Pillar Bank Project Documentation

1. Project Title

Direct marketing campaign Via Phone Calls.

2. Project Overview
Objective:
To uncover actionable insights that would improve future marketing campaign Strategies.
Background:
> Provide context—why the analysis is needed, business relevance, and any prior work done.

3. Data Description

Data Source/Format:

Source:InternPulse/CSV file.

Data Volume:

4521 rows.

4. Data Cleaning & Preprocessing

Steps Taken:
- Inserted Call_ID column (as primary key)
Made some data types changes
- Standardized column names
Ensured all columns containing text data type are in the proper case.
Removed the following columns: Default, Pday, Previous, and Y (irrelevant to analysis).
Created Age Group to determine the distribution by age.
Added a new column that indicates the customer's bank account status.
Tools Used:
Excel.

5. Exploratory Data Analysis (EDA)

Summary Statistics:
> Mean, outliers, etc.

Key Visualizations:
Distribution plots: Bar chart, column chart, funnel chart etc for Marirtal status, Job, Age Group, Level of Education etc
Doughnut chart and Pie chart for proportion analysis

Correlation Analysis - used Scatter Plot to establish relationship between Marketing campaign and customers' account balance and also established relationship between Age and Marketing Campaign

Used Trend/lines Chart to to study the volume of calls recorded during the campaign.

6. Challenges.

Had a little bit of challenge extracting metrics such as Credit Balance, Total overdraft and loan issued by the bank as well. At this point I had to carry out a little research to be able to perform such advanced calculation in DAX to solve the problem.