

DataVerse

Data visualization for Finance

Group 6

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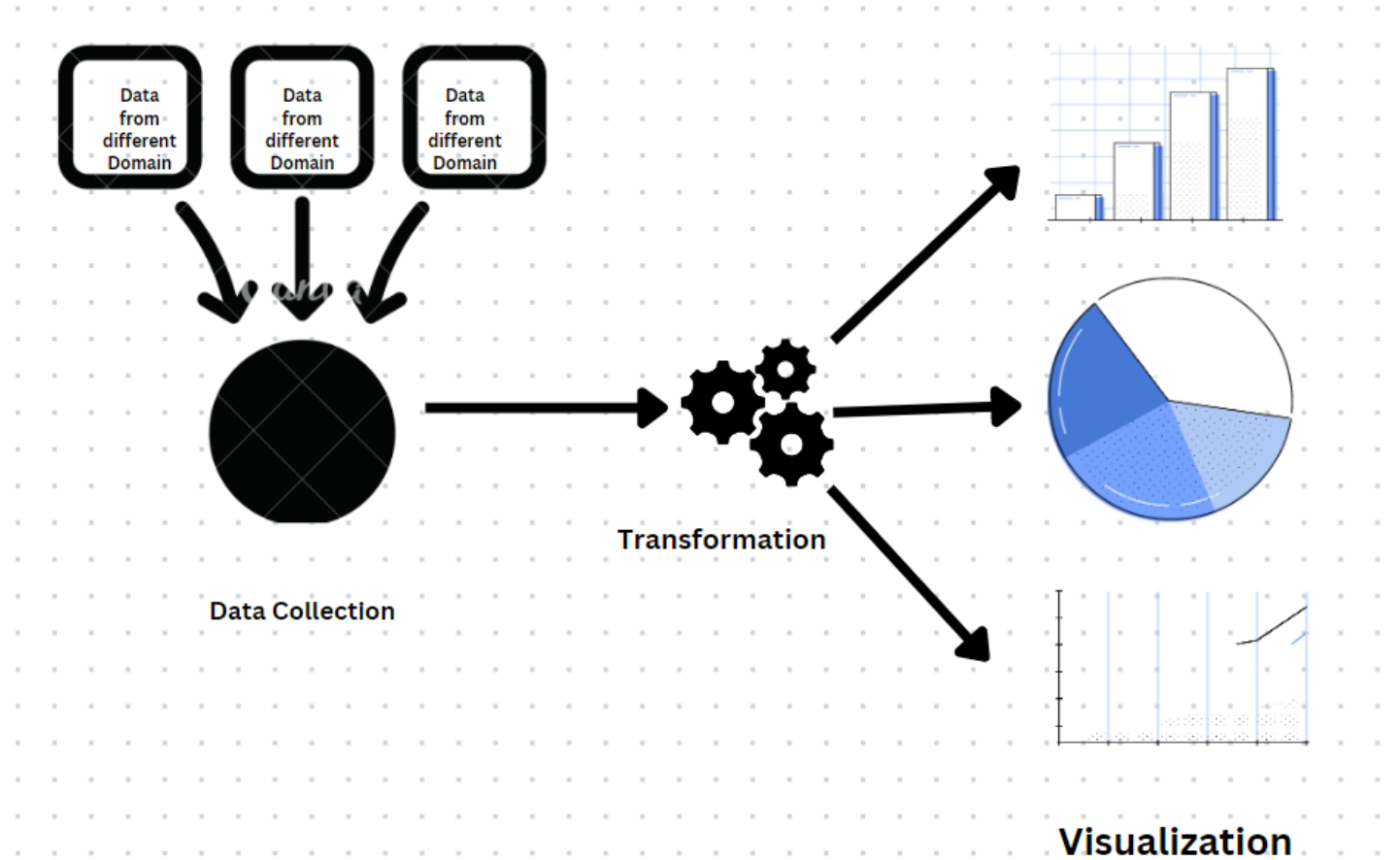
