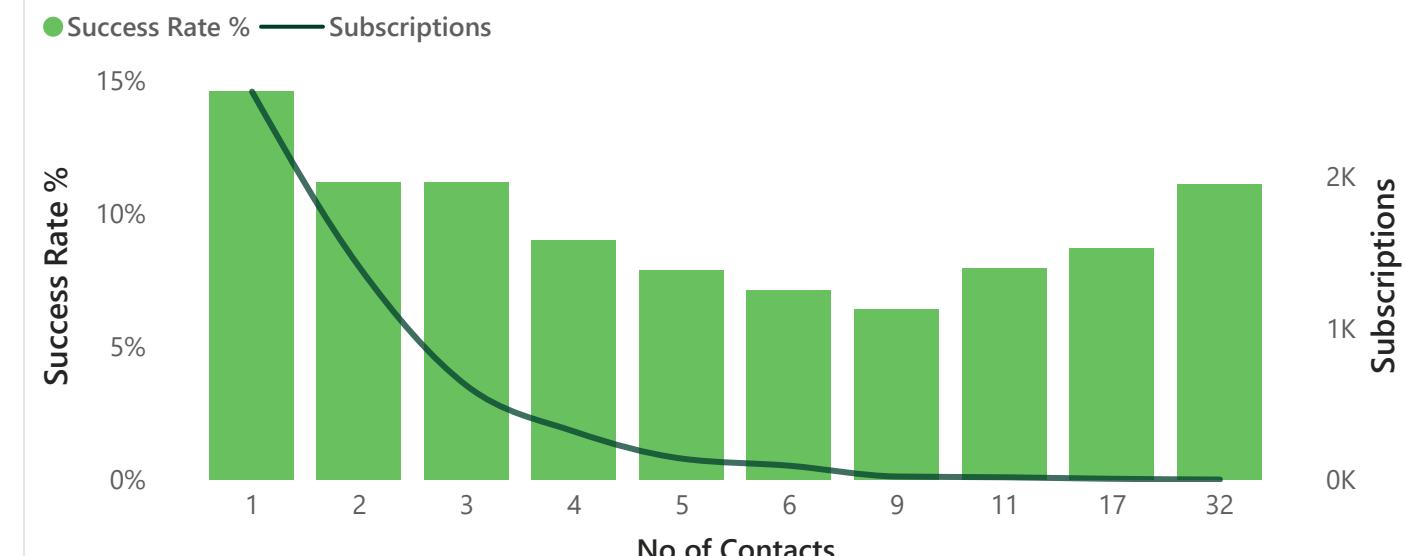
Conversion by Contact Channel (%)



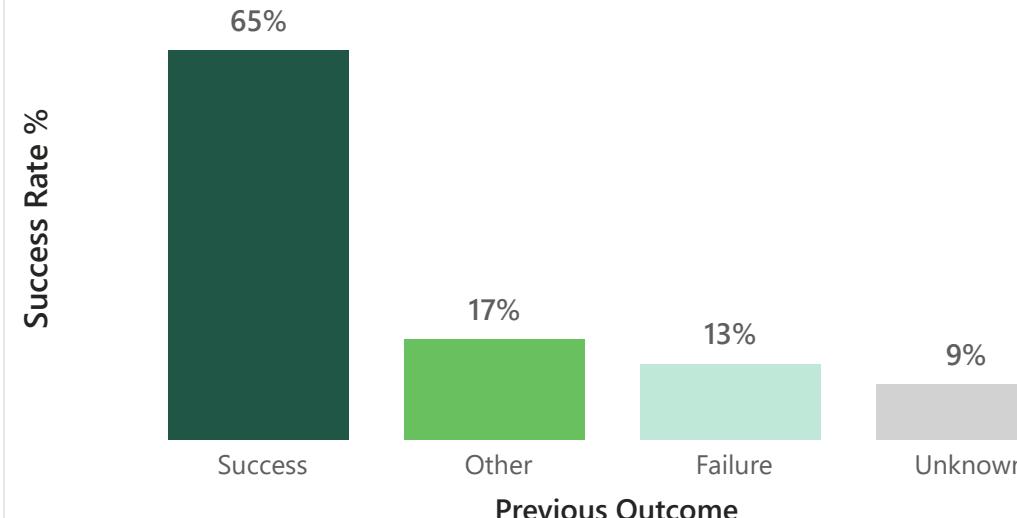
Conversion by Marital Status (%)



Impact of Multiple Contacts on Success Rate (%)



Effect of Previous Campaign Outcome on Conversion (%)



Customer Segment Conversion - Summary Table

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