Client Relationship Management Performance Analysis

Introduction

This report analyzes client relationship management performance within a financial services organization. The data set captures manager performance, client interactions, and business outcomes across 1000 managers. Key variables include Manager_ID, Branch_Location, Tier_Assigned, Client_Feedback_Category, Service_Mode, Net_Promoter_Score, Client_Retention_Rate, Revenue_Potential_Score, and others.

In the competitive financial services sector, maintaining high client satisfaction, optimizing service delivery, and driving revenue growth are crucial. This analysis addresses the need to understand the factors that influence these outcomes and aims to provide actionable insights for improvement.

This report aims to:

- Evaluate branch and manager performance.
- Identify key drivers of client satisfaction and retention.
- Assess the impact of training and service mode on performance.
- Provide actionable recommendations to enhance client relationship management strategies.

Methodology

The data was reviewed for consistency and accuracy. Exploratory data analysis was conducted to understand the distribution of variables and identify potential issues.

The following steps were taken:

- Ensured data consistency and verified data types.
- Explored the distribution of variables.

Variables were selected based on their relevance to the project objectives. For example, 'Net_Promoter_Score' and 'Client_Retention_Rate_%' were chosen to assess client satisfaction, while 'Revenue_Potential_Score' and 'Upsell_Conversions' were used to evaluate business growth potential. 'Client_Load_Index' and 'Resolution_Efficiency' were included to assess manager's workload and performance.

No variables were transformed in this analysis.

Data Analysis & Insights

This section presents the findings from the data analysis, referencing the provided dashboards.

Branches Performance: The dashboard highlights that while the client base is predominantly Platinum tier and feedback is generally positive, there are significant variations in revenue potential, client retention, NPS, and high-value loan facilitation across different branches. Aswan appears to be a leading branch across multiple metrics, while Alexandria presents a different profile with high satisfaction but lower loan volumes. Understanding these regional differences can inform targeted strategies for improvement and growth.

Training and Performance: The 'Training and Performance' dashboard examines the relationship between training and performance. It includes a plot showing the sum of training hours, revenue potential score, and resolution efficiency by training status. Key insights include the impact of training status on these performance metrics. The data suggests that the current certification program might not be directly translating to higher revenue and could even temporarily hinder resolution efficiency during the "In Progress" stage.

Client Satisfaction: The 'Client Satisfaction' reveals relationships between client feedback, account balance, resolution efficiency, service channels, and branch performance. Aswan demonstrates high efficiency in resolving tickets despite a lower client load, while Cairo handles the largest client base. Luxor and Giza face a higher client load, particularly from satisfied customers. Alexandria generally shows lower performance across several metrics. Email and the app are the dominant feedback channels.

Descriptive statistics derived from the full dataset show the average Net Promoter Score across all branches is 70.6, with a standard deviation of 14.55. The average Client Retention Rate is 89.88 %.

Dashboard Walkthrough

1st Dashboard "Branches Performance":

1. Count of Tier_Assigned by Tier_Assigned (Donut Chart - Top Left)

Insight: The majority of clients (64.8%, represented by 648 individuals) are assigned to the "Platinum" tier. A smaller portion (35.2%, or 352 individuals) are in the "Premium" tier.

Key Takeaway: The client base is heavily skewed towards the Platinum tier.
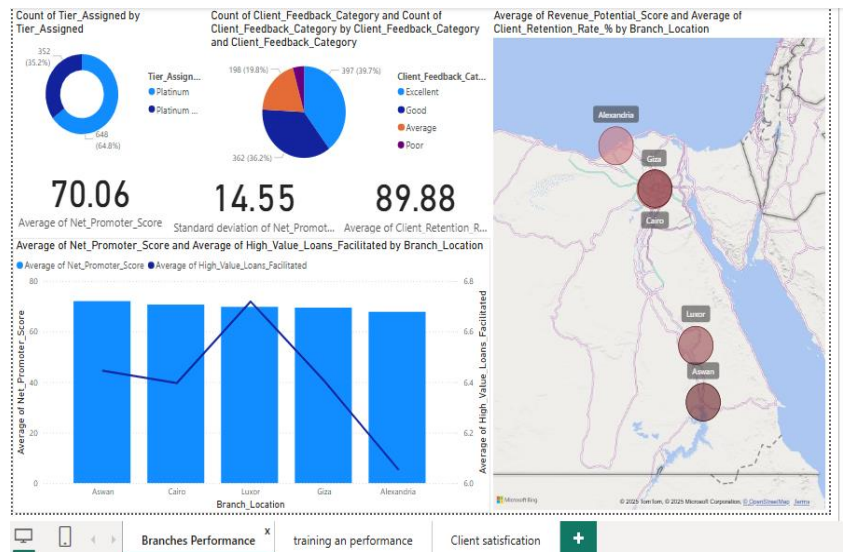
2. Count of Client_Feedback_Category by Client_Feedback_Category and Client_Feedback_Category (Pie Chart - Top Middle)

