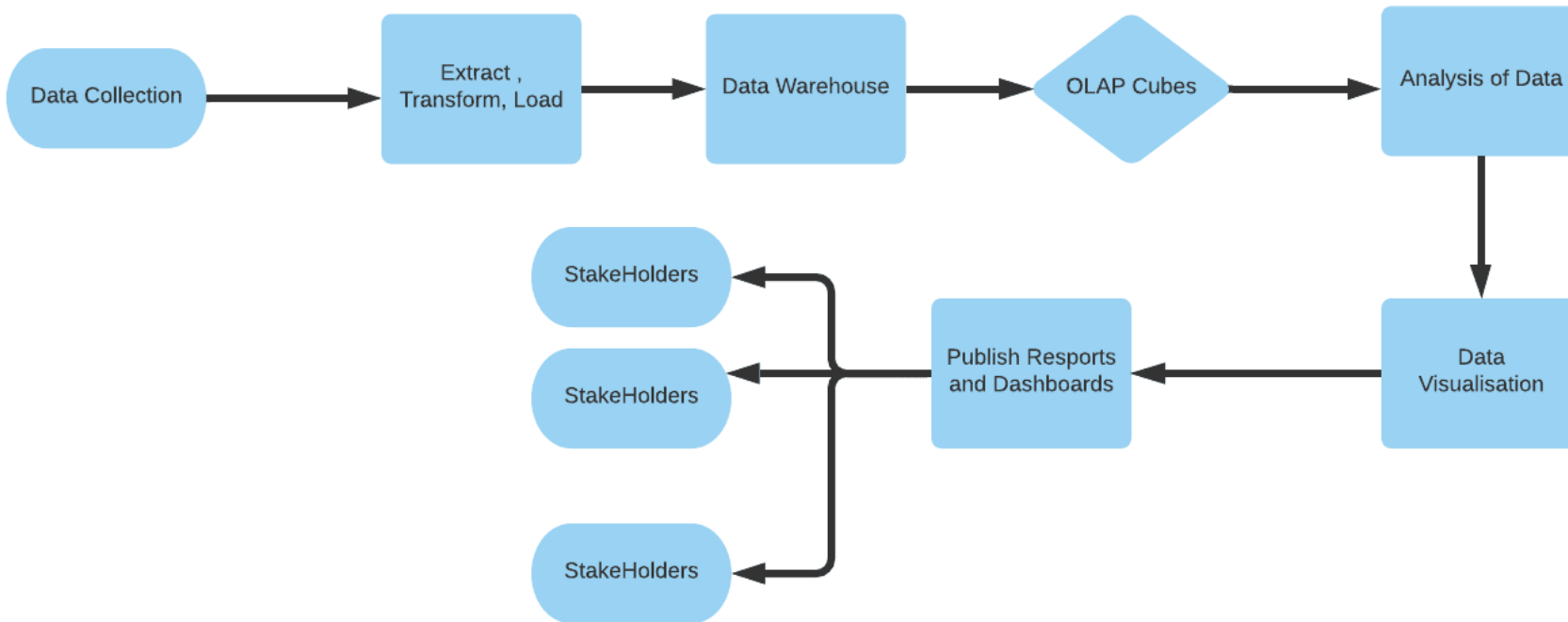


BANK MARKETING DATA ANALYSIS

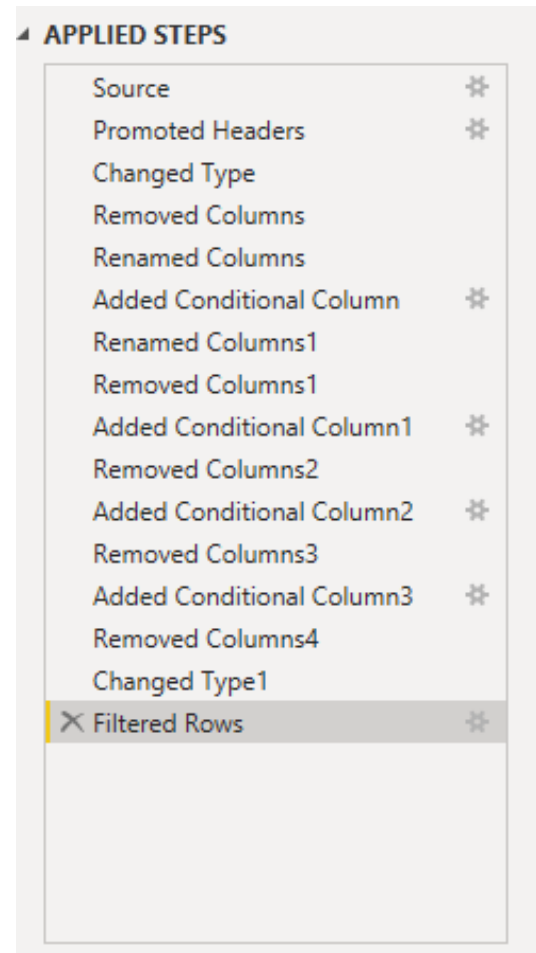
SUBMITTED BY:
ROHAN ARORA

ARCHITECTURE



ETL OPERATIONS

- Data is collected from the given dataset.
- Imported the data to Power BI Desktop
- Transformed the Data by renaming certain Columns and removing the Null Values and Errors in the Data Set
- Changed the Data type according to the Column
- Saving the changes done in Power BI Query Editor and closing the Transformation page
- Adding conditional columns to change numerical data type to categorical data type and removing unnecessary columns



