Target Customer Profiles

Success rate by Education

Education

primary

secondary

tertiary
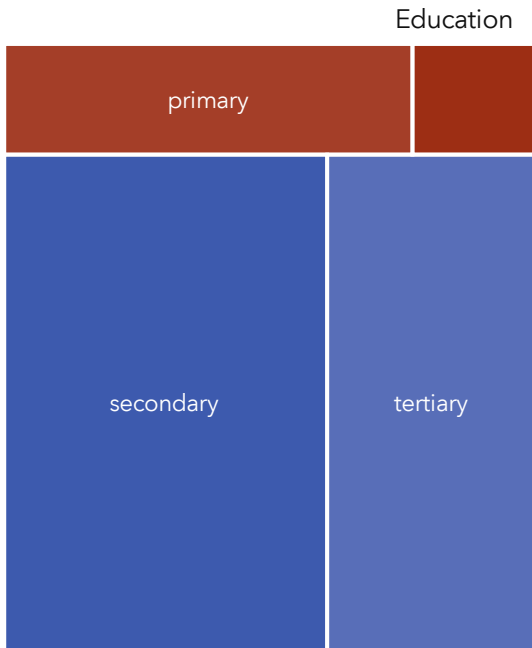
Success rate by Job Occupation

Job

admin.

services

retired

student

unemployed

self-employed

management

blue-collar

technician

Average Customer Age
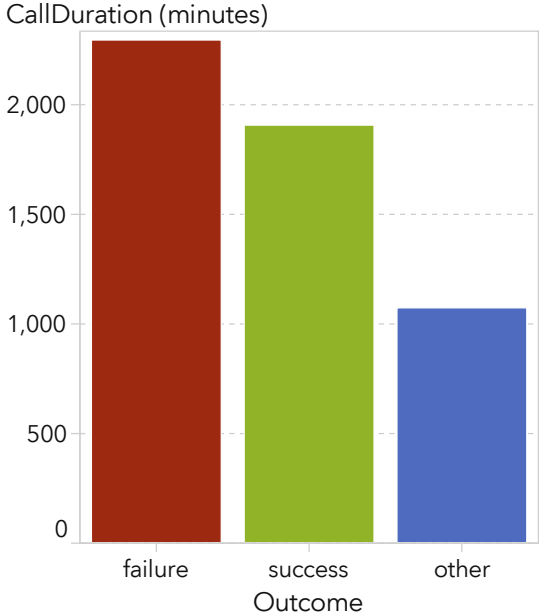
0 — 100

41.21475

A1.1

Average Call Time by Outcome

CallDuration (minutes)

Outcome	
2,000	
1,500	
1,000	
500	
0	

failure   success   other
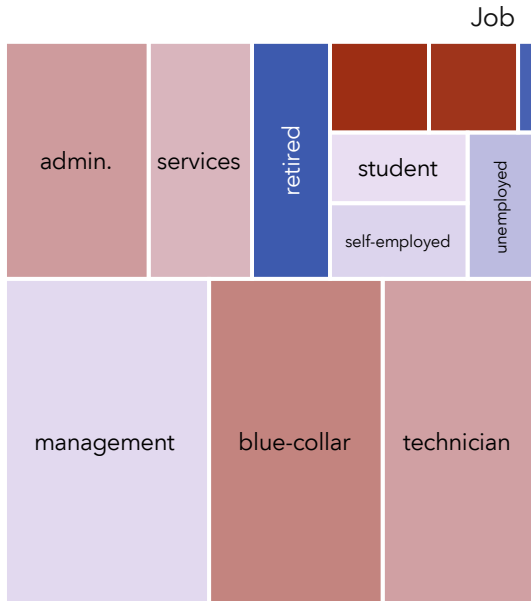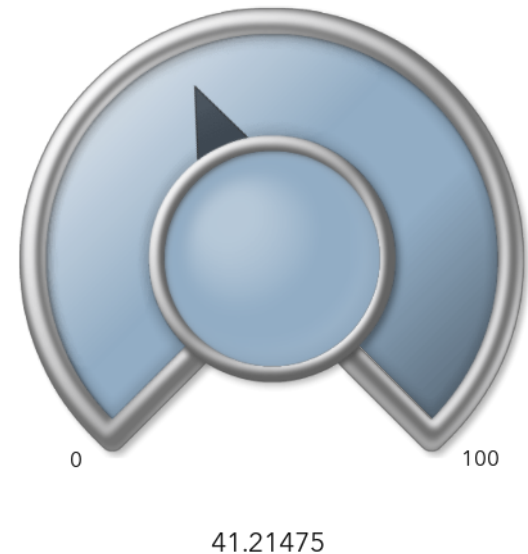
Outcome

