

Case 2:

Customer Retention

Visualizing customer and agent behavior.

I) ABOUT THE TASK:

Create a dashboard in Power BI for the retention manager at Phone Now He was impressed by our work and asked if you can put together a dashboard about customer retention.

It also provided us with some important aspects about what is the job and criteria for the retention area at Phone Now.

Criteria:

- Customers in the telecom industry are hard-earned: we don't want to lose them
- The retention department is here to get customers back in case of termination
- Currently, we get in touch after they have terminated the contract, but this is reactionary: it would be better to know in advance who is at risk
- We have done customer analysis with Excel: it has always ended in a dead-end
- We would like to know more about our customers: visualized clearly so that it's self-explanatory for our management

II) ABOUT THE DATABASE: "02 Churn-Dataset.xlsx"

There are records about customers with important descriptive and situational features.

Descriptive columns about the customer:

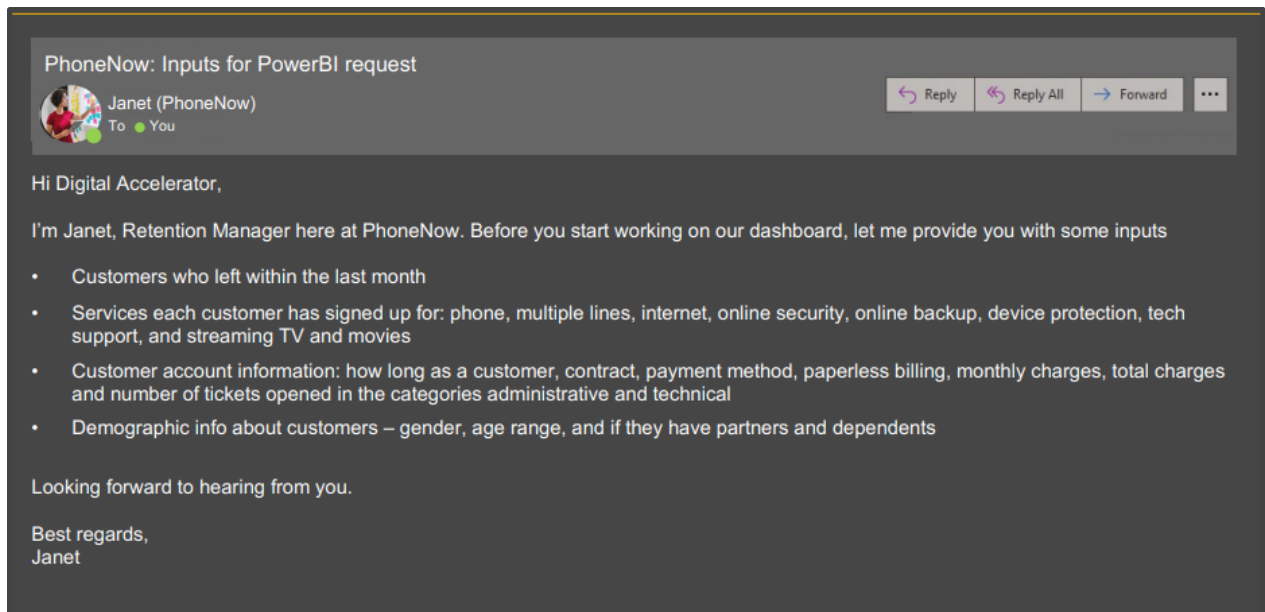
Gender, SeniorCitizen(Yes/No), Partner(Yes/No), Dependents (Yes/No), Contract

Situational columns about the customer:

Tenure, PhoneService (Yes/No), multiple lines(Yes/No/No phone service), internet service, OnlineSecurity (Yes/No/No internet service), OnlineBackup (Yes/No/No internet service), DeviceProtection, TechSupport (Yes/No/No internet service), StreamingTV(Yes/No/No internet service), StreamingMovies (Yes/No/No internet service), PaperlessBilling, PaymentMethod, MonthlyCharges, TotalCharges, numAdminTickets, numTechTickets, Churn.

Most columns are somehow easy to find what their feature say about the record although I can not find what kind of information columns “numAdminTickets” and “numTechTickets” are for. Further documentation is needed.

