Problem Statement

A retail bank is seeking to improve the performance of its term-deposit marketing campaigns. Historical campaigns relied heavily on outbound phone calls, yet subscription rates remain modest. Leadership wants to understand how data can be used to better target potential clients and optimize campaign efficiency.

You are provided with a marketing dataset inspired by real banking campaigns. Each record represents a client interaction and includes demographic, economic, and campaign-related attributes.

The objective is to use analytics to support more informed marketing decisions.

Project Scope

The analysis focused on three components:

1. Predictive Analytics

A classification approach was used to estimate the likelihood that a client subscribes to a term deposit. The goal was to move beyond descriptive reporting and provide a forward-looking signal to support targeting decisions.

2. Client Segmentation

Clustering techniques were applied to identify groups of clients with similar characteristics and campaign responses. This segmentation helps distinguish between high-potential and low-potential audiences.

3. Decision Support Dashboard

A Power BI dashboard was developed to translate analytical outputs into business insights. The dashboard allows stakeholders to explore client segments, historical performance, and predicted opportunities in an intuitive way.

Communication Deliverables

Findings were summarized in a concise presentation designed for non-technical stakeholders. The focus was on:

- Business context

- Analytical approach

- Practical usage of insights

The presentation format assumed an executive-style briefing with limited time and emphasis on clarity.

Evaluation Focus

The success of the project was assessed based on:

- Depth and relevance of the analysis

- Practical usability of the dashboard

- Ability to communicate insights clearly to leadership