

Excel Data Cleaning and Formulas

Mini Lab: OurBank Practice Exercises





Solo Exercise:

OurBank Customer Churn

OurBank's consumer credit card business manager is concerned about their customer attrition. Customers keep moving to other banks and leaving OurBank in the dust. This is a big problem, because they know it costs a lot more money to get new customers than it does to retain existing customers.

They want to analyze the data to find out the reason behind this, predict future customers who might leave, and to determine whether or not there are strategies they can use to encourage existing customers to stay. They also want to know if they can improve the data they collect in any way.





Solo Exercise:

OurBank customer churn

1. Download the **OurBank_Customer_Churn.csv** file and import the data into Excel. Copy a Raw Data backup sheet, and rename the original sheet Clean Data. Create a Working Summary sheet to document your changes.
2. Add a column to the data determining whether a customer's credit limit is Low (less than \$10,000) or High (higher than or equal to \$10,000).
3. Calculate how many customers have Low credit limits and how many have High credit limits.



Solo Exercise:

OurBank Customer Churn

4. Add a column to the data determining whether a customer has a High, Average, Low or No Utilization as per the below:
 - a. If Avg_Utilization_Ratio is 0, “No Utilization”
 - b. If Avg_Utilization_Ratio is between 0 and 0.2, ”Low”
 - c. If Avg_Utilization_Ratio is between 0.2 and 0.4, “Average”
 - d. If Avg_Utilization_Ratio is over 0.4, “High”
5. Calculate how many customers have each category of Utilization including percentage.
6. Are there any other columns you might want to add to get a better sense of the data?