III) BASIC REQUIREMENTS:



According to Janet, she would like to know some information about the clients like:

- Customers who left (last month).
- Services that each client has signed up for.
- Customer account information.
- Demographic info about customers.

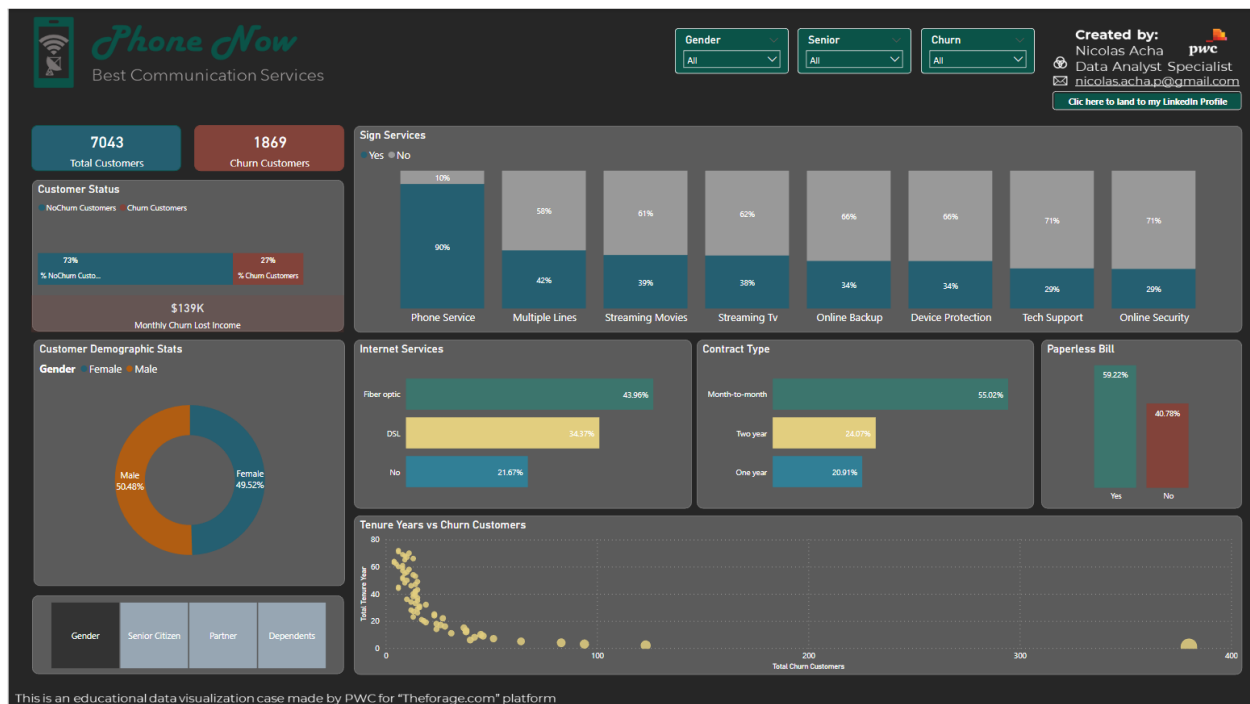
IV) Key concepts:

Customer tenure is the length of time that a customer has been with a company or has been using a product or service.

Churn in the context of business and finance, refers to the rate or moment at which customers stop doing business with a company.

V) DASHBOARD PRODUCT:

Based on the requirements we created the Power Bi Report Dashboard "[Customer Retention By Nicolas Acha.pbix](#)".



VI) INSIGHTS AND CONCLUSIONS:

By using the dashboard, I could drop some insights:

- Based on the information provided, it can be concluded that the company PhoneNow is losing a significant amount of money (\$139 k)each month due to customers leaving or "churning."
- One potential area for the company to focus on making customers to take the unsigned services. The proportion of unsigned services is big.
- Naturally, the more years a customer is tenure to PhoneNow is less likely to churn.
- I would recommend also focusing on increasing the Paperless Bill proportion due to the cost reduction of using printed paper and delivery.

Thank you for reading it. Please share it or use it for educational purposes.
nicolas.acha.p@gmail.com