▼ *A1.2*

Success rate by Marital status

Marital Status

single

divorced

married
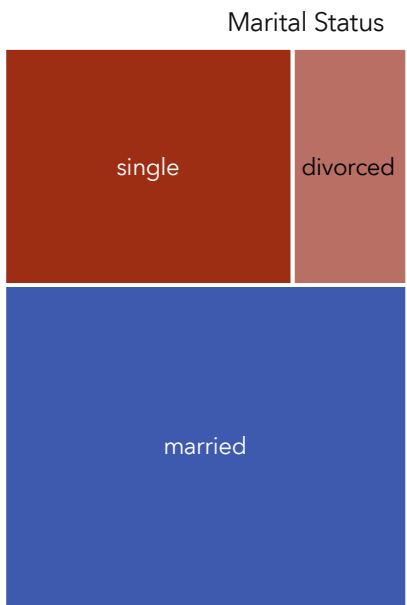
Product Ownership

HasCarIns... ▲	HasHouseInsurance ▲	HasCarLoan ▲
No	No	No
		Yes
	Yes	No
		Yes
Yes	No	No
		Yes
	Yes	No
		Yes
Total		

Success rate by Communication Method

Communication Method

cellular

telephone

Average Balance by Outcome

Balance

2000	
1500	
1000	
500	
0	

success   failure   other
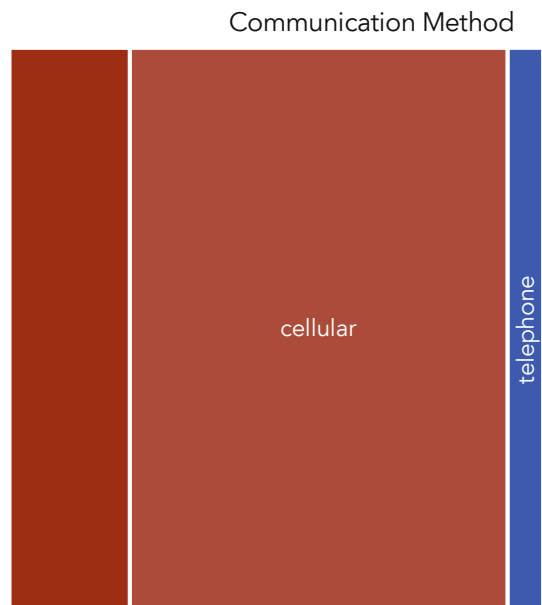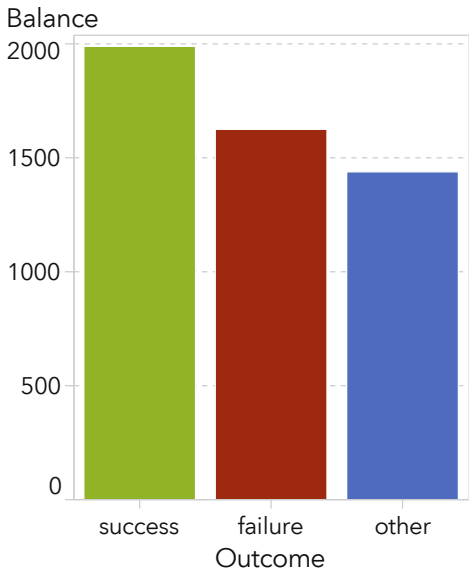
Outcome

▼ *A1.3*

Target Customer Success Rate

Education

Education

secondary

tertiary

primary

Account Balance

Balance Group

5000-9999

0-4999

< 0

Job Occupation

Job

blue-collar

management

technician

student

self-employed

unemployed

housemaid

entrepreneur

services

admin.

