Pillar Bank

May 25, 2025 @ 06:00 P.M.

MARKETING CALL CAMPAIGN

REPORT

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OVERVIEW

This project focused on analyzing data from a direct marketing campaign carried out by Pillar bank, which involved customer outreach via phone calls. Using data analytics techniques, we aim to uncover actionable insights that can guide and optimize future marketing strategies, improve targeting, and increase campaign effectiveness.

KEY OBJECTIVES

- Conduct comprehensive exploratory data analysis to extract meaningful patterns, trends, and insights from the dataset.

- Design an interactive dashboard that effectively communicates your findings to stakeholders.

EXECUTIVE SUMMARY

➢ KEY CAMPAIGN METRICS.

➢ JOB DISTRIBUTION ANALYSIS.

➢ CAMPAIGN BY OUTCOME ANALYSIS.

➢ AGE GROUP ANALYSIS.

➢ CONTACT ANALYSIS.

➢ CORRELATION ANALYSIS.

➢ AGE GROUP VS HOUSING ANALYSIS

➢ VOLUME OF CALL VS OUTCOME AND JOB ANALYSIS.

➢ RECOMMENDATIONS

KEY CAMPAIGN METRICS.

- **Total Campaigns: 12,630 calls were made as part of the campaign.**

- **Total Customers Contacted: 4,521 unique customers were reached.**

- **Average Call Duration: Each call lasted an average of 264 seconds.**

- **Total Loans Issued: 588 customers have an existing loan.**

- **Overdrafts: 366 overdraft accounts were recorded.**

- **Total Credit Balance: €6,552,439.**

- **Total Loan Issued: €673,691.**

- **Total Overdraft: -€120,603.**
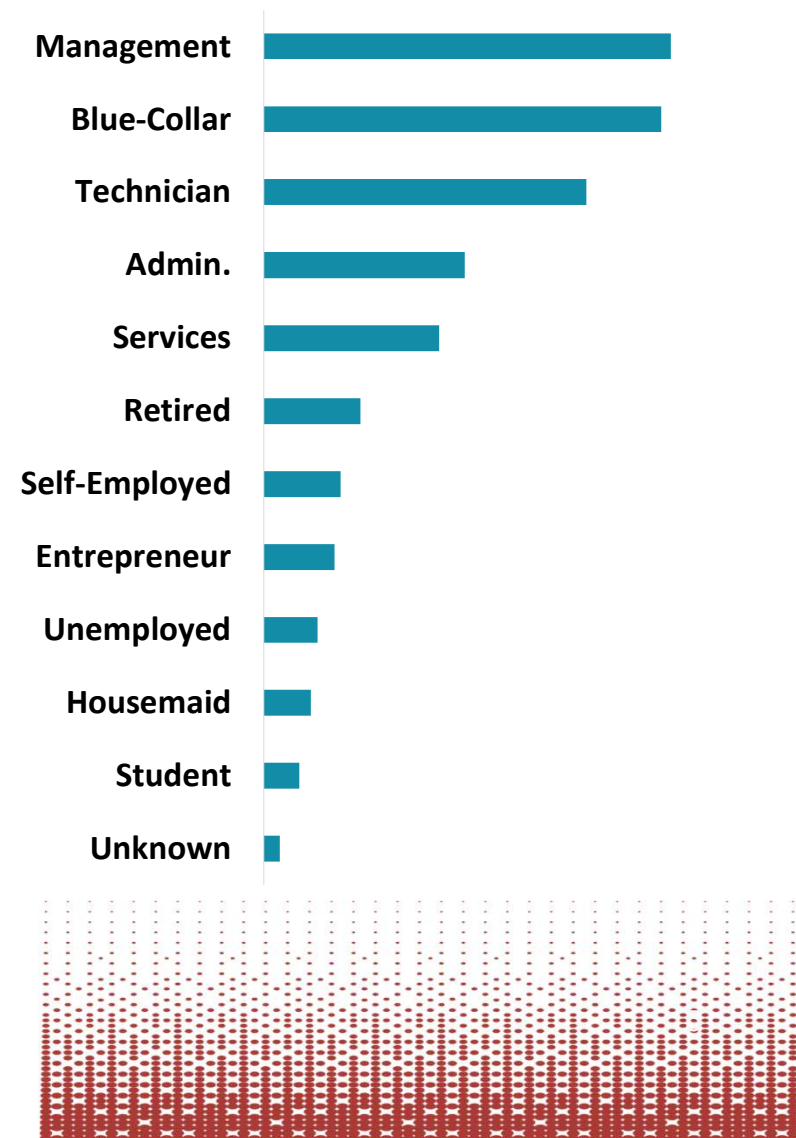
JOB DISTRIBUTION ANALYSIS

