Credit Card Financial Dashboard

Overview

In this project, we will create two comprehensive dashboards to analyze and monitor credit card operations efficiently and effectively. The dashboards will provide real-time insights into key performance metrics and trends, enabling stakeholders to make informed decisions.

Dashboards to be Created

1. Credit Card Customer Report: This dashboard will focus on customer-related data, providing insights into customer demographics, behaviors, and satisfaction levels.

2. Credit Card Transaction Report: This dashboard will present detailed information on credit card transactions, including weekly transaction data, revenue, and other important metrics.

Data and Filters

- Data Source: The project will utilize credit card data, including customer details and transaction details.

- Weekly Reports: The data will be organized on a weekly basis, from the first week of January to the last week of December. Each week's data will be available for analysis.

- Filters: Various filters will be implemented to allow users to drill down into the data, including:

- Gender (Male/Female)

- Income Range

- Card Type (Blue, Silver, Gold, Platinum)

- Quarter (Q1, Q2, Q3, Q4)

Key Performance Indicators (KPIs)

- Total Revenue: The overall revenue generated from credit card operations.

- Interest Rate: The total interest generated from credit card transactions.

- Transaction Count: The number of transactions made using credit cards.

- Customer Satisfaction Score (CSS): The satisfaction level of customers, broken down by gender and card type.

- Annual Fee: The annual fee collected from different types of credit cards.

Charts and Visualizations

- Tree Map: Used for filtering data based on various dimensions such as income and card type.

- Column Charts: Display revenue comparisons based on different metrics such as customer job, education level, and usage.

- Revenue vs. Gender: A weekly level chart showing performance week on week by gender.

- Top Five States: Highlighting states with the highest number of credit card customers.

Design Considerations

- Color Scheme: A professional and simple color scheme will be used to ensure readability and focus on key data points. Minimal colors will be applied to avoid distractions and maintain clarity.

- Template: The dashboard template will be designed to be reusable and easy to update. Once finalized, it can be refreshed weekly with new data.

Project Objective

The objective of this project is to develop a comprehensive Credit Card Weekly Dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations efficiently and effectively.

Instructions for Use

1. Data Preparation: Ensure that the credit card data is up-to-date and organized on a weekly basis.

2. Dashboard Creation: Follow the design template to create the Credit Card Customer Report and Credit Card Transaction Report.

3. Applying Filters: Utilize the provided filters to drill down into specific data segments.

4. Updating Data: Refresh the dashboard weekly with new data to keep the insights current and relevant.

5. Review KPIs: Monitor the key performance indicators to track the performance and trends of credit card operations.

By following these steps, you will be able to create a functional and insightful Credit Card Financial Dashboard that meets the project's objectives and provides valuable insights to stakeholders.