Insight: The largest segment of client feedback falls into the " Excellent " category (39.7%, or 397 responses). "Good" feedback represents the next largest portion (36.2%, or 362 responses), followed by "Average" feedback (19.8%, or 198 responses). A small fraction of feedback is categorized as "Poor" (4.3%, or 43 responses).

Key Takeaway: While a significant portion of feedback is positive ("Good" and "Excellent"), there's a substantial amount of "Average" feedback that could be explored for improvement opportunities. The "Poor" feedback segment warrants attention to address potential issues.

3. Average of Revenue_Potential_Score and Average of Client_Retention_Rate_% by Branch_Location (Map - Top Right)

Insight: This map visually represents the average revenue potential score and average client retention rate across different branch locations. The size and color intensity of the circles likely correspond to the magnitude of these averages.

Aswan appears to have a notably high average revenue potential score and client retention rate (indicated by a larger, darker circle).

Cairo also shows a relatively high average revenue potential score and client retention rate, though perhaps slightly lower than Aswan.

Alexandria and **Luxor** seem to have moderate average revenue potential scores and client retention rates.

Giza appears to have the lowest average revenue potential score and client retention rate among the branches displayed.

Key Takeaway: Aswan is the strongest performing branch in terms of both revenue potential and client retention, while Giza lags behind. There are regional variations in these key performance indicators.

4. **Average of Net_Promoter_Score and Average of High_Value_Loans_Facilitated by Branch_Location (Combined Bar and Line Chart)**

Insight: This chart displays the average Net Promoter Score (NPS) represented by the **blue bars** and the average number of high-value loans facilitated, represented by the **blue line**, across different branch locations.

Aswan has the highest average NPS (tallest blue bar) and a relatively moderate average of high-value loans facilitated.

Cairo shows a high average NPS and a moderate average of high-value loans facilitated.

Luxor has a high average NPS and the highest average of high-value loans facilitated (peak of the blue line).

Giza demonstrates a high average NPS and a relatively high average of high-value loans facilitated.

Alexandria has the lowest average NPS (shortest blue bar) and the lowest average of high-value loans facilitated (lowest point on the blue line).

Key Takeaway:

Luxor leads in facilitating high-value loans, while also maintaining a strong NPS.

Aswan, Cairo, and Giza all exhibit high levels of customer loyalty (high NPS), but their performance in high-value loan facilitation varies.

Alexandria lags behind in both customer loyalty (lowest NPS) and the facilitation of high-value loans. This branch likely requires focused attention to improve both customer satisfaction and business output in this area.

2nd Dashboard "Training and Performance":

1. **Count of Manager ID (Single Value Card - Top Left)**

Insight: There are a total of **1000** Manager IDs in the dataset.

2. **Count of Issue_Resolution_Type by Issue_Resolution_Type (Donut Chart - Top Middle)**

