Building a Comprehensive Credit Card Dashboard for Performance Analysis

Introduction to Credit Card Dashboards

Real-Time Insights are crucial for understanding credit card performance. This presentation will explore how to build a **comprehensive dashboard** that provides valuable analytics and metrics to enhance decision-making and improve business outcomes.

Project Objective

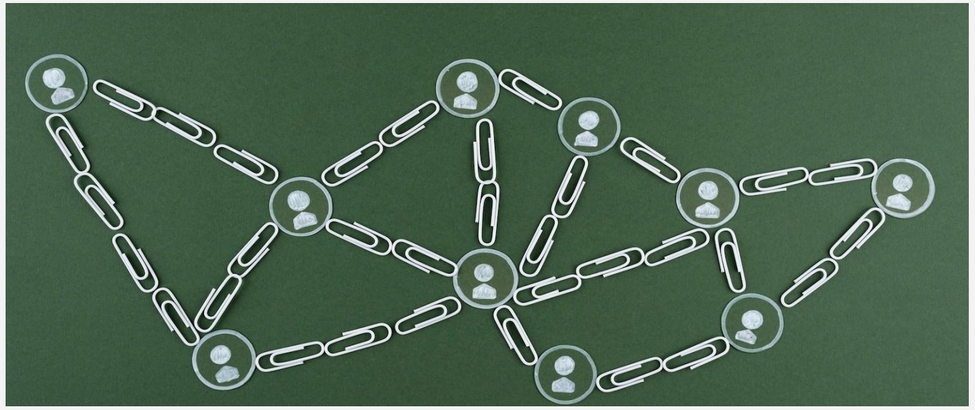
To develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations effectively.

DATA SOURCES AND INTEGRATION

Prepare CSV File: Organize your data into columns and rows using a spreadsheet or text editor. Ensure the first row contains headers. Save the file as a .csv.

Create SQL Table: Define the table structure based on the CSV data. Write a CREATE TABLE statement with columns matching the CSV headers and appropriate data types.

Import CSV into SQL: Use the SQL command (e.g., LOAD DATA in MySQL) to import the CSV file into the SQL table. Ensure the file path is correct, and the data matches the table structure. Verify the import with a SELECT * query.



Data Output | Messages | Notifications

```
COPY 10108

Query returned successfully in 82 msec.
```

Visualization Insights – Week 53 (31st Dec)

Wow Change :

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 20% & 30%
- Customer count increased by 10%

Overview YTD:

- Overall revenue is 57M
- Total interest is 8M
- Total transaction amount is 46M
- Male customers are contributing more in revenue 31M, female 26M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 68%
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%

Real-Time Analytics Benefits

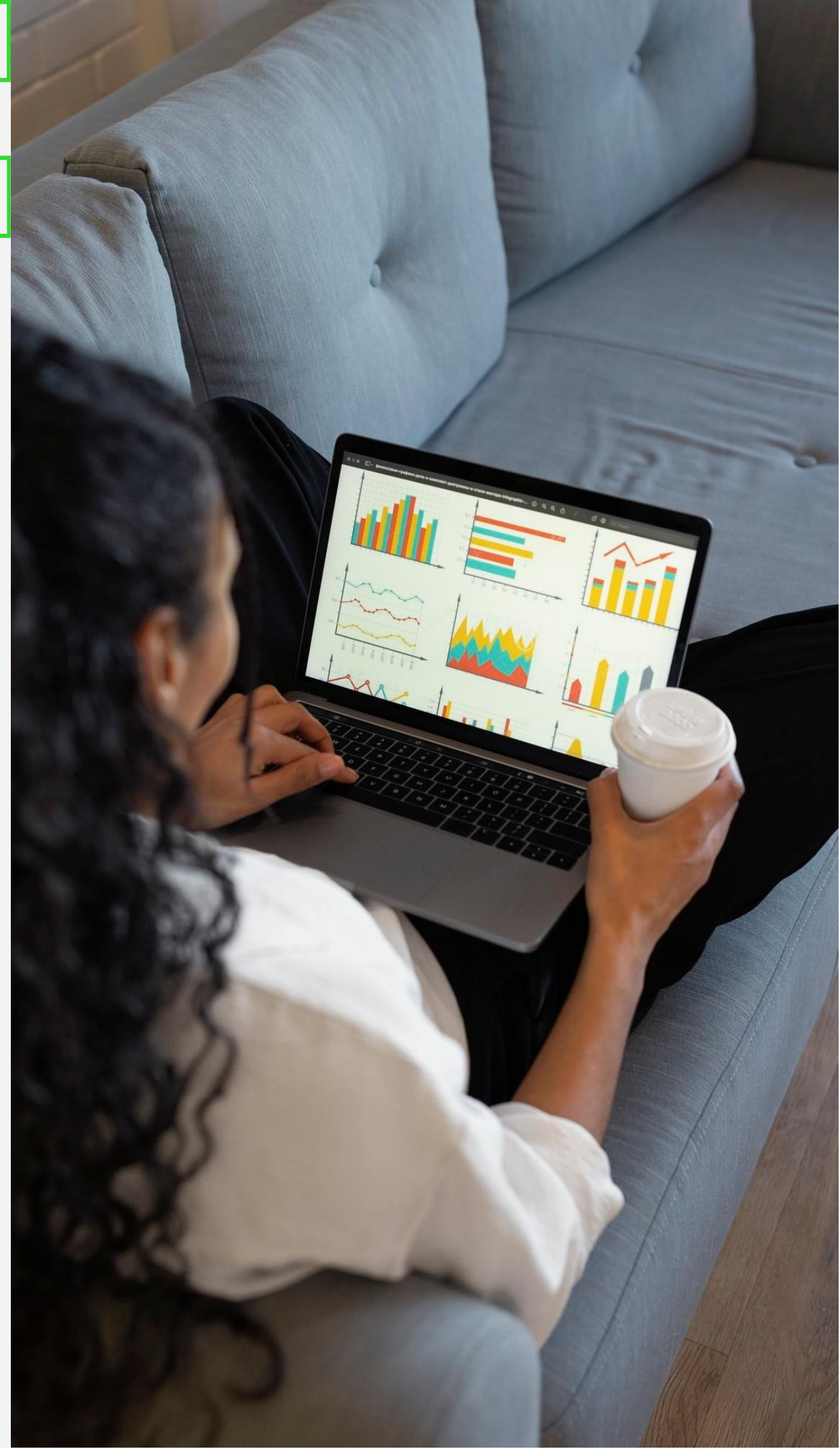
Implementing **real-time analytics** allows businesses to respond swiftly to market changes. It helps in identifying **fraudulent activities** and optimizing marketing strategies, ultimately leading to improved customer satisfaction and retention.

