

# RBC Bank

## Project Flow Steps

1. Business requirement document (BRD)
  2. Functional requirement document (FRD) - This is optional
  3. Data Gathering
  4. Data cleaning / Data transformation
  5. Data modelling
  6. UI (power view reports)
  7. DAX Functions
  8. Enhance UI
  9. RLS
  10. create workspace and provide the workspace access
  11. publish the report to the workspace
  12. Dashboard/Mobile view (optional) - create as an app
  13. Gateway (one time step)
  14. Schedule a refresh
  15. Add roles to security
  16. Subscribe, manage alerts
  17. Share the report
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# Business Requirement Document

## Section: Data Dictionary

This section defines the meaning and relevance of various data fields used in the dataset related to customer behavior in a bank (likely for churn analysis).

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### Data Fields and Descriptions

- **RowNumber**  
Corresponds to the record (row) number and **has no effect on the output**.
- **CustomerId**  
Contains random values and **has no effect on customer leaving the bank**.
- **Surname**  
The surname of a customer **has no impact** on their decision to leave the bank.
- **CreditScore**  
Can have an **effect on customer churn**, as customers with **higher credit scores are less likely to leave the bank**.

#### Credit Score Ranges:

- **Excellent:** 800–850
- **Very Good:** 740–799
- **Good:** 670–739
- **Fair:** 580–669
- **Poor:** 300–579
- **Geography**  
A customer's **location can affect** their decision to leave the bank.
- **Gender**  
It's useful to explore **whether gender plays a role** in customer churn.
- **Age**  
Considered **relevant** because **older customers are less likely** to leave the bank than younger ones.

- **Tenure**—refers to the number of years that the customer has been a client of the bank.
  - Normally, older clients are more loyal and less likely to leave a bank.
  - Balance—also a very good indicator of customer churn, as people with a higher balance in their accounts are less likely to leave the bank compared to those with lower balances.
  - NumOfProducts—refers to the number of products that a customer has purchased through the bank.
  - HasCrCard—denotes whether or not a customer has a credit card. This column is also relevant, since people with a credit card are less likely to leave the bank.
    - 1 represents credit card holder
    - 0 represents non credit card holder
  - IsActiveMember—active customers are less likely to leave the bank.
    - 1 represents Active Member
    - 0 represents Inactive Member
  - EstimatedSalary—as with balance, people with lower salaries are more likely to leave the bank compared to those with higher salaries.
  - Exited—whether or not the customer left the bank.
    - 0 represents Retain
    - 1 represents Exit
  - Bank DOJ—date when the Customer associated/joined with the bank.

### **Data Gathering:**

Please use the following data assets to pull the data related to Bank customer and associated details.

- ActiveCustomer
- Bank Churn
- CreditCard
- CustomerInfo
- ExitCustomer
- Gender
- Geography

### **Churn Analysis:**

Analyze the data and bring out few insights on the customer Churn.

It is advantageous for banks to know what leads a client towards the decision to leave the company.

Churn prevention allows companies to develop loyalty programs and retention campaigns to keep as many customers as possible.