retired

Age Group

Age Group

69-85 - Retirement Age

35-51 - Middle Aged

18-34 - Young Adult

52-68 - Older Adult
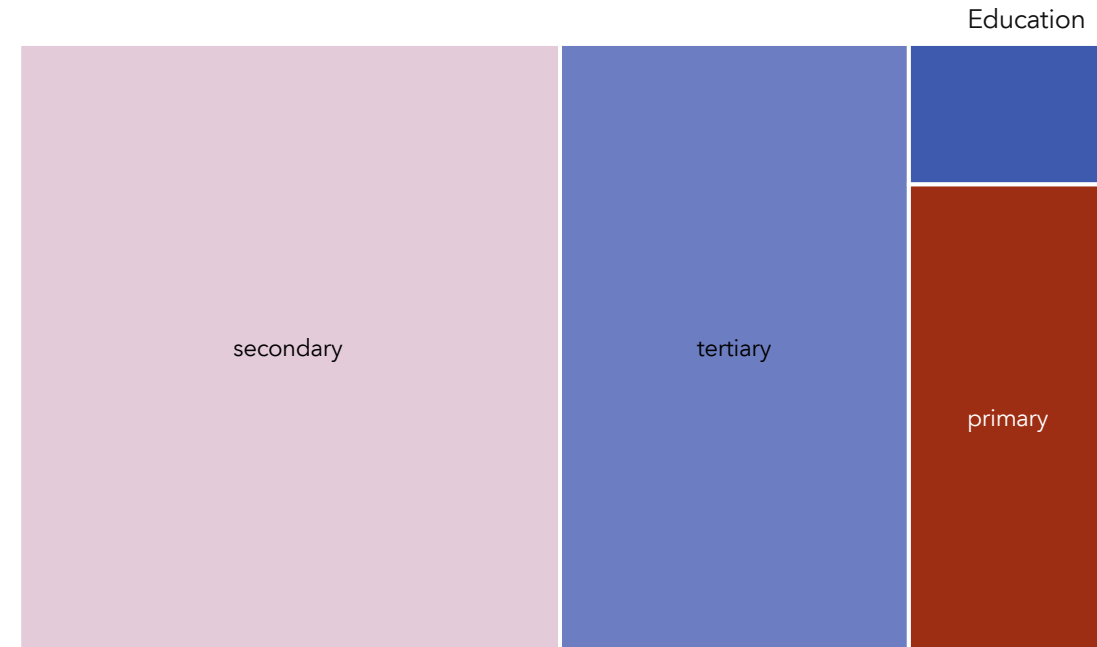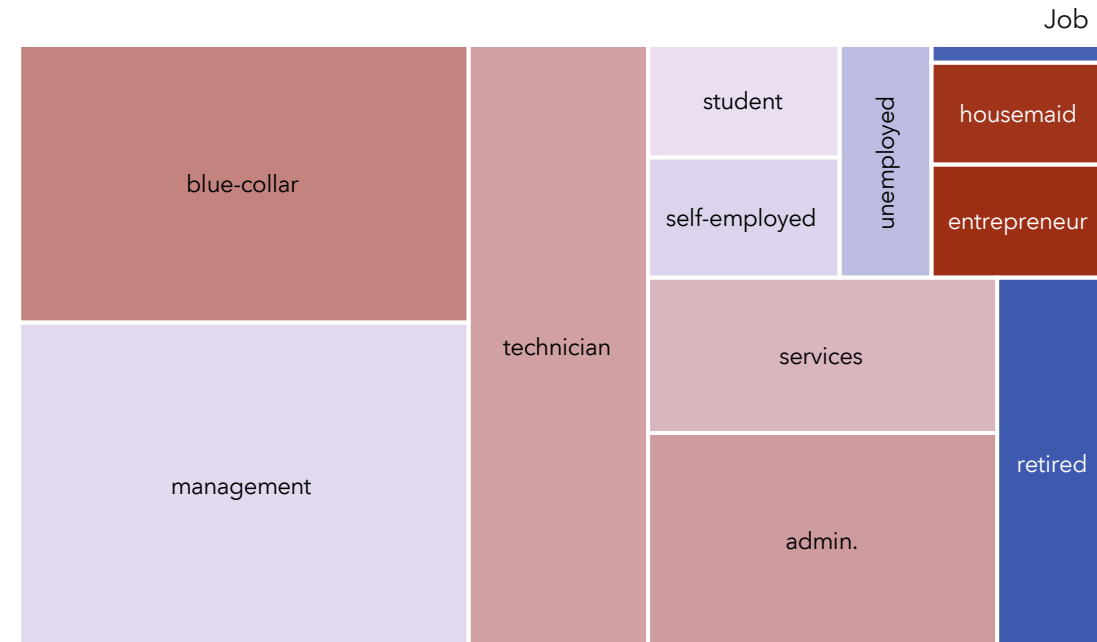
Sale Team Performance

