

Per Lead Outcome

39%

Avg. Existing Credit Card

1

Count of ID

105K

Avg. Credit Card Score

603

Loan Status

All

Credit Card Score

All

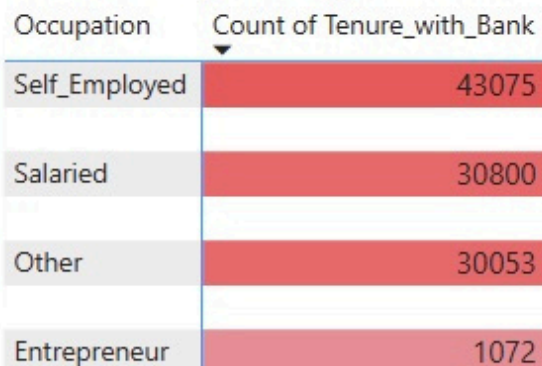
Account Category

All

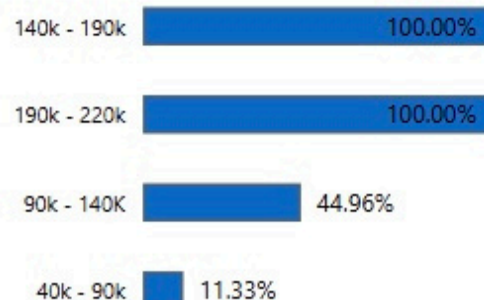
Occupation by Lead outcome Rate



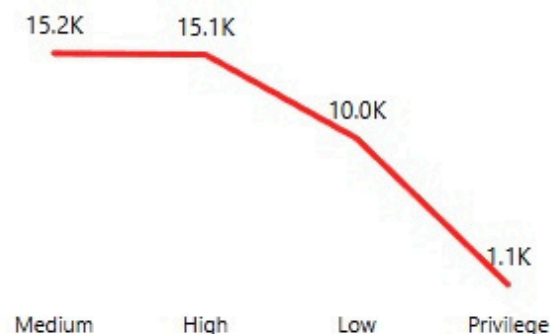
Occupation by Tenure



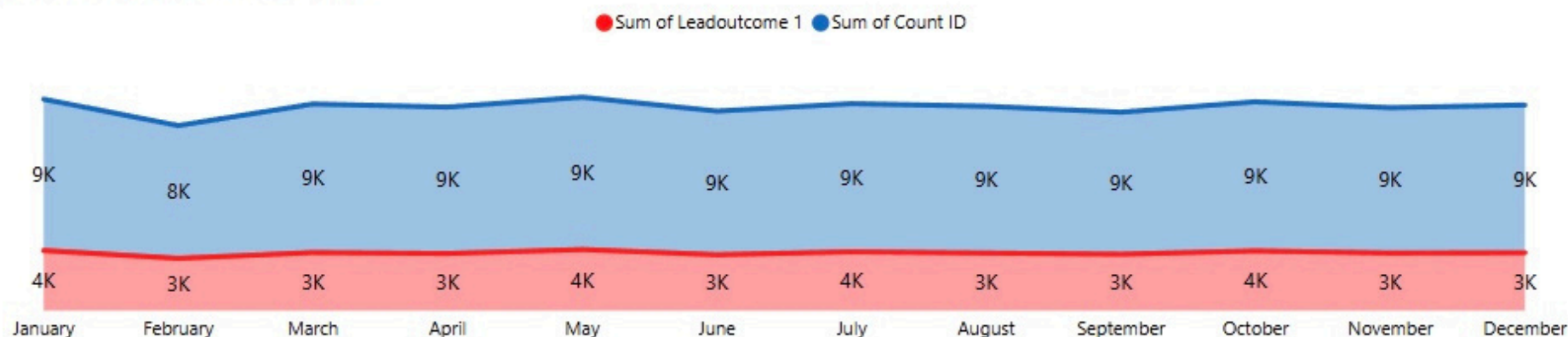
Monthly Salary by Lead outcome



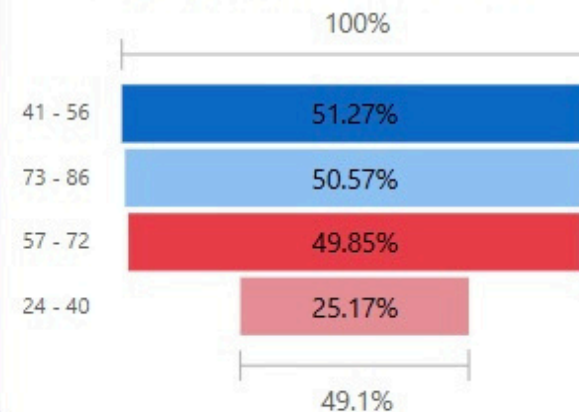
Account Category by Lead outcome



Month by Lead outcome



Age by Lead outcome Rate



Per Lead Outcome

23%

Avg. Existing Credit Card

Card  
1

Count of ID

31K

Avg. Credit Card Score

551

Loan Status

All

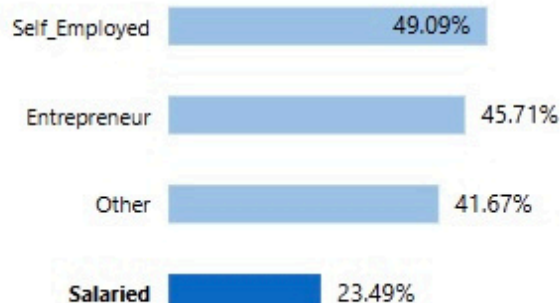
Credit Card Score

All

Account Category

All

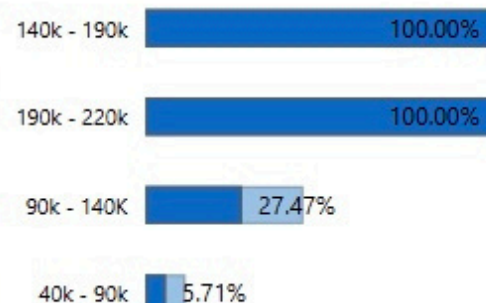
## Occupation by Lead outcome Rate



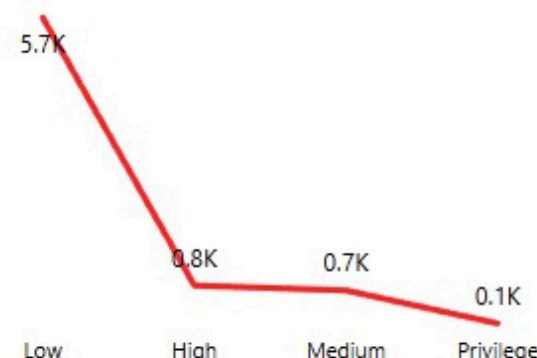
## Occupation by Tenure

Occupation	Count of Tenure_with_Bank
Salaried	30800
<b>Total</b>	<b>30800</b>

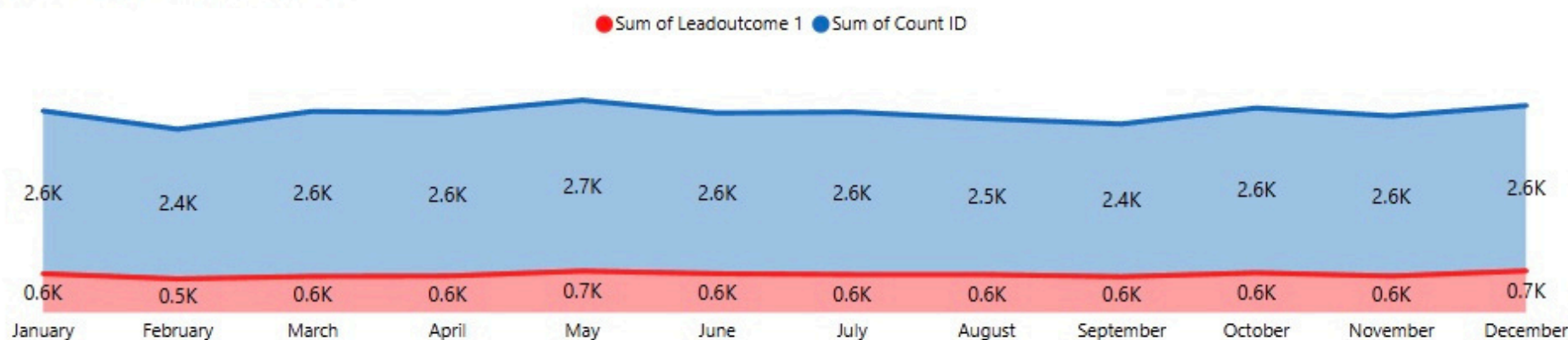
## Monthly Salary by Lead outcome



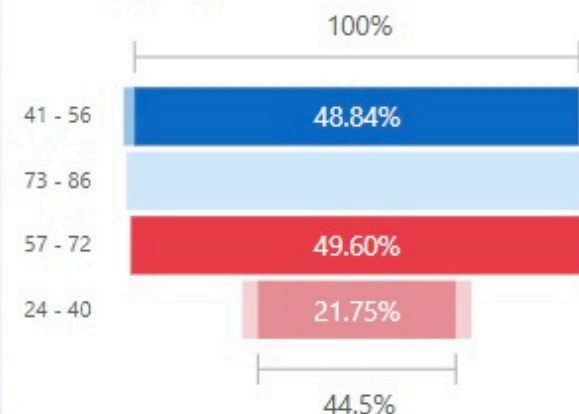