PAGES IN THE REPORT PUBLISHED

- ☐ Dashboard
- ☐ Table Overview
- ☐ Treemap

DASHBOARD



TABLE OVERVIEW

Table Overview

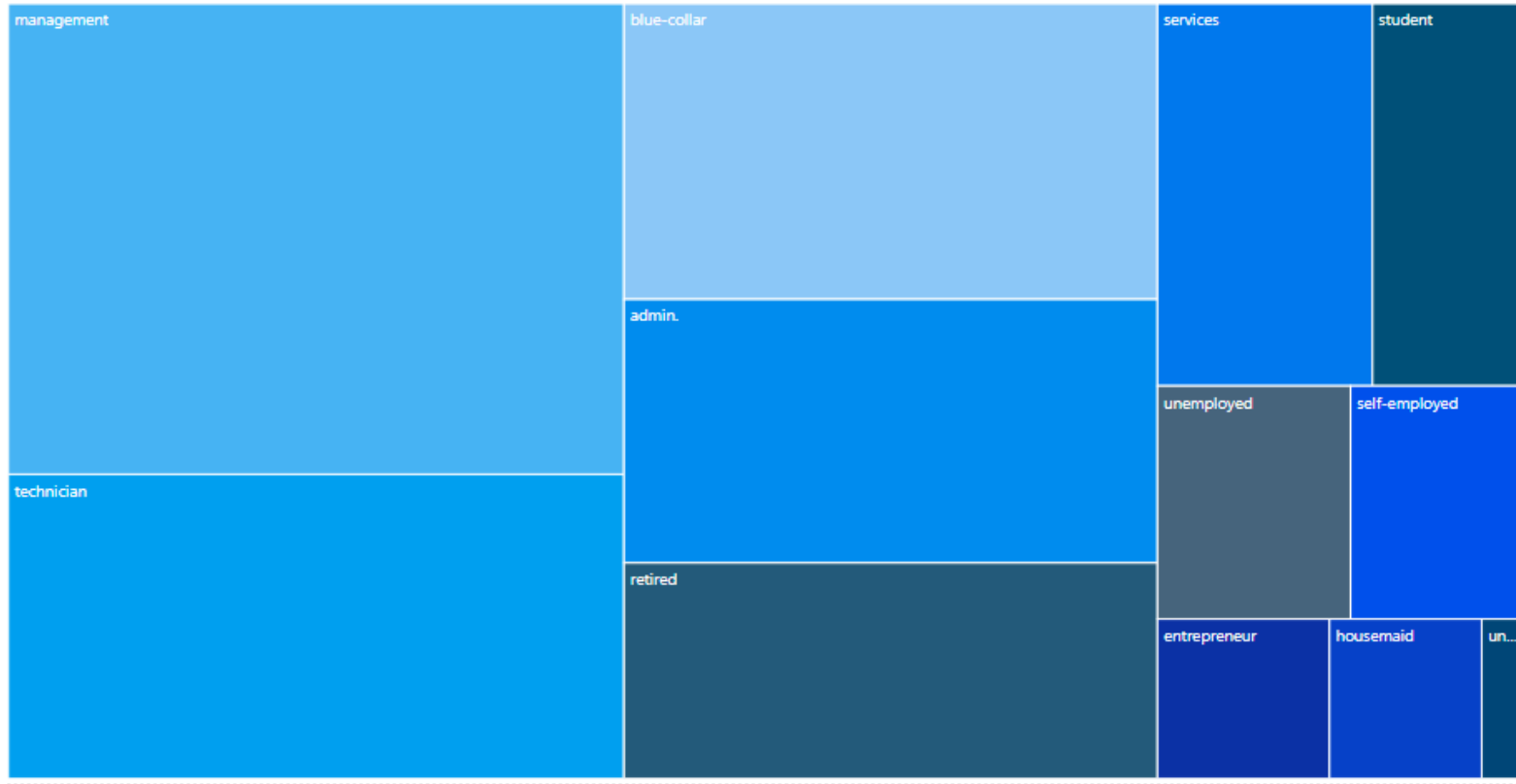
marital education	divorced				married				single	
	Term Loan Converted	Term Loan Rejected	Total Term Loan	Conversion Rate	Term Loan Converted	Term Loan Rejected	Total Term Loan	Conversion Rate	Term Loan Converted	Term
▣ tertiary	203	1268	1471	13.80%	913	6125	7038	12.97%	880	
▣ retired	27	58	85	31.76%	68	186	254	26.77%	6	
▣ student	1	2	3	33.33%	2	20	22	9.09%	56	
▣ unemployed	4	21	25	16.00%	17	113	130	13.08%	35	
▣ admin.	6	48	54	11.11%	43	199	242	17.77%	50	
▣ blue-collar		4	4		4	56	60	6.67%	20	
▣ self-employed	17	59	76	22.37%	42	408	450	9.33%	75	
▣ management	120	797	917	13.09%	563	3737	4300	13.09%	451	
▣ technician	18	157	175	10.29%	121	776	897	13.49%	147	
▣ housemaid	1	17	18	5.56%	11	103	114	9.65%	10	
▣ services	2	12	14	14.29%	7	84	91	7.69%	16	
▣ unknown		3	3		1	24	25	4.00%	3	
▣ entrepreneur	7	90	97	7.22%	34	419	453	7.51%	11	
▣ unknown	24	145	169	14.20%	142	1018	1160	12.24%	86	
▣ student		1	1		2	8	10	20.00%	41	
▣ retired	2	11	13	15.38%	28	73	101	27.72%		
▣ management	7	24	31	22.58%	36	125	161	22.36%	5	
▣ unknown	1	6	7	14.29%	11	84	95	11.58%	6	
▣ unemployed	1		1	100.00%	2	14	16	12.50%	1	
▣ self-employed		1	1		4	19	23	17.39%	1	
▣ services	3	18	21	14.29%	8	86	94	8.51%	8	

Segment with Highest Conversion Rate by Education is:

- Tertiary
- Unknown
- Secondary
- Primary

TREEMAP

Loan Converted By Job



- This Treemap depicts the **Jobs with respect to number of conversions happened.**

INSIGHTS



Conversion Rate for Customers with No Housing Loans is **higher by 8.00 %** thus they should be Targeted for next campaign

Conversion Rate of the **Senior Citizen Customers (60+ Age)** rises significantly (300%)

Conversion Rate is Directly Co-related to the Call Duration. As the Call Duration Rises the Conversion **Rate Also rises with sudden spike in 10+ minutes call with increase in conversion rate of 30%**