Call Volume (grouped by day and outcome)

Frequency
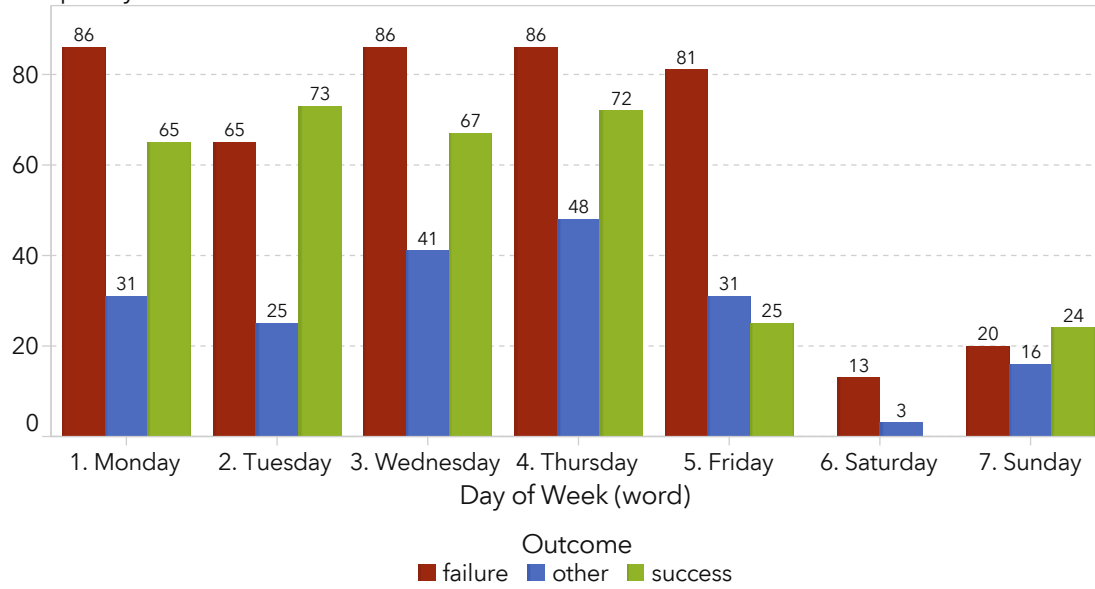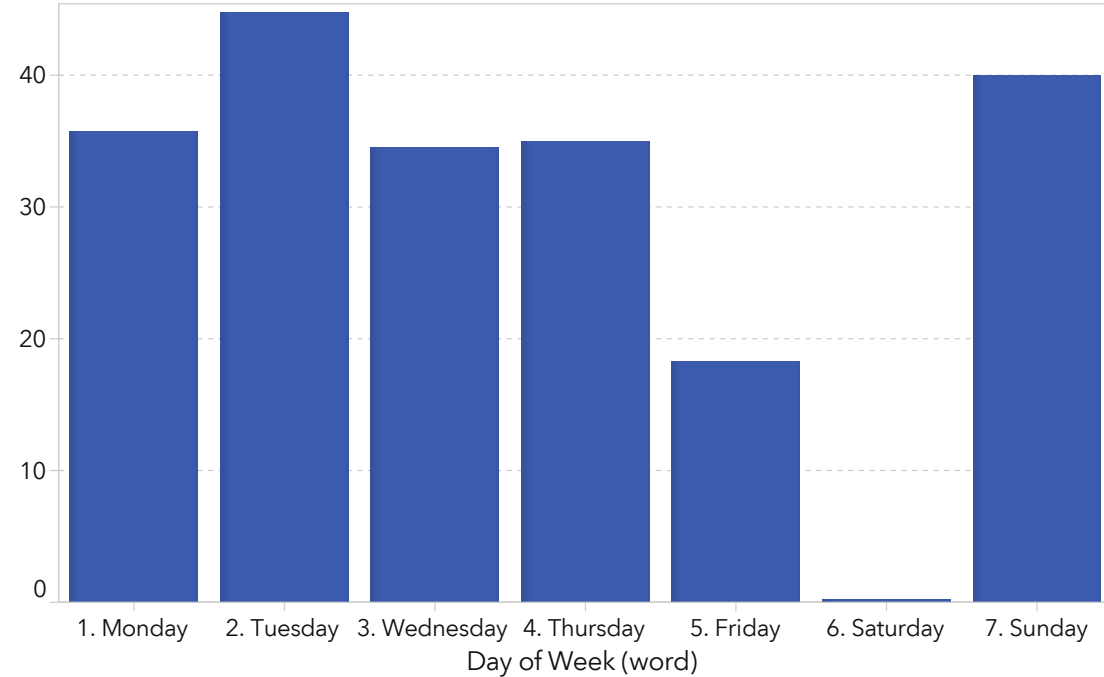