



# Bank Marketing Analysis Dashboard

Total Clients

41.19K

Clients Contacted

32.59K

Total Subscriptions

4.64K

Conversion Rate (%)

11.27%

Housing Loans

21.58K

Loans

6.25K

marital

divorced

education

university....

job

admin.

blue-collar

entrepreneur

housemaid

management

no

retired

self-employed

services

student

technician

unemployed

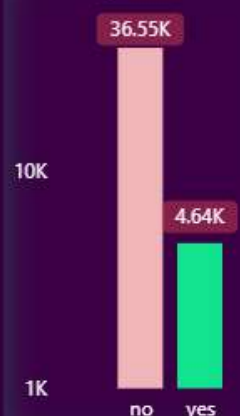
Insights &  
Narrative

Click Here

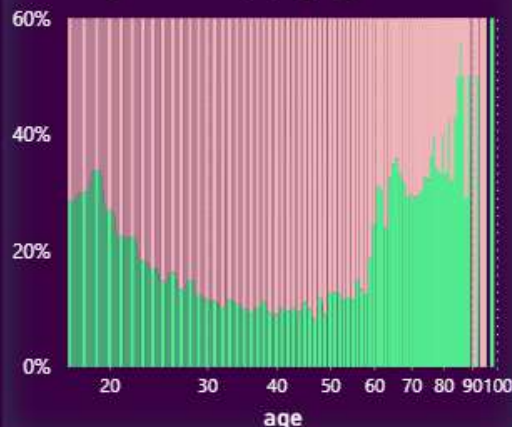
Subscription status by Job



Subscription Rate



Subscription Rate (%) by age

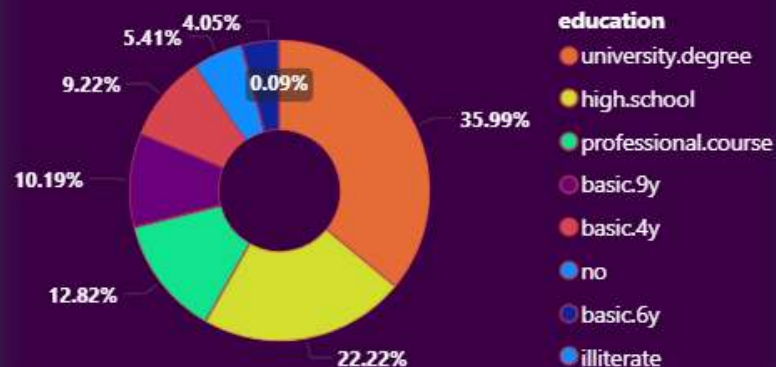


Clients Subscribed over time



No of Times Contacted	Total Clients	Total Subscriptions	Conversion Rate (%)
7	1		
0	35,563	3,141	8.83%
1	4,561	967	21.20%
2	754	350	46.42%
4	70	38	54.29%
3	216	128	59.26%
6	5	3	60.00%
5	18	13	72.22%
Total	41,188	4,640	11.27%

Total Subscriptions by education



marital status



# Bank Marketing Campaign – Insights & Recommendations

This page summarizes key insights and strategic recommendations derived from the bank's direct marketing campaign data. The analysis focuses on client subscription behavior, contact effectiveness, and demographic patterns. These findings aim to support data-driven decisions for improving future campaign performance and targeting strategies.

SingleSubs  
2K

RetiredSubs  
434

StudentSubs  
275

These segments show strong subscription behavior despite smaller volumes. Targeting them with tailored messaging may improve campaign ROI.

## Key Insights

The overall conversion rate is **11.27%**, with **4,640** subscriptions out of **41,188** clients. Clients contacted multiple times show significantly higher conversion: From **8.83%** (0 contacts) to **72.22%** (5 contacts).

**Retired and student** clients have high subscription rates despite smaller volumes.

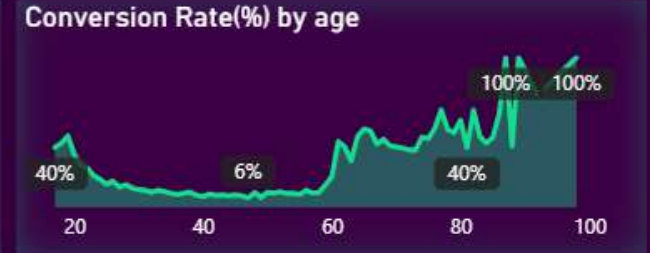
**May and August** are peak months for subscriptions, suggesting seasonal effectiveness.

