

# Data Intake Report

Name: Cross selling recommendation

Report date: July 20, 2021

Internship Batch: LISUM01

Version:1.0

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Specialization: Data Analyst

Group Name: Dynasty

Data storage location: <https://github.com/NicolettePeterkin/Cross-Selling-Project-XYZ-Cedit-Union-wk7.git>

## Tabular data details:

<b>Total number of observations</b>	48
<b>Total number of files</b>	1
<b>Total number of features</b>	13647309
<b>Base format of the file</b>	.csv
<b>Size of the data</b>	2.14 GB

## Problem description:

Changing to a new selling technique requires a lot of research and data analyzing to ensure that the right cross selling strategy is used to re-enter the market. The issue XYZ credit union is having currently is that they do not know what actions to take in order to increase cross selling in the credit union.

## Business understanding:

Our goal is to create an exploratory data analysis for XYZ credit unions' dataset and create a cross-selling plan solution. The EDA report will be specific and meaningful so there is no room for assumptions. As the data analyst assigned to this project my job is to analyze the given data with much scrutiny in order to provide XYZ credit union with vital insights on cross

selling. Once the exploratory data analyze report is completed XYZ credit union will have actionable insights which can then be used to inform their cross-selling campaigns.

### **Project lifecycle and deadlines:**

#### **1. Initiation Phase (Business Understanding). - July 19<sup>th</sup> to 20<sup>rd</sup> 2021**

In this stage we will take the time to understand the goals, priorities, deadlines, and risks of the cross-selling project for XYZ credit union.

#### **2. Planning Phase – July 21<sup>th</sup> to 23<sup>th</sup> 2021**

We will use this time to clearly outline task and all the requirements for this project and data understanding (number of NA values, outliers, skewed etc.).

#### **3. Implementation (Execution) Phase – July 24<sup>th</sup> to 31<sup>st</sup> 2021**

This is where we will perform data cleansing and transformation in depth and provide an Exploratory data analysis (EDA)

#### **4. Closing Phase – August 1<sup>st</sup> to 10<sup>th</sup> 2021**

We will analyze the information from the EDA report and create a dashboard which will capture the type of customer segment wise (VIP, student etc.) customer average age and other KPIs which gives better business insight in taking decision to provide a summary of key learnings and a recommendation plan for XYZ credit union.