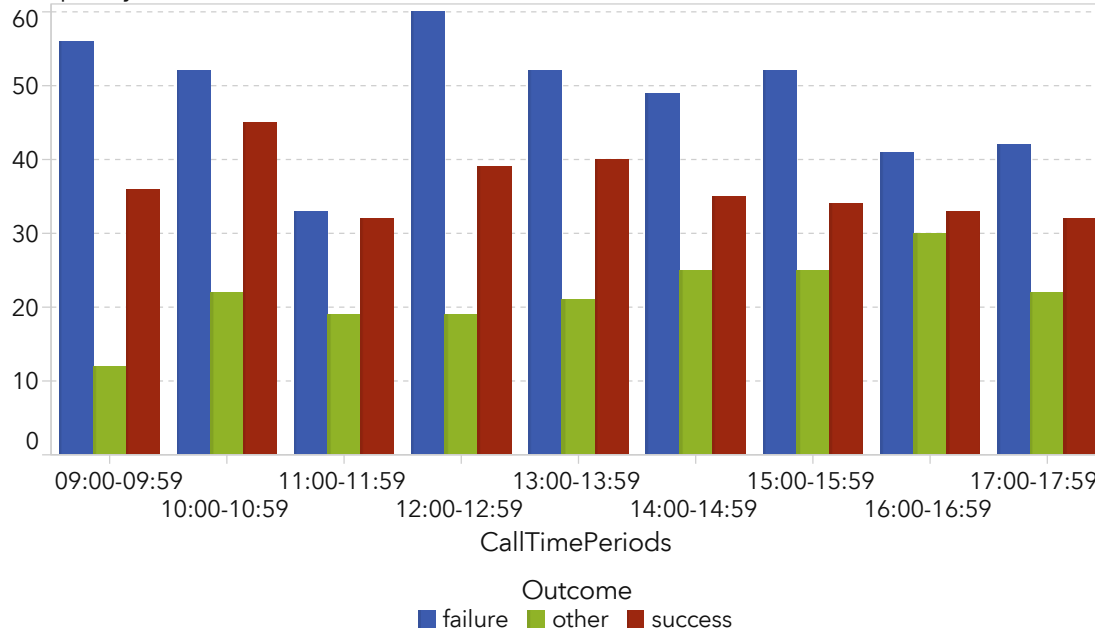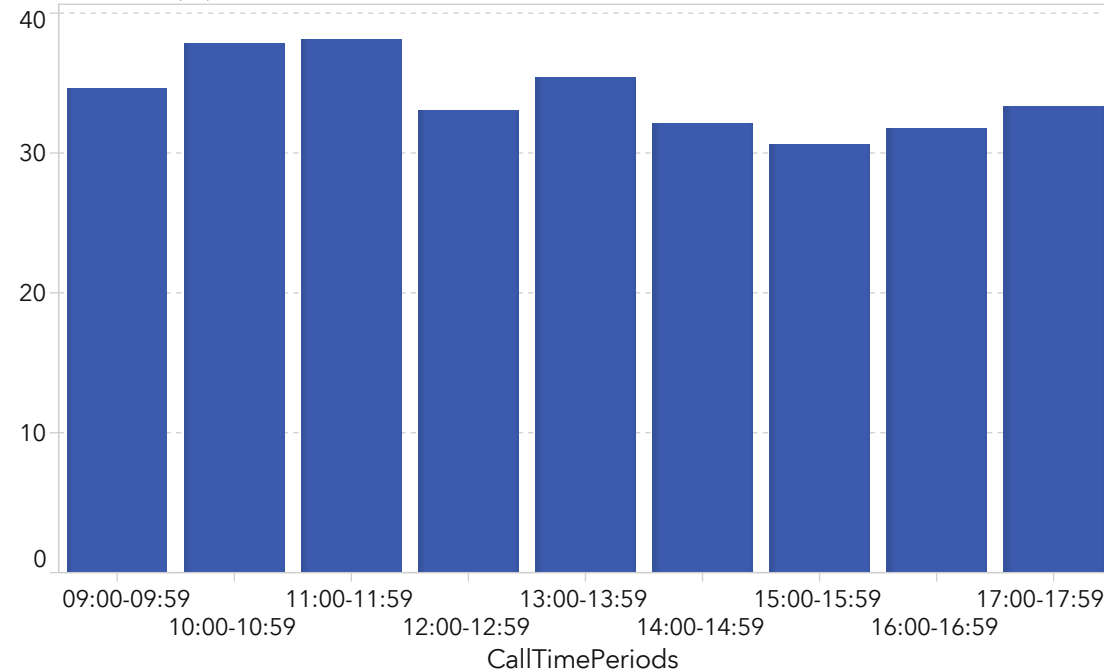
Day of Week (word)