Distribution by Job/occupation
Most frequent occupations:
- ✓ Management
- ✓ Blue-Collar
- ✓ Technician
- ✓ Admin.

Insight:
The campaign is well-distributed across job types, but primarily targets employed individuals, particularly in managerial roles and skilled labour.

Job	
Management	
Blue-Collar	
Technician	
Admin.	
Services	
Retired	
Self-Employed	
Entrepreneur	
Unemployed	
Housemaid	
Student	
Unknown	

OUTCOME ANALYSIS.

o Success: 2%

o Failure: 7%

o Other: 4%

o Unknown: 87%

Insight:

▪ The success rate is extremely low (2%), indicating that very few campaigns resulted in the desired customer action (signing up for a product/service).

▪ 87% unknown outcomes suggest a major data quality issue, either the results of most calls were not recorded or tracked properly.

▪ Only 7% of campaigns are confirmed failures, meaning even failed calls were better documented than successful ones.
▪ The "Other" category (4%) should be clarified.

7%   4%

2%

12,630

■ Failure
■ Other
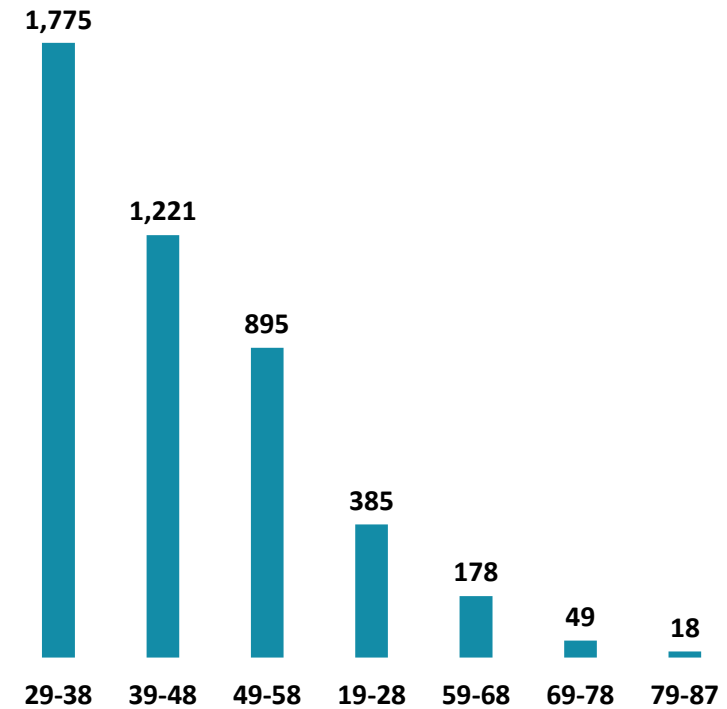■ Success
■ Unknown

87%
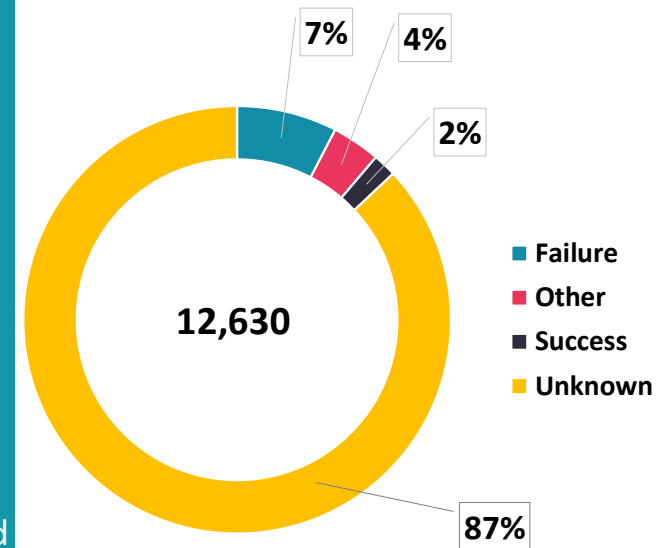
AGE GROUP ANALYSIS.

Largest group: 29–38 years (1,775)

Followed by: 39–48 years (1,221) and then

49-58 years (895)

Insight:

The campaign mostly targeted younger to middle-aged adults - likely due to financial product eligibility or responsiveness.
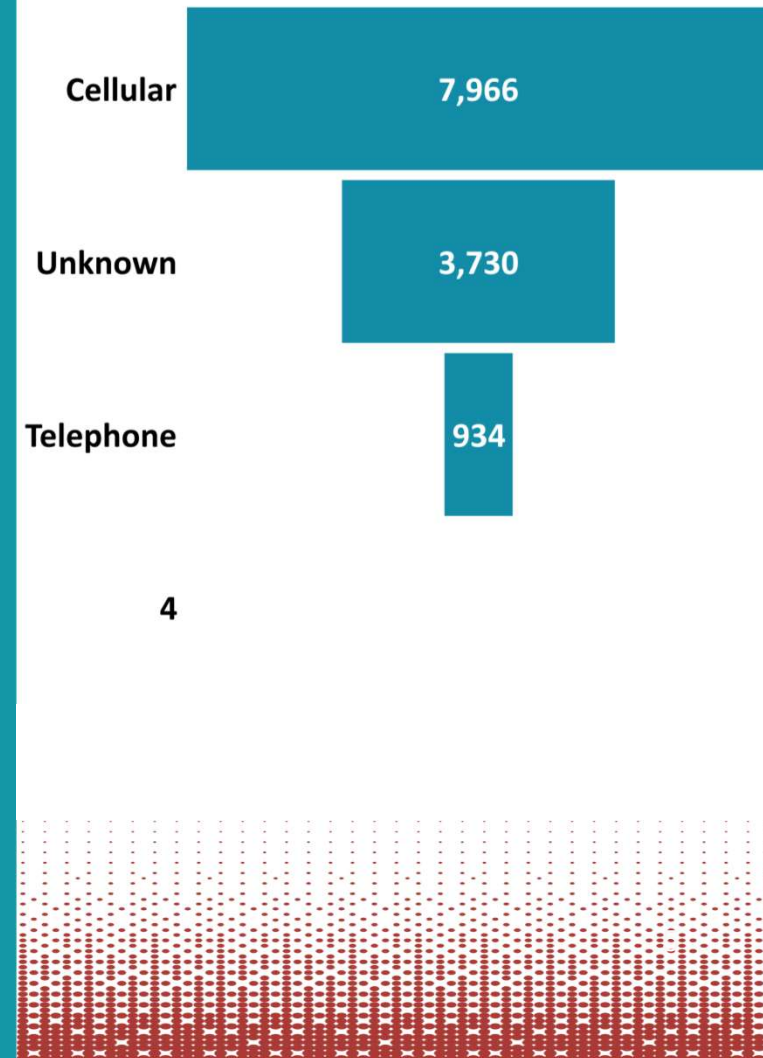
1,775

1,221

895

385

178

49

18

| 29-38 | 39-48 | 49-58 | 19-28 | 59-68 | 69-78 | 79-87 |

CONTACT ANALYSIS.