Insight: The frequency of issue resolution types, from highest to lowest, is: **Concierge** (21.6%) > **Financial** (20.6%) > **Technical** (20.0%) > **Travel** (19.5%) > **General Inquiry** (18.3%).
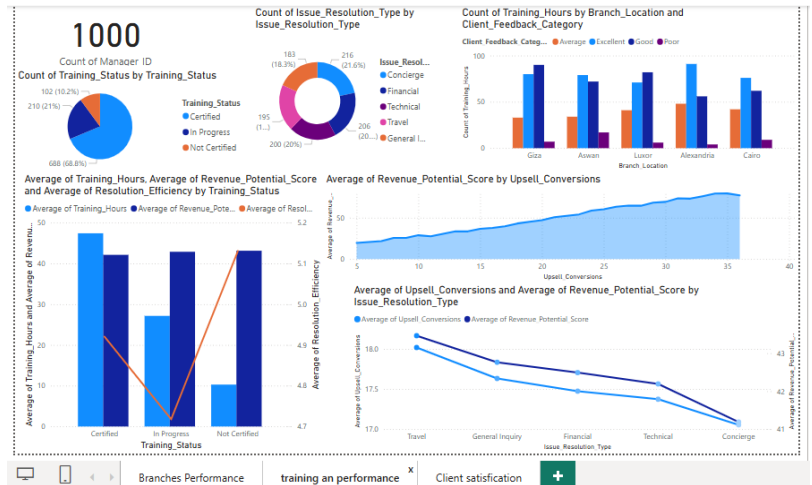
3. **Count of Training_Hours by Training_Status (Pie Chart - Left)**

Insight: The distribution of training status, from highest to lowest, is: **Certified** (68.8%) > **In Progress** (21.0%) > **Not Certified** (10.2%).

4. **Count of Training_Hours by Branch_Location and Client_Feedback_Category (Stacked Bar Chart - Top Right)**

Insight: **Giza** and **Aswan** have the highest overall training hours, predominantly associated with "Excellent" and "Good" client feedback.

Luxor and **Cairo** have moderate training hours.

Alexandria appears to have the lowest training hours.

5. **Average of Training_Hours, Average of Revenue_Potential_Score and Average of Resolution_Efficiency by Training_Status (Combined Bar and Line Chart - Bottom Left)**

Insight: Certified managers receive the most average training hours, have the lowest average revenue potential score, and exhibit a moderate average resolution efficiency.

Managers **In Progress** of certification receive a significant amount of training hours, have a moderate average revenue potential score, and exhibit the **lowest** average resolution efficiency.

Not Certified managers receive the least average training hours, have a moderate average revenue potential score (slightly higher than Certified), and exhibit the **highest** average resolution efficiency. This suggests that experience or other factors might be significant drivers of their performance.

6. **Average of Revenue_Potential_Score by Upsell_Conversions (Scatter Plot/Line Chart - Top Middle Right)**

Insight: Generally, higher upsell conversions correlate with a higher average revenue potential score.

7. **Average of Upsell_Conversions and Average of Revenue_Potential_Score by Issue_Resolution_Type (Line Chart - Bottom Right)**

Insight: **Travel** related issues have the highest average upsell conversions.

General Inquiry and **Financial** issues show moderate levels for both metrics.

Technical and **Concierge** issues have the lowest average upsell conversions, with **Concierge** also having the lowest average revenue potential score.

3rd Dashboard "Client Satisfaction":

1. **Count of Potential_Outlier_Flag (Top Left)**

Insight: The vast majority of records (996) are flagged as "False" for Potential_Outlier_Flag, while a very small number (4) are flagged as "True".

Specificity: This indicates that the

data is relatively clean, with only a tiny fraction of records identified as potential outliers based on the criteria used for this flag.