Outcome
- failure
- other
- success

▼ *A2.1*

Success Rate (%)

Day of Week (word)

Frequency

CallTimePeriods

Outcome
- failure
- other
- success

▼ *A2.2*

Success Rate (%)

CallTimePeriods

New Sale Success Performance (Actual vs. Forecast)

Success Rate (%)

LastContactMonthNum

▼ *A3.4*

Renewal Success Performance (Actual vs. Forecast)

Success Rate (%)

LastContactMonthNum

▼ *A3.5*

Cross Sell Performance (Actual vs. Forecast)

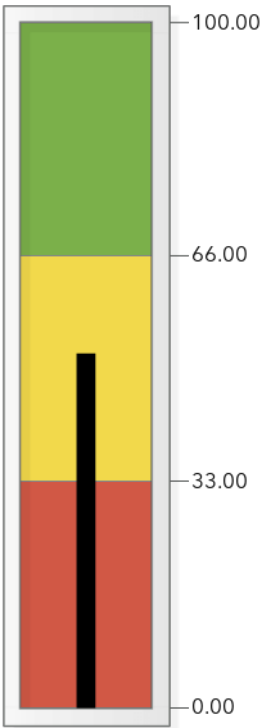Success Rate (%)

LastContactMonthNum
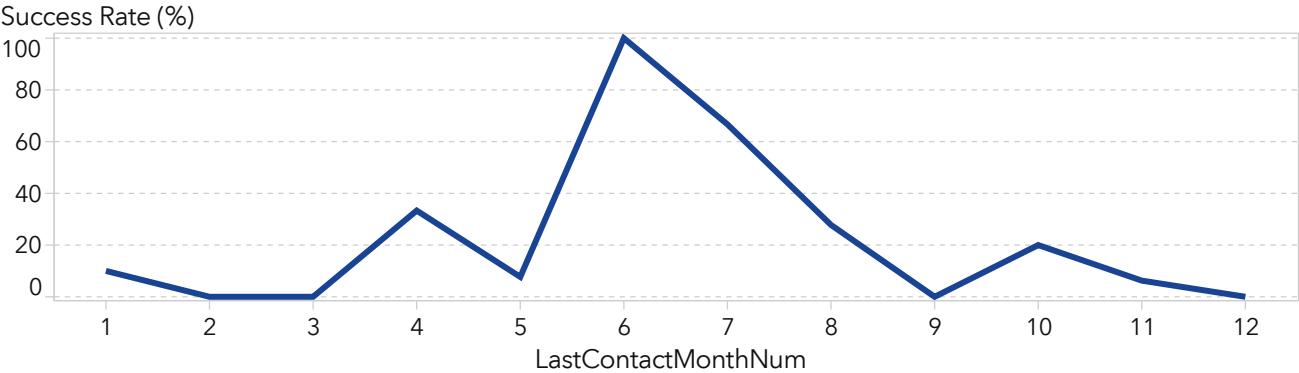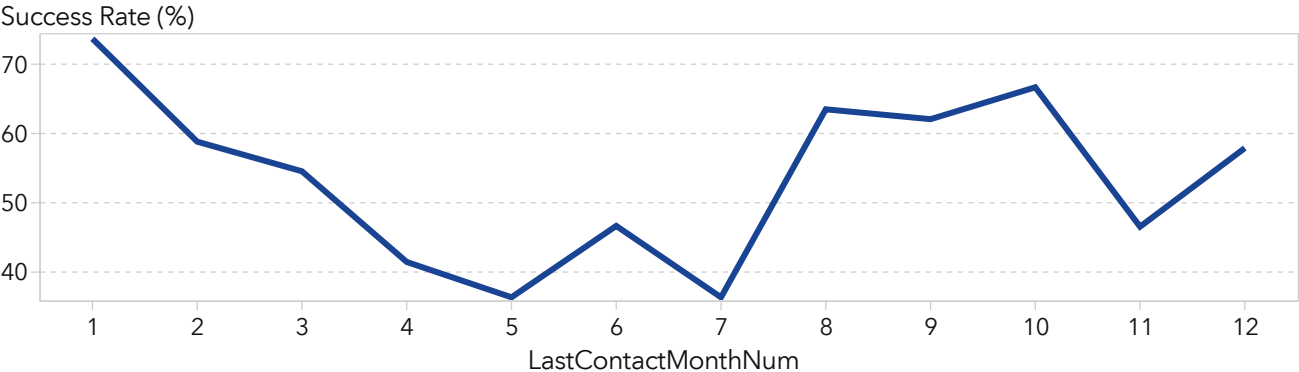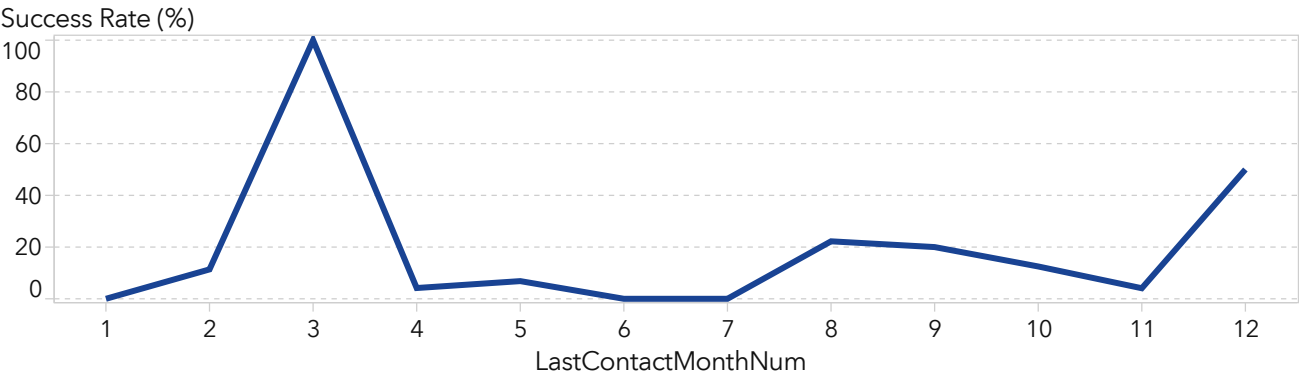
▼ *A3.6*