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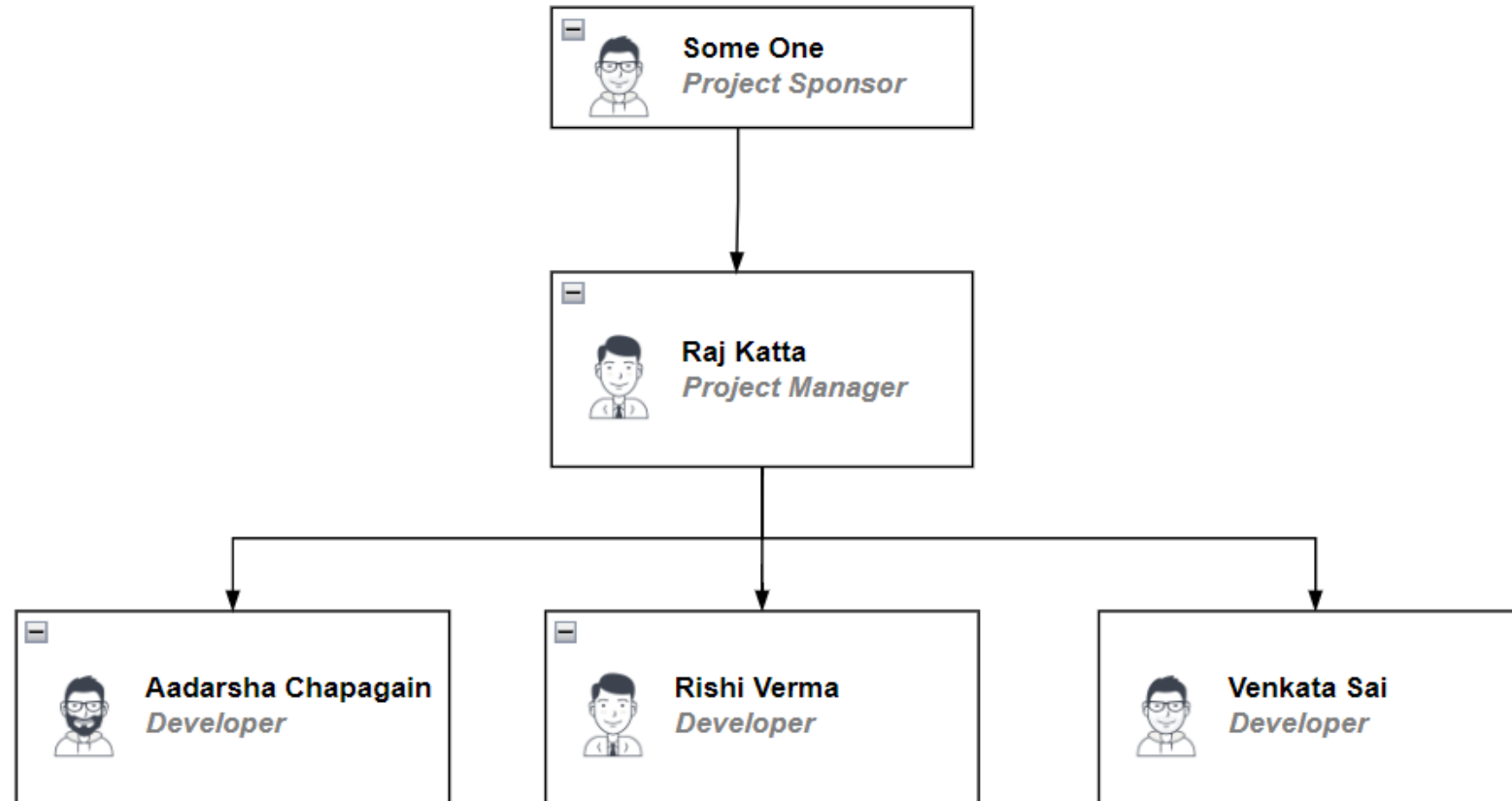
What is DataVerse