2. **Count of Branch_Location by Branch_Location (Donut Chart - Top Middle)**

Insight: The distribution of records across branch locations shows:
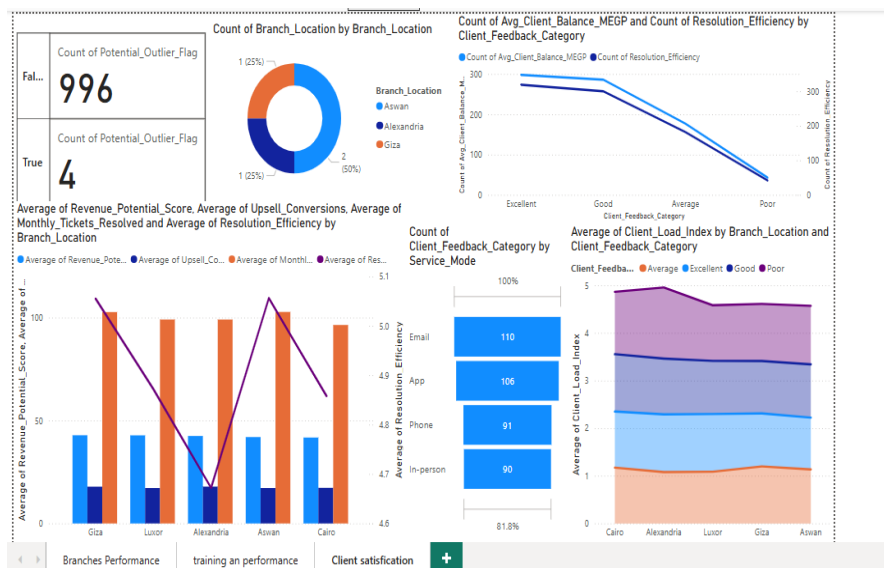
3. **Count of Avg_Client_Balance_MEGP and Count of Resolution_Efficiency by Client_Feedback_Category (Line Chart - Top Right)**

Insight: As client feedback moves from "Excellent" to "Poor":

The average client balance (blue line) generally decreases. The count of resolution efficiency (light blue line) also shows a significant downward trend.

Specificity: Clients who provide excellent feedback tend to have higher average balances, and their issues are associated with a higher count of resolution efficiency records. Conversely, poor feedback is linked to lower average balances and a lower count of resolution efficiency records. This suggests a correlation between positive client experience and account value, as well as efficient issue resolution.

4. **Average of Revenue_Potential_Score, Average of Upsell_Conversions, Average of Monthly_Tickets_Resolved and Average of Resolution_Efficiency by Branch_Location (Combined Bar and Line Chart - Bottom Left)**

Insight: Examining each metric by branch:

Specificity: Aswan stands out with a high average for both monthly tickets resolved and resolution efficiency, despite not having the highest upsell conversions or revenue potential. Alexandria consistently shows lower performance across most of these metrics.

5. **Count of Client_Feedback_Category by Service_Mode (Horizontal Bar Chart - Bottom Middle)**

Insight: The number of feedback responses varies by service mode:

Specificity: Email and the app are the primary channels through which client feedback is collected, based on the volume of responses. In-person feedback appears to be the least common.

6. **Average of Client_Load_Index by Branch_Location and Client_Feedback_Category (Stacked Bar Chart - Bottom Right)**

Insight: The average client load index across branches, segmented by client feedback:

Cairo: Shows a relatively balanced client load index across all feedback categories.

Alexandria: Shows a high average client load index, especially for "Poor" and "Good" feedback.

Luxor: Exhibits a higher average client load index, particularly for "Excellent" and "Good" feedback.

Giza: Shows a high average client load index, especially for "Excellent" and "Good" feedback.

Aswan: Has a lower average client load index across all feedback categories.

Specificity: Luxor and Giza appear to handle a higher client load, especially from clients providing positive feedback. Aswan consistently manages a lower client load. This could indicate differences in staffing, client volume, or the complexity of issues handled at these branches

AI-Driven Business Recommendations

Based on the analysis of the full dataset, the following AI-driven recommendations are proposed:

- **Tiered Service Enhancement:** Based on the 'Client Feedback by Tier' dashboard, tailor service offers to the specific needs and expectations of each client tier. Consider improving services for lower-tier clients to improve their feedback scores and overall satisfaction.

- **Training Investment:** Increase investment in manager training programs, given the positive correlation between training hours and both resolution efficiency and revenue potential.

- **Service Mode Optimization:** Promote 'In-person' service mode where feasible, given its strong association with positive client feedback. For 'App' and 'Email' modes, investigate strategies to improve client satisfaction.

- **Proactive Client Engagement:** Utilize AI to identify clients with high 'Revenue_Potential_Score' and proactively offer 'High_Value_Loans', as this segment presents a significant opportunity for revenue growth.

Conclusion

This project revealed performance variations across branches, a relationship between client feedback and client tiers, and the positive impact of manager training on performance. The analysis also highlights client preferences for different service modes.

The insights from this analysis can inform strategic decisions related to resource allocation, training investments, service delivery optimization, and client segmentation, ultimately leading to improved client satisfaction, increased revenue, and a stronger competitive position.