New Customer Sale Success Rate (%)
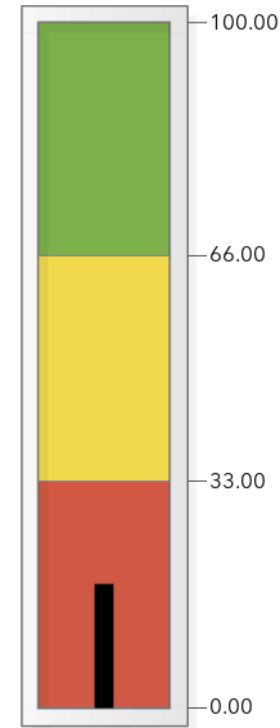
18.09

▼ *A3.1*

Renewal Success Rate (%)

51.72

▼ *A3.2*

Cross Sale Success Rate (%)
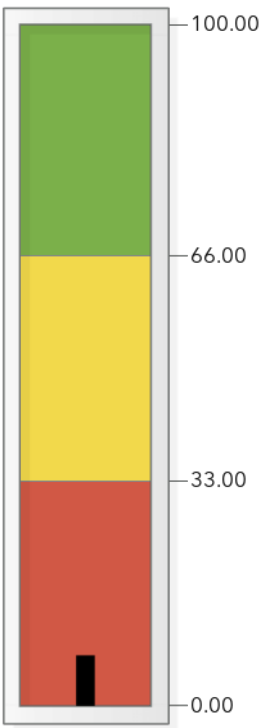
7.40

▼ *A3.3*

A1.1	Average Customer Age

Display Rules

KPI
- 🟦 0 ≤ x < 100

A1.2	Average Call Time by Outcome

Filters

Communication Method In(ALL)
Outcome NotMissing

Display Rules

Graph
- 🟩 success
- 🟥 failure
- 🟦 other
- ⬜ Other

A1.3	Average Balance by Outcome

Filters

Outcome NotMissing

Display Rules

Graph
- 🟩 success
- 🟥 failure
- 🟦 other
- ⬜ Other

A2.1	Call Volume (grouped by day and outcome)

Filters

Outcome NotMissing

A2.1 Call Volume (grouped by day and outcome)

Display Rules

Graph
- 🟩 success
- 🟥 failure
- 🟦 other

A2.2 Bar Chart 1

Filters

Outcome NotMissing

A3.1 New Customer Sale Success Rate (%)

Filters

(Customer Relation In('None')) AND Customer Relation NotMissing

Display Rules

KPI
- 🟥 0 ≤ x < 33
- 🟨 33 ≤ x < 66
- 🟩 66 ≤ x ≤ 100

A3.2 Renewal Success Rate (%)

Filters

(Customer Relation In('Car and House Insurance'; 'Car Insurance'; 'Car Insurance, Car Loan and House Insurance')) OR Customer Relation Missing

Display Rules

KPI
- 🟥 0 ≤ x < 33
- 🟨 33 ≤ x < 66
- 🟩 66 ≤ x ≤ 100

A3.3 Cross Sale Success Rate (%)

Filters

(Customer Relation In('Car Loan'; 'Car Loan and Car Insurance'; 'House Insurance'; 'House Insurance and Car Loan')) OR Customer Relation Missing

A3.3   Cross Sale Success Rate (%)

Display Rules

KPI
- 🟥 0 ≤ x < 33
- 🟨 33 ≤ x < 66
- 🟩 66 ≤ x ≤ 100

A3.4   New Sale Success Performance (Actual vs. Forecast)

Filters   (Customer Relation In('None')) AND Customer Relation NotMissing

A3.5   Renewal Success Performance (Actual vs. Forecast)

Filters   (Customer Relation In('Car and House Insurance'; 'Car Insurance'; 'Car Insurance, Car Loan and House Insurance')) OR Customer Relation Missing

A3.6   Cross Sell Performance (Actual vs. Forecast)

Filters   (Customer Relation In('Car Loan'; 'Car Loan and Car Insurance'; 'House Insurance'; 'House Insurance and Car Loan')) OR Customer Relation Missing