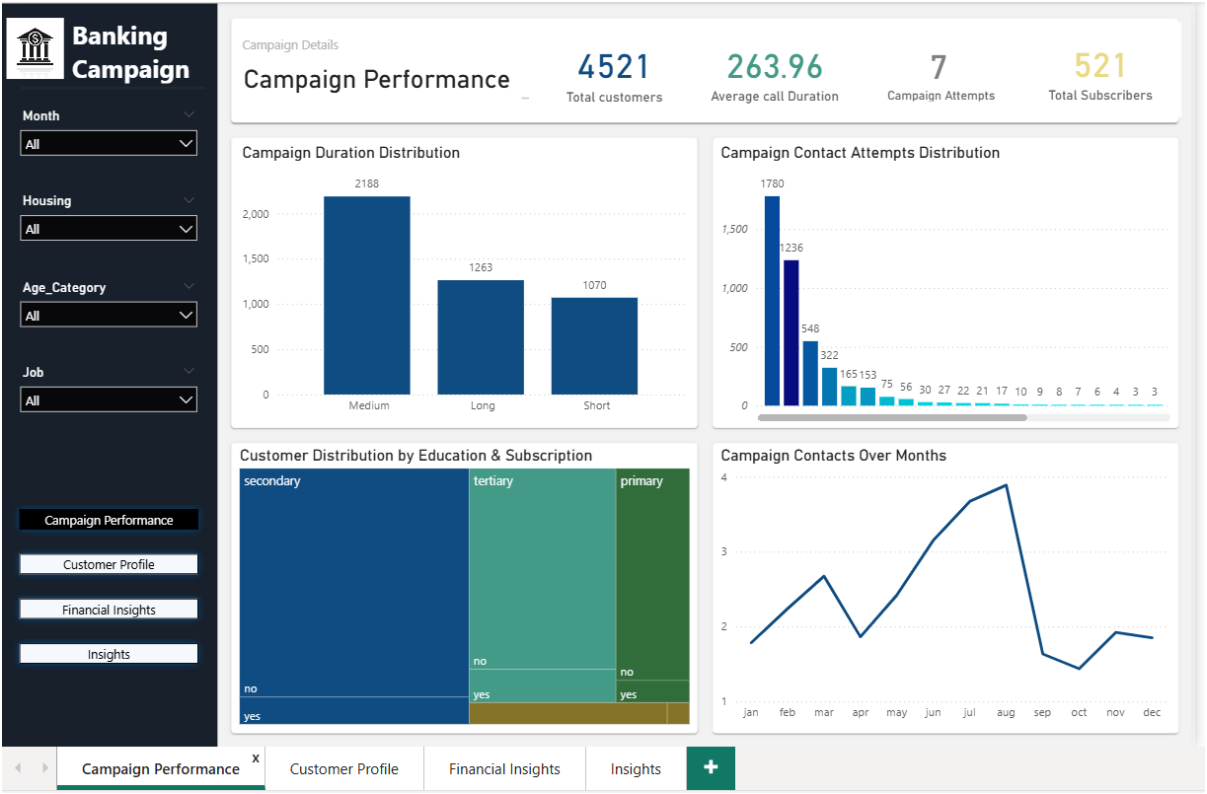


# Banking Campaign

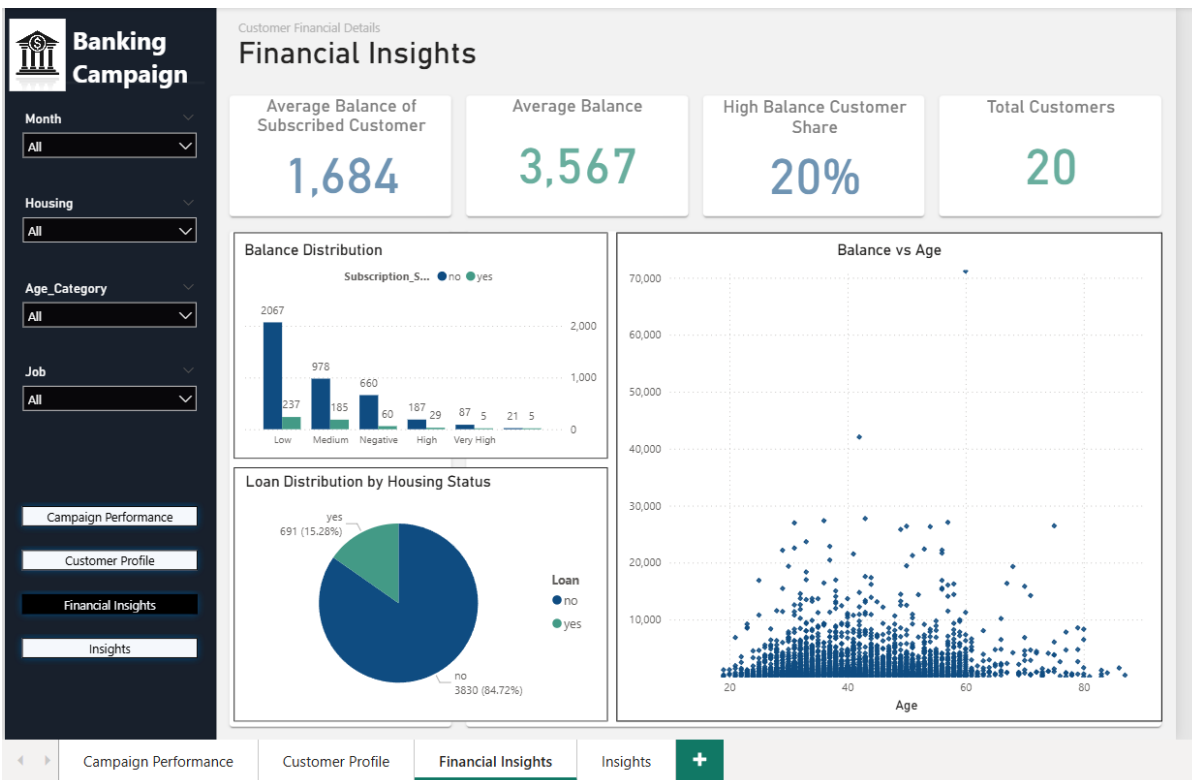
## Dashboards

### Page – 1 Campaign Performance

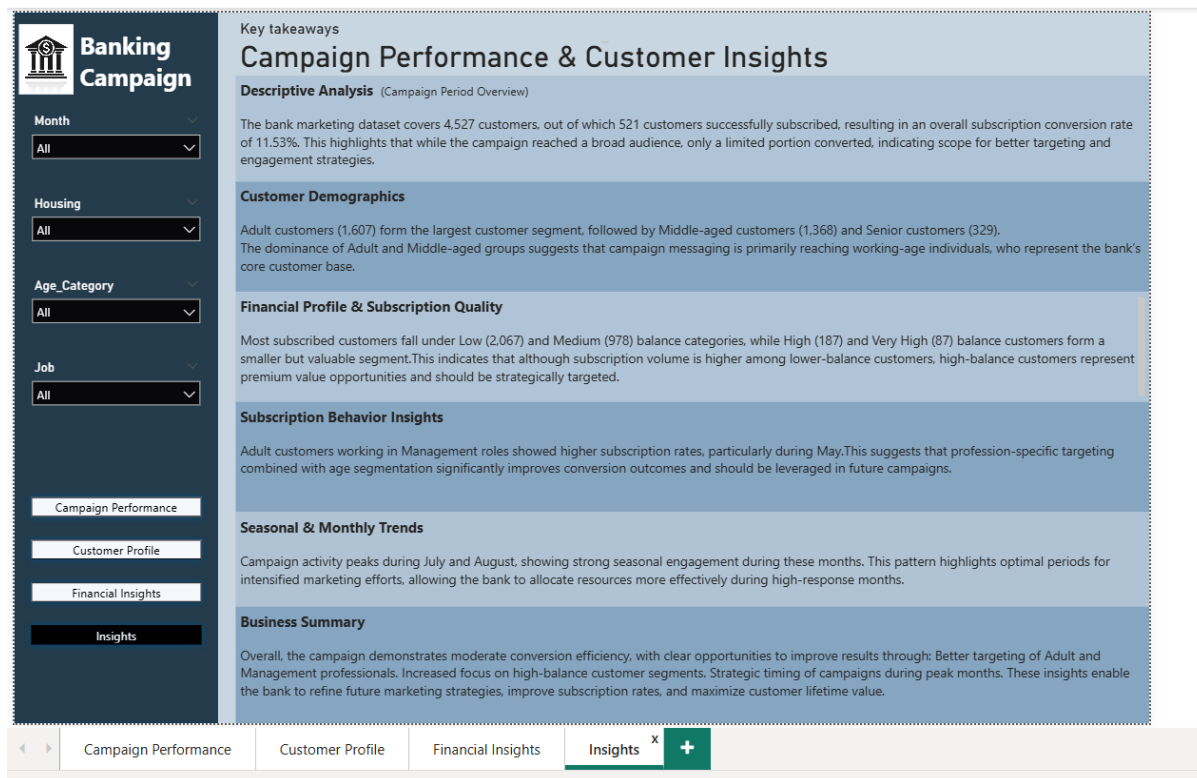




## Page – 3 Financial Insights



## Page –4 Insights



## Dashboard Overview

The Power BI dashboard consolidates all key visuals created during the analysis phase into a single, coherent view.

The dashboard includes visuals related to:

1. Customer demographics (Age, Education, Job)
2. Financial behaviour (Balance, Loans, Housing)
3. Campaign performance (Duration, Campaign attempts, Month-wise trends)
4. Subscription outcomes (Yes / No)

## Summary of Findings (Plain English)

This analysis looks at how customer characteristics, financial behavior, and marketing campaign activities influence whether a customer subscribes to a term deposit. By combining multiple visuals in the Power BI dashboard, we can clearly see which customer segments respond better to campaigns and where marketing efforts are most effective.

Out of the entire customer base, **521 customers subscribed** to the term deposit, resulting in a **subscription conversion rate of 11.52%**. While this percentage may seem low at first glance, it is typical for banking campaigns and highlights that subscriptions come from a specific group of customers rather than the entire population. This makes targeted marketing more important than mass outreach. Financial behavior also reveals interesting patterns. A large portion of subscriptions comes from customers with **low (2,067)** and **medium (978)** balances, while customers with **high or very high balances (274 combined)** subscribe less frequently. This suggests that subscription decisions are not driven only by wealth; even customers with lower balances are willing to invest when the product and communication are right.

