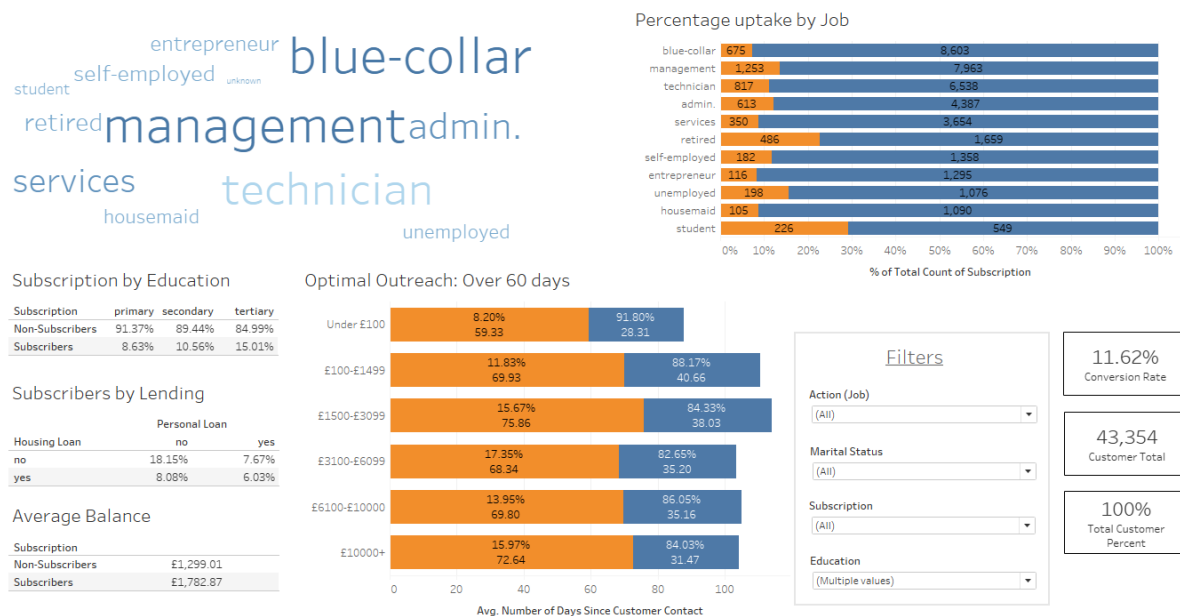


Marketing Campaign to Discover Prime Contact Opportunities – User Guide

[Link to Dashboard](#)

Marketing Campaign to Discover Prime Contact Opportunities



Welcome to the user guide for the Prime Contact Opportunities dashboard. This guide will walk you through the features and functionalities of this dashboard, helping you make the most of it.

1. Logging in:

- Start by logging into the dashboard on the link above using your credentials provided by your administrator.

2. Dashboard Overview:

- Upon logging in, you will be directed to the dashboard landing page.
- The Prime Contact Opportunities dashboard provides a comprehensive view of the contact strategy relating to different aspects of customers lives. This is broken down into age bracket, employment, education, balance, optimal outreach time and current lending.

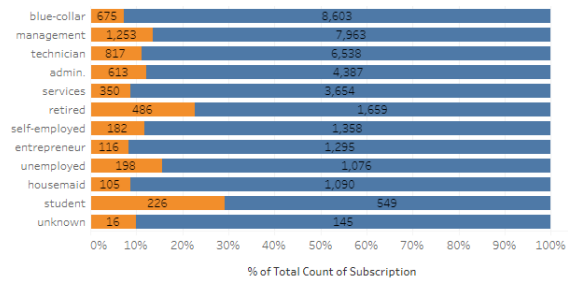
3. Navigation:

- The dashboard is a one0page dashboard with all information in one place.

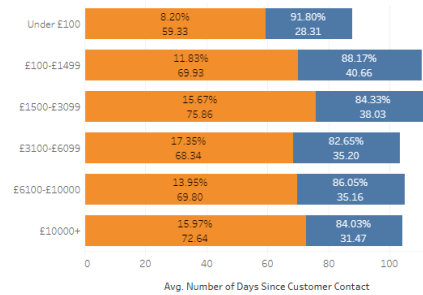
4. Data Visualisation and Interactivity:

- The Prime Contact Opportunities dashboard presents data in visual formats; word cloud, bar charts, text tables and important information highlight cards
- Interact with the visualisations by following these instructions:

Percentage uptake by Job



Optimal Outreach: Over 60 days



Bar charts: hover over the different parts of the bar chart to see a tooltip pop up containing a highlight table. The left visualisation highlight table reveals whether they were subscribers, that total count of subscription and the percentage total in subscriptions for that job role. The right visualisation highlight reveals whether they were subscribers, the average time between contacts and the percentage total for that balance bracket.

Subscription by Education

Subscription	primary	secondary	tertiary
Non-Subscribers	91.37%	89.44%	84.99%
Subscribers	8.63%	10.56%	15.01%

11.62%
Conversion Rate

Subscribers by Lending

Housing Loan	Personal Loan	
	no	yes
no	18.15%	7.67%
yes	8.08%	6.03%

43,354
Customer Total

Average Balance

Subscription	
Non-Subscribers	£1,299.01
Subscribers	£1,782.87

100%
Total Customer Percent

Text tables and Information Cards: highlight the percentage of subscribers and important information for each area, these update depending on the filters chosen.

Filters

Action (Job)

(All)

Marital Status

(All)

Subscription

(All)

Education

(Multiple values)

Filters: click the dropdown and highlight all relevant fields to narrow down the data