Group Name: Team Coltenback

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Country: United States of America

College: Drew University

Specialization: Data Analyst

GitHub Repository Link: https://github.com/RColtenback/Cross-Selling-Data-Analysis.git

Problem Description:

XYZ credit union in Latin America is performing very well in selling the banking products (e.g.: credit card, deposit account, retirement account, safe deposit box etc.). However, their existing customers are not buying more than one product which means bank is not performing well in cross-selling (Bank is not able to sell their other offerings to existing customer). XYZ Credit Union decided to approach Team Coltenback to solve their problem.

Business Understanding:

We're trying to understand the advantages and disadvantages of cross-selling banking products as opposed to up-selling. In particular, we want to know the financial benefits of cross-selling products to understand which products do well together and which should be sold alone. We also have personal information about each customer for the bank, thus we can analyze their

backgrounds and see if there is any correlation with certain personal traits (e.g.: race, age, sex, etc.).

Project Lifecycle and Deadline:

1. Business understanding

2. Data Understanding

3. Data Cleansing and Transformation

4. Exploratory data analysis

5. EDA Recommendation (PowerPoint)

6. Dashboard which should capture type of customer their count, segment wise (VIP, student, etc.) customer average age, and other KPIs which gives better business insight in taking decision.

7. Prepare a final presentation

The final deadline is scheduled for October 30th, 2022.