**University graduates** account for **36%** of all subscriptions — **education level is a strong predictor**.

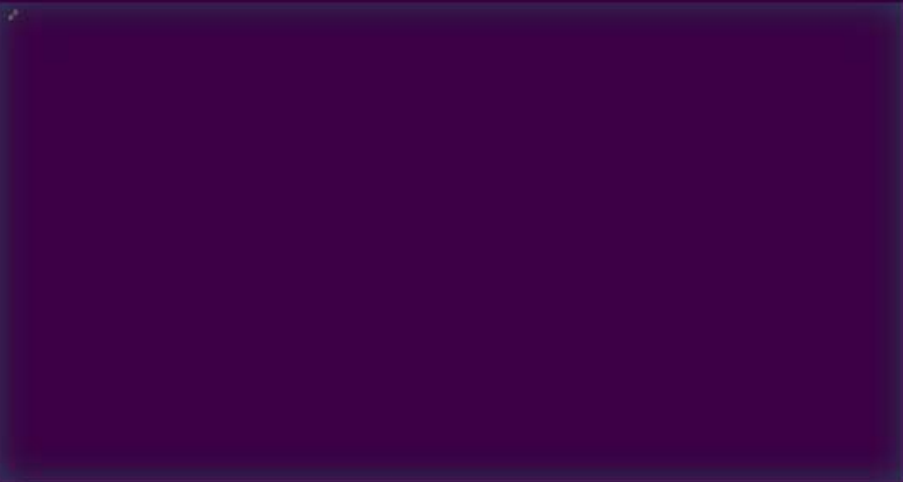
**Married clients** subscribe more than singles or divorced, but **single clients** show higher conversion rates.

**Age distribution** shows **strong engagement among middle-aged clients (30–60)**, with some outliers in younger and older groups.

Segment	RetiredRate	StudentRate	SingleRate
Retired	25.23%	31.43%	14.00%
Single	25.23%	31.43%	14.00%
Student	25.23%	31.43%	14.00%
Total	25.23%	31.43%	14.00%



**Retired, student, and single clients** consistently show high conversion rates. These segments are ideal for targeted follow-ups and personalized messaging.



## Recommendations

Focus follow-up efforts on clients with **1–3 prior contacts** to maximize ROI.

Target campaigns toward **retired, student, and university-educated** segments.

Launch campaigns in **May and August** for better performance.

Consider personalized messaging for **single clients** to boost conversion.

Use age-based segmentation to tailor offers for middle-aged clients.





# Campaign Story: From Outreach to Impact

A data-driven journey through client engagement and strategic outcomes



## Intro Paragraph

This page presents a strategic narrative of the bank's direct marketing campaign — connecting key insights to business impact. While the previous page focused on detailed analysis, this summary distills the campaign's performance into a clear story for decision-makers. It highlights what worked, where opportunities lie, and how data-driven targeting can shape future success.



## Overview

The bank launched a direct marketing campaign targeting **41,188 clients**. The goal: drive subscriptions to term deposits through personalized outreach and strategic timing.



## What Worked

- Follow-up wins:** Clients contacted multiple times converted up to **72.22%**
- Education matters:** University graduates contributed **36%** of subscriptions
- Segment success:** Retired (25.23%) and student (31.43%) clients showed high conversion
- Timing boost:** **May and August** were peak months for engagement



## Challenges & Opportunities

- Singles** had fewer subscriptions but higher conversion rates — personalize outreach
- Middle-aged clients (30–60)** dominated volume but younger/older groups showed untapped potential
- Cellular contact** outperformed telephone — digital-first strategies may yield better results



## Strategic Recommendations

Focus on clients with **1–3 prior contacts** for optimal ROI  
Prioritize retired, student, and university-educated segments  
Time campaigns around **May and August**  
Personalize outreach for single and middle-aged clients



## Business Impact Summary

With a conversion rate of **11.27%**, the campaign secured **4,640 subscriptions**. These insights pave the way for smarter targeting, better timing, and more impactful future campaigns.



## Key Takeaway

This storytelling page bridges technical analysis with business strategy — demonstrating how data-driven insights can shape smarter marketing decisions and improve client engagement.



## Closing Paragraph

**Strategic Outlook** The campaign achieved a conversion rate of **11.27%**, securing **4,640 subscriptions**. By refining targeting strategies and optimizing timing, future campaigns can drive even greater engagement and ROI. These insights form the foundation for smarter segmentation, personalized outreach, and data-driven decision-making.

Home

Insights & Summary

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