Total Term Loan Converted Drastically Rises after the age of 25 and Sharply Falls after the age of 35 **With Average Conversion Rate of Age 25-35 being 12.909 %**

Recommendation

The Marketing Strategy should constitute To cover Majority of Customers With **No Housing Loans**

And to Target on Customers that are above the **age of 60** to get the most efficient result on

Marketing campaign with special focus on **students** as it constitutes majority of Term Loan

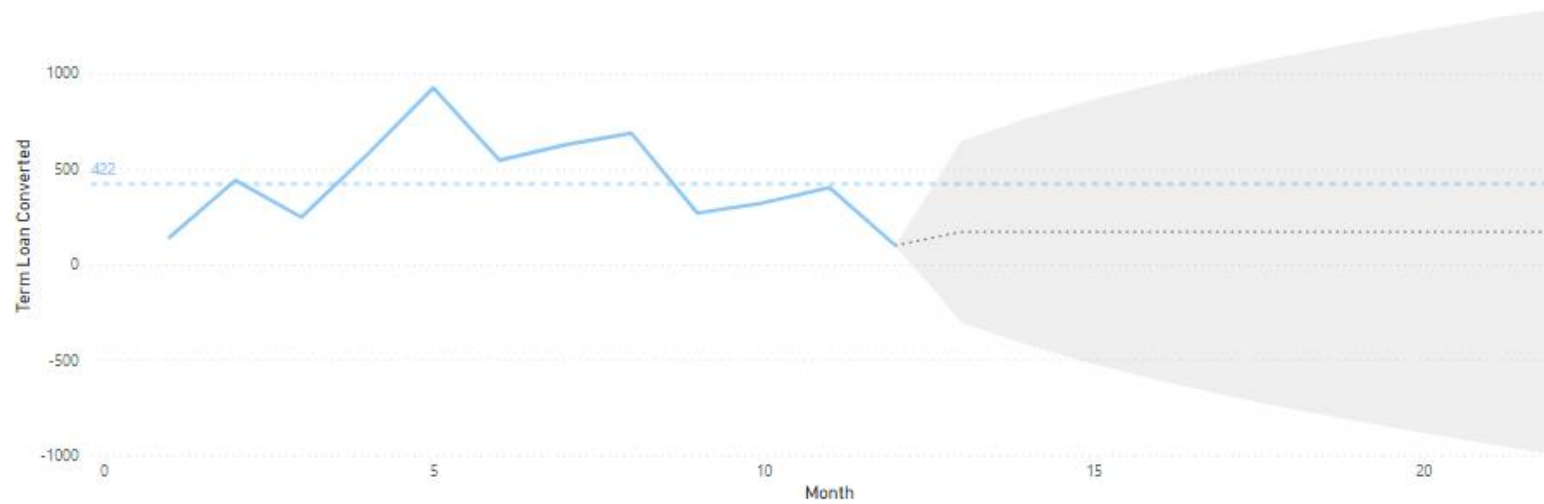
Converted in **18-25 Age Segment**

A Separate Marketing Strategy should be constituted For **Senior Citizen (60+)** Customers as they have belong to a different Segment and have a higher ROI.

As for Sales Department the **main focus Should be to increase the call Duration** with the Customers and special incentive should be given to the Employees if the Call Duration Exceeds 600 Seconds

TIME-SERIES ANALYSIS

Term Loan Converted by Month



marital

divorced	single
married	

Previous Contact

0-2 Months	2-4 Months	4-6 Months	6+ Months	No Previous Contact
------------	------------	------------	-----------	---------------------

job

admin.	entrepreneur	management	self-employed	student	unemployed
blue-collar	housemaid	retired	services	technician	unknown

Q & A

- ❑ What's the Source of the Data - Collected from Given Data Set
- ❑ What was the type of Data - Numerical and Categorical Values
- ❑ What is the flow of the project - According to the Architecture mentioned above
- ❑ How did you deploy the report - With the help of Power BI Service available to my Microsoft Account
- ❑ What results did you get - You can see the Top 10 Category slide above or download the file and slice the category you need & get the desired result