Insight:
Mobile phones is the primary and the dominant channel of campaign, reflecting a little bit of modern outreach preferences.

The unknown having taking the second position is a concern that must be addressed.

CORRELATION ANALYSIS.

The scatter plot shows the relationship between number of campaign calls (x-axis) and account balance (y-axis).

Observations:

Skewed Distribution: The majority of data points are concentrated in the lower range of the x-axis (campaign calls between 1 and 10). This implies there's a steep decline in account balance as the number of calls increases.

High account Balance with Few Calls: Some individuals with very high account balances (up to 70,000) received very few calls, often only 1 or 2. This suggests that wealthier clients were either easier to reach or responded quickly, needing fewer calls.
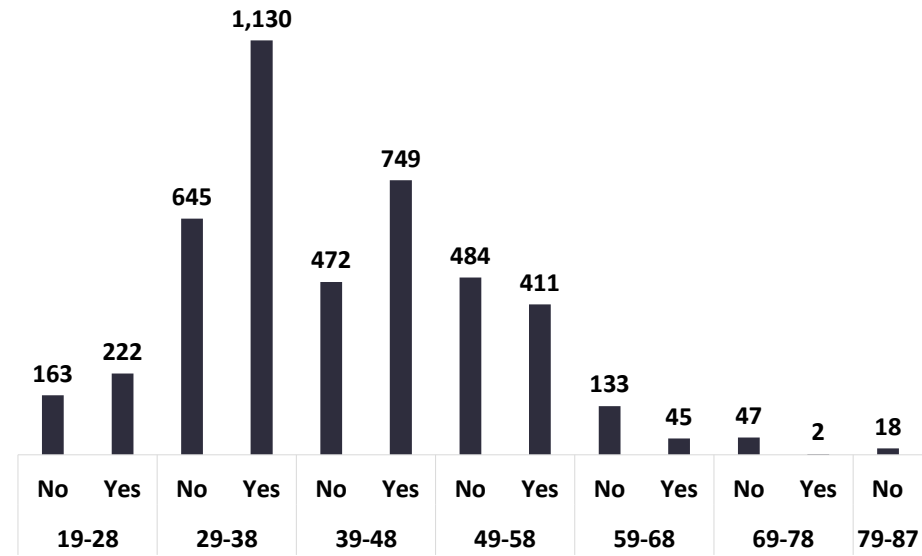
Negative Relationship:
As the number of campaign calls increases beyond 10, the account balance remains low and negative. This simply implies that repeated calls were ineffective or targeted at less financially viable customers.
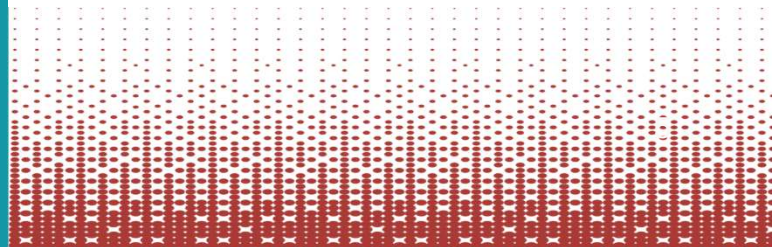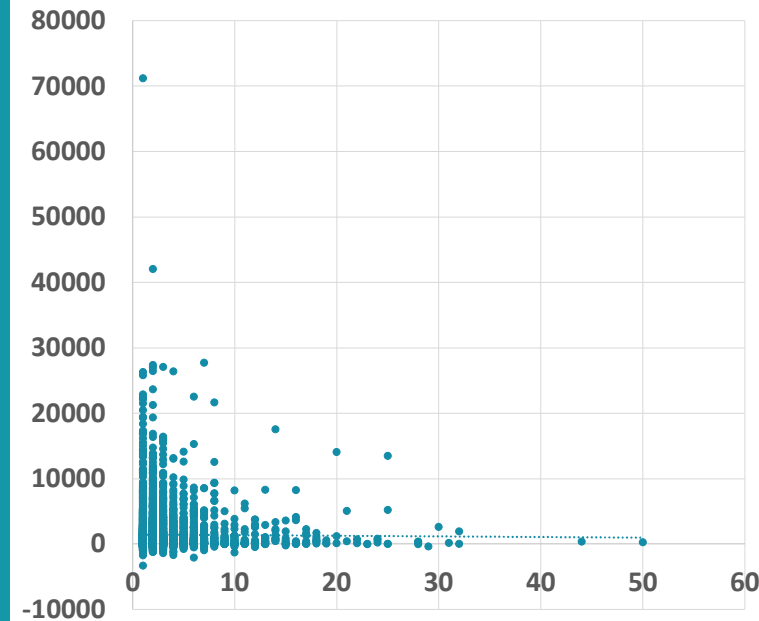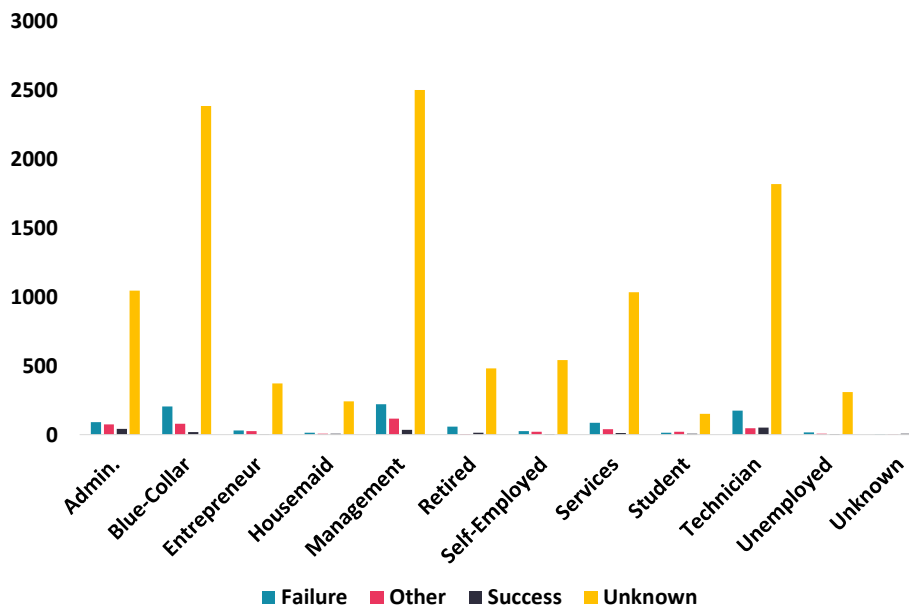
VOLUME OF CALL VS OUTCOME AND JOB ANALYSIS.

The analysis here sought to understand the volume of success or failure recorded with different job types for better inform decision.

The high yellow bars from the chart indicates high number of unknown outcome which questions the reliability and data quality for analysis.

RECOMMENDATIONS

To address low success rate the following recommendations were made:

1. Improve Data collection/Quality to reduce "Unknown" outcomes by ensuring strict compliance with data entry or through automated logging this will ensure accurate analysis.

2. Campaign and Target Refinement: Adopt a modern marketing campaign strategy by employing a professional Digital Marketer to implement modern marketing campaign such as Pay per click advertising, Social media marketing (through quality contents) and email market for a better outreach that would capture and entice the active younger population.

3. Strategic and well restructured message that resonate well with the modern, young, vibrant and tech-savvy population.

4. Rethink strategies for jobs and age groups with low success but high volume.

5. Use account balance and age insights to create more personalized campaign offers.

6. In summary, consider tailoring messaging or product offerings to the dominant age and housing segments for higher conversion potential, or explore opportunities to engage underrepresented groups.