Project Title and description

- Financial institutions are struggling to get insights from their data
- Excel is not enough to handle huge amount of data
- Just Accumulating data won't add any value to organization
- Companies utilizing data as an information assets are ahead of the game
- **Dataverse** is a data visualization project where data from financial institutions will be collected, transformed and visualized

Project Team

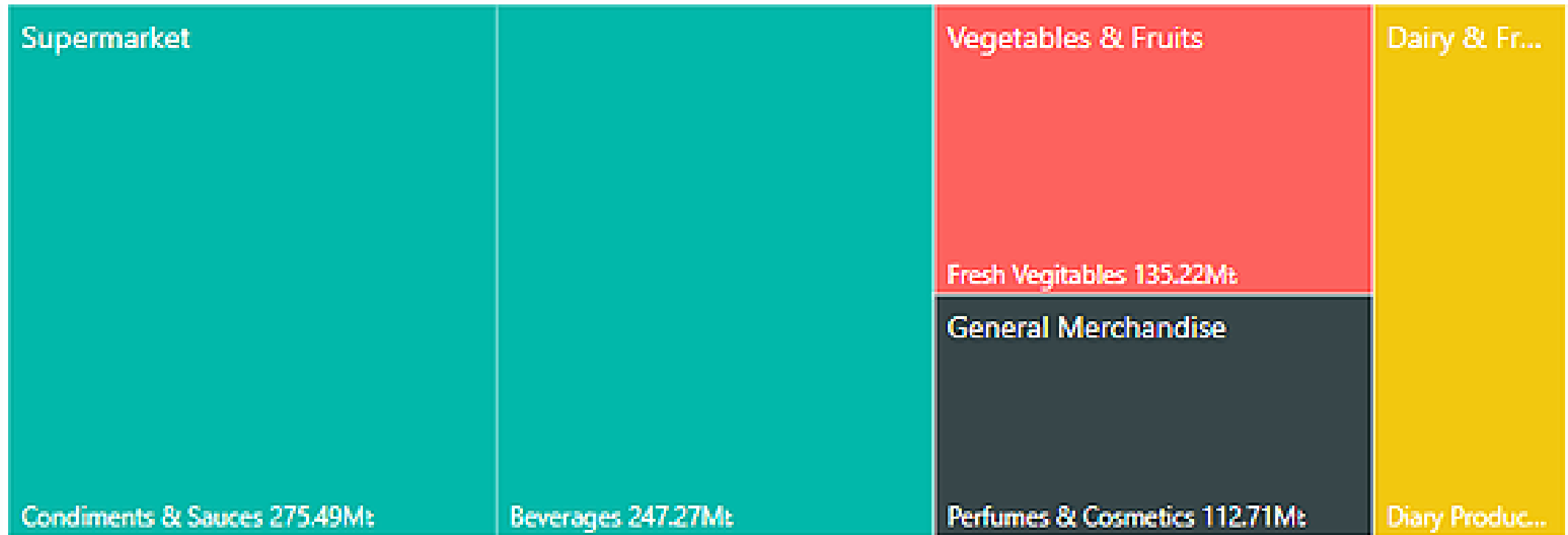


Business Case

- This project targets banking customers when and how they are likely to be most amenable to making a purchase.
- This provides information to help optimize banking marketing efforts. This knowledge can involve anything. Client may design a new product or service and know when and where to market them.
- Additionally, if a client experiencing a slowdown in sales, the data will provide insights into what is wrong.

Credit card spending Visualisation

Top 5 Purchase Areas



Technology & Resource

- This project leverages Microsoft Azure Public Cloud services as Pay-as-you-Go subscription to avoid capital investments and operational maintenance.
- Rajasekhar katta will be the Project Manager and Data modeler.
- Rishi Varma will be appointed as Data Engineer.
- Aadarsha Chapagain will be an Azure Devops developer.
- Venkata Sai Manikanta will be PowerBI developer.

Key Stakeholder List

- Customers
- Project Manager
- Project Team Members
- Company Executives
- Project Sponsor
- Steering Committee
 - An Advisory group providing guidance on key decision's on sponsor, executives and key stakeholders

Stakeholder Requirements as known

- Business unit: Enterprise Business Intelligence (EBI)
- Business Operations
- Customers
- Subject Matter Experts

Product Description

- This project aims to help the clients by reaching the banking customers and shows when they are most likely to be open to making a purchase.
- By creating the PowerBI dashboard with all the required data the client can access lot of information about their customers spending patterns in a simple way.
- This will provide the information about the customers purchase history, their spending limits and many more.

Key Deliverables

- Customers spending patterns
- Big purchases in last 6 months
- How many times they exceed the credit limit in past 2 years
- Repaying on time or not
- Their top 5 spending product categories
- All these insights will be presented on PowerBI Dashboard

References

- <https://learn.microsoft.com/en-us/power-bi/fundamentals/service-get-started>
- <https://learn.microsoft.com/en-us/power-bi/create-reports/service-dashboard-create>
- <https://truelayer.com/blog/data-chain-retrieving/>
- <https://docsumo.com/blog/best-bank-data-extraction-software>
- <https://www.inetco.com/use-cases/credit-and-debit-card-analytics/>