Credit card financial dashboard using Power BI:

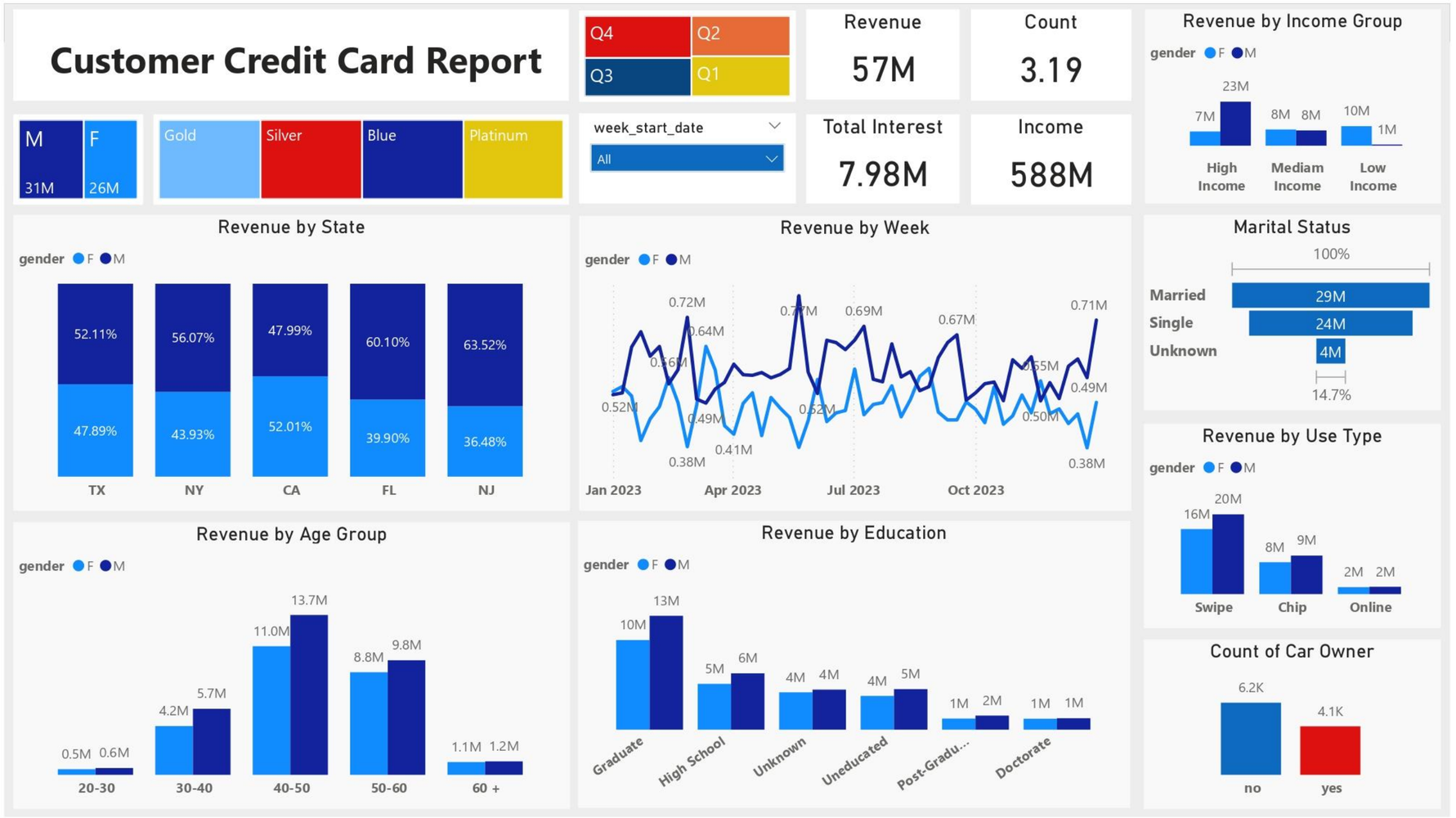
- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.