## Account Category by Lead outcome



## Month by Lead outcome



## Age by Lead outcome Rate





## Objective:

To develop a lead prediction model to identify the bank's most valuable customers likely interested in credit cards and loans. Using data-driven insights, create an interactive dashboard that highlights key customer details, helping the bank target the right customers for their products.

## Key Insights:

1. The first graph, a line chart, shows that leads are evenly distributed each month, with around 3,500 leads every month. This suggests the bank targets a fixed number of leads each month.
2. Self-employed individuals and entrepreneurs are the main sources of leads.
3. The 40-60 age group is the main source of leads, and they also have the highest number of credit card holders.
4. Customers with medium and high account categories are the main leads, especially in the 40-60 and 20-30 age groups.
5. As expected, customers with higher salaries are the best leads for the bank, and they are mostly in the 40-60 age group.

1. **Target Self-Employed and Entrepreneurs:** Create special offers for self-employed and entrepreneur customers, highlighting flexible payment options and business perks as they generate the most leads.
2. **Focus on the 40-60 Age Group:** Prioritize customers in the 40-60 age group, as they have the highest credit card ownership and lead conversion.
3. **Appeal to Medium and High Account Holders:** Provide premium products and personalized services to customers with medium and high account balances.
4. **Create Offers for High Salary Customers:** Develop exclusive products for high salary customers, like premium credit cards and customized loans.
5. **Engage Younger Customers (20-30):** Introduce products for the 20-30 age group, like low-interest loans or credit cards with rewards for young professionals.

**In Scope** - The project focuses on analyzing historical data to predict leads for credit cards and loans. It includes creating a Power BI dashboard to visualize key insights and trends. The goal is to identify valuable customer segments and provide recommendations for targeted marketing strategies to improve lead conversion and acquisition.

**Out Scope** - Direct implementation of marketing strategies and changes to existing bank policies are not within the scope of this project. The project will focus on data analysis and developing a Power BI dashboard for lead prediction and targeted marketing recommendations, without involving the execution of marketing campaigns or policy changes.

**Thank you**