Campaign timing and execution strongly influence outcomes. Customer engagement peaks during **July and August**, showing a clear seasonal trend. Additionally, certain job groups respond better—**management professionals within the adult age group**, especially during **May**, show higher subscription activity. This highlights the importance of aligning campaigns with both customer profile and timing.

Overall, the findings show that **who the customer is, when they are contacted, and how the campaign is executed** matter far more than simply increasing the number of contacts. The dashboard helps translate these patterns into actionable insights for more focused and effective banking marketing strategies.

## Key Insights

### Subscription Conversion is Low but Meaningful

- Total subscribed customers: **521**
- Conversion rate: **11.52%**

Insight: While the overall conversion rate is low, the absolute number of subscribers represents a valuable segment that can be further optimized.

### Adult and Middle-Aged Customers Dominate Subscriptions

- Adults: **1607**
- Middle-aged: **1368**
- Seniors: **329**

Insight: Most subscribers fall within **adult and middle-age groups**, making them the primary target demographic.

### Lower Balance Customers Subscribe More

- Low balance: **2067**
- Medium: **978**
- Negative: **660**
- High & Very High: **274 (combined)**

Insight: Subscriptions are not limited to high-balance customers. Even customers with lower balances respond well, suggesting trust-building campaigns work across income levels.

## Campaign Timing Matters

- Peak activity months: **July and August**

Insight: Seasonality plays a role in customer engagement. Campaigns launched during these months show better response.

## **Job Role Influences Subscription**

- Management professionals (Adults) subscribed more, especially in **May**

: Profession-based targeting can significantly improve campaign success.

## **Business Recommendations**

Based on the analysis, the following actions are recommended:

- Focus campaigns on Adult & Middle-aged customers  
These groups show the highest engagement and conversion.
- Optimize campaign timing  
Increase outreach during July and August, when customer responsiveness is higher.
- Improve campaign quality, not quantity  
Longer, meaningful conversations drive better subscriptions than repeated contacts.
- Do not ignore low-balance customers  
They form the majority of subscribers and represent future growth potential.
- Use job-based targeting  
Tailor offers for management and professional roles for higher effectiveness.

## **The dashboard tells a clear story:**

The success of a banking campaign depends less on how many customers are contacted and more on who is contacted, when they are contacted, and how meaningful the interaction is.

By combining demographic data, financial behavior, and campaign metrics, the dashboard enables decision-makers to:

- Identify high-potential customer segments
- Understand seasonal patterns
- Improve marketing efficiency
- Reduce wasted outreach efforts
- This transforms raw customer data into actionable business intelligence.