Bank Marketing Analysis Dashboard

Total Clients	Clients Contacted	Total Subscriptions	Conversion Rate (%)	Housing Loans	Loans
41.19K	32.59K	4.64K	11.27%	21.58K	6.25K

marital
- divorced

education
- university....

job
- admin.
- blue-collar
- entrepreneur
- housemaid
- management
- no
- retired
- self-employed
- services
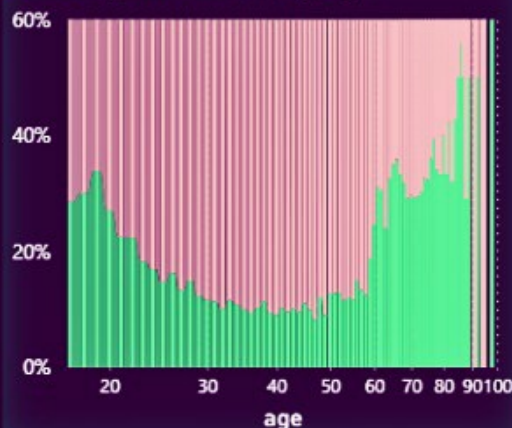- student
- technician
- unemployed

Insights & Narrative
Click Here

Subscription status by Job

Job	Value
admin.	1352
technician	730
blue-collar	638
retired	434
management	328
services	323
student	275
self-employed	149
unemployed	144
entrepreneur	124
housemaid	106
no	37

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%

Subscription Rate

- 36.55K (no)
- 4.64K (yes)

Subscription Rate (%) by age

Total Subscriptions by education

- 4.05%
- 5.41%
- 0.09%
- 9.22%
- 35.99%
- 10.19%
- 12.82%
- 22.22%

education
- university.degree
- high.school
- professional.course
- basic.9y
- basic.4y
- no
- basic.6y
- illiterate

Clients Subscribed over time

Month	Value
may	886
jun	559
apr	539
aug	655
nov	416
mar	276
jul	649
oct	315
sep	256

marital status

Total Subscription 4640

- married 2532
- single 1620
- divorced 476
- no 12

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.
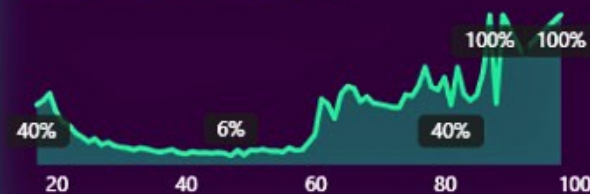**May and August** are peak months for subscriptions, suggesting seasonal effectiveness.
University graduates account for **36%** of all subscriptions — **education level is a strong predictor.**
Married clients subscribe more than singles or divorced, but **single clients** show higher conversion rates.
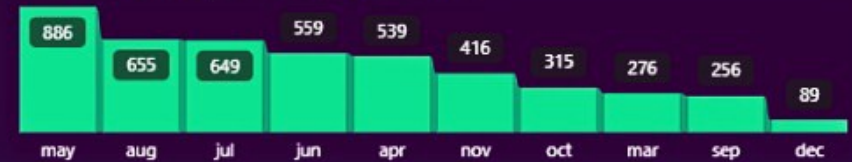**Age distribution** shows **strong engagement among middle-aged clients (30–60)**, with some outliers in younger and older groups.

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%**

Conversion Rate(%) by age

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

Month-wise Subscriptions from top to lower

886 · 655 · 649 · 559 · 539 · 416 · 315 · 276 · 256 · 89
may · aug · jul · jun · apr · nov · oct · mar · sep · dec

Subscription Rate by Number of Previous Contacts

8.83% · 21.20% · 46.42% · 59.26% · 54.29% · 72.22% · 60.00%
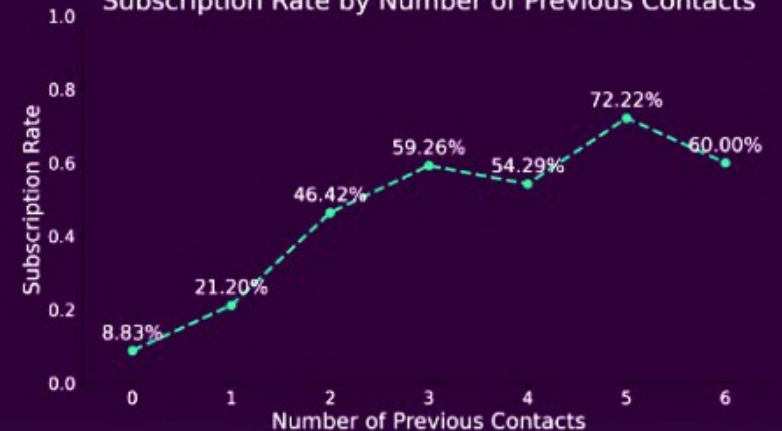
👨‍💼 Recommendations

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

By Sushant Kumar Yadav