- Streamlined data processing & analysis to monitor key performance metrics and trends.

- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.



Dashboard Overview



Dashboard Overview

Credit Card Transaction Report

Low Income | Mediam Income | High Income

Q4 | Q3 | Q2 | Q1

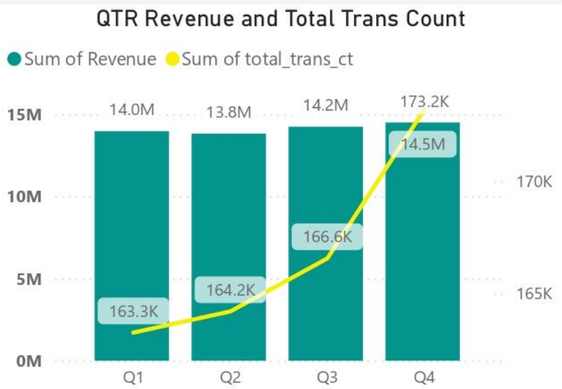
Gold | Silver | Blue | Platinum

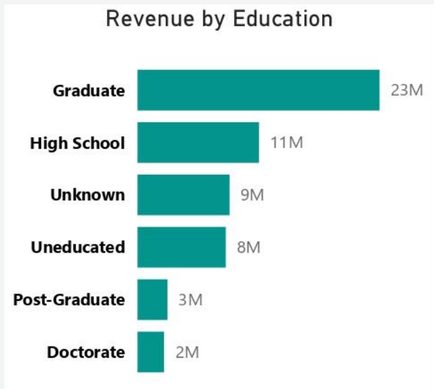
F | M

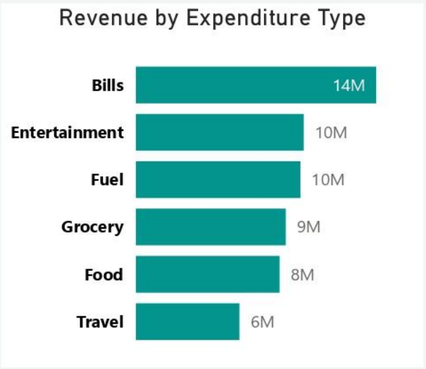
week_start_date: All

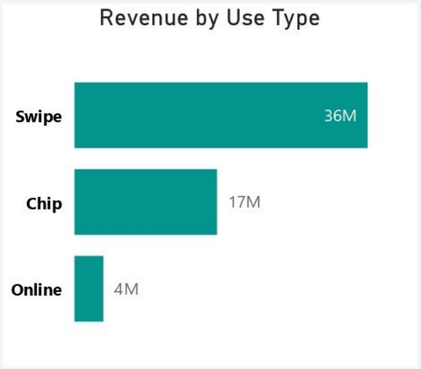
Revenue	Amount	Total Interest	Count
57M	46M	7.98M	667K

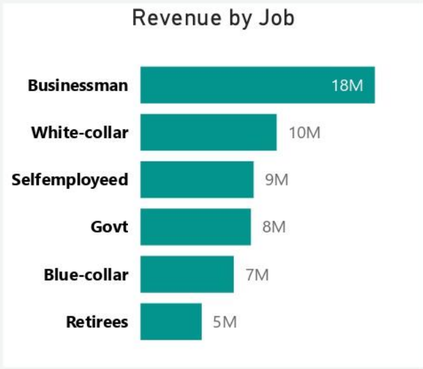
card_category	Sum of Revenue	Sum of total_trans_amt	Sum of interest_earned
Blue	47188612	37840749	6,614,172.62
Silver	5659109	4647596	821,922.98
Gold	2533682	2091362	384,755.16
Platinum	1135608	953314	161,629.05
Total	**56517011**	**45533021**	**7,982,479.81**

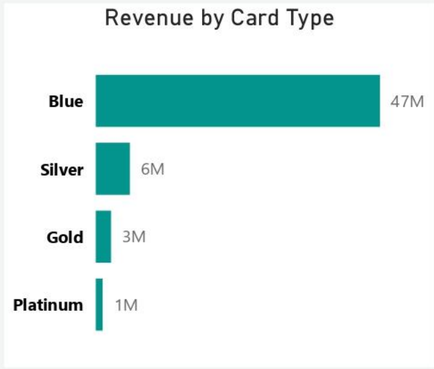












CONCLUSION AND FUTURE STEPS

In conclusion, a **comprehensive credit card dashboard** empowers organizations by providing actionable insights. Moving forward, focus on continuous improvement and adopting **emerging technologies** to enhance data analysis capabilities.

Thanks!

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Github : https://github.com/OmGurav66/Credit-Card-Dashboard
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