



Dr. D. Y. Patil Institute of technology, Pimpri, Pune

EFFECTIVE MARKETING USING GENAI

by Team Code Catalyst





INTRODUCTION



- Banks **struggle to identify** which **customers are most likely to buy additional products**.
- Traditional marketing campaigns are **generic**, **leading to low conversion** rates and **customer dissatisfaction**.
- Lack of personalized engagement **reduces customer loyalty** and cross-sell opportunities.





PROPOSED SOLUTION



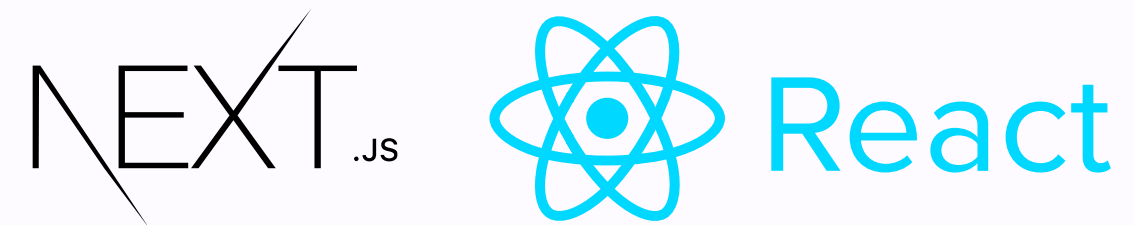
1. **Customer Segmentation** → Group customers using demographics, income, and spending habits.
2. **GenAI Recommendations** → Suggest the right banking products for each segment.
3. **Agentic Workflow:**
 - Planner & Reflector → Define and refine strategy.
 - Salesman & Action Agent → Create and deliver personalized messages.
 - Monitoring Agent → Track KPIs and optimize campaigns.





TECH STACK

FRONT-END



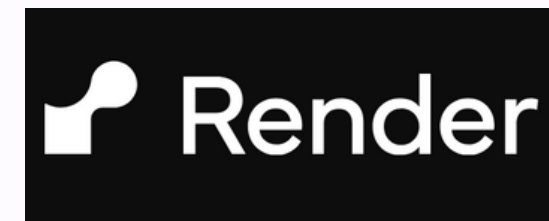
BACK-END



GEN AI



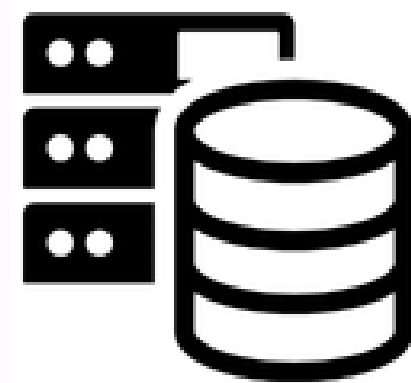
DEPLOYMENT



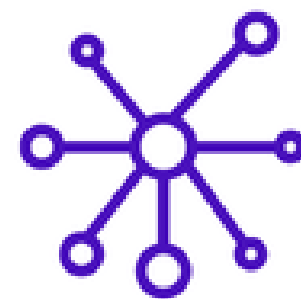


ARCHITECTURE

Grouping and Grading



Bank Customers
Dataset



Divide the Customer
in various cluster
according features



High Value
(Businessmen)

Intermediate Earners
(Service Workers, Unmarried)

Intermediate Earners
(Blue Collar Workers, Married)

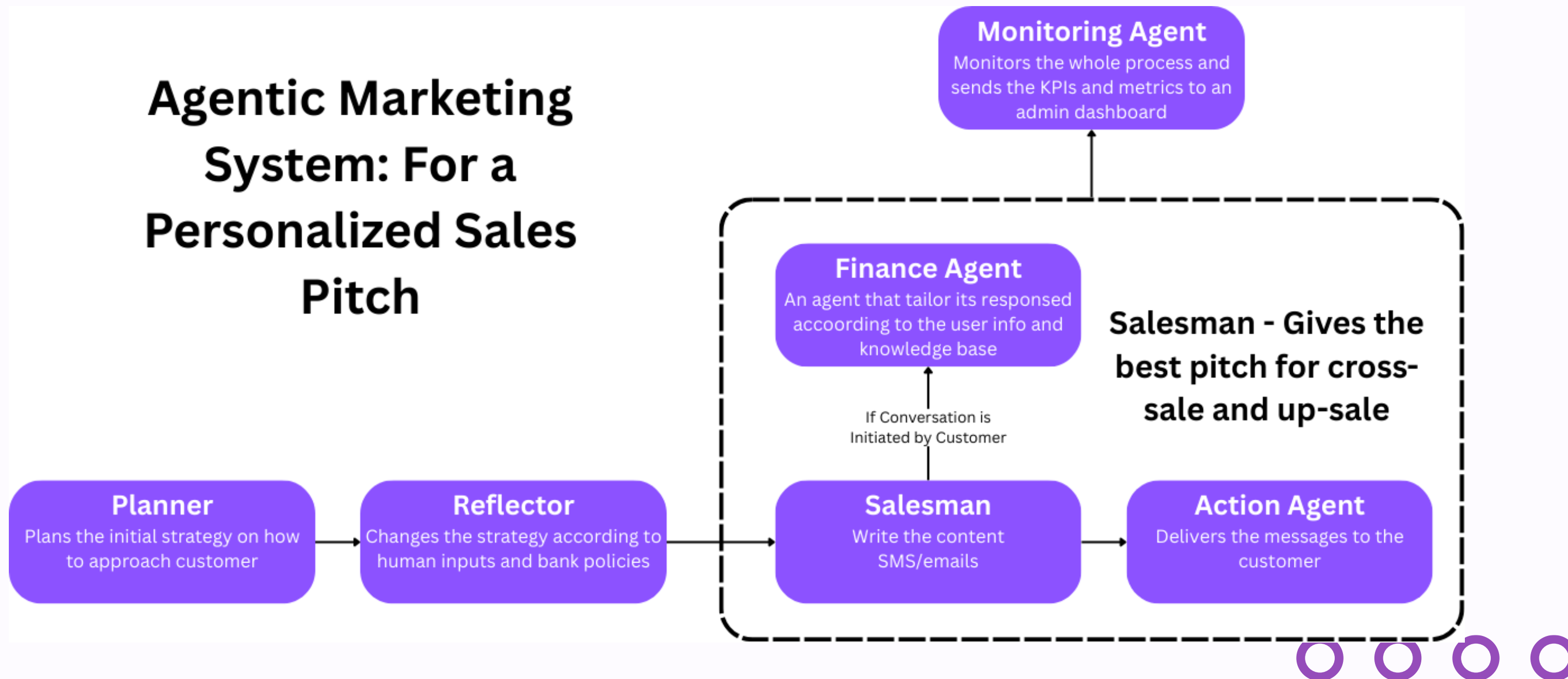
Low Earner
(Blue Collar Workers)





ARCHITECTURE

Agentic Marketing System: For a Personalized Sales Pitch





UI

Click to go back, hold to see history

← Back to Upload

Customer Segments

Select a customer segment to generate targeted marketing strategies

🎯 Select Your Target Segment

Choose one of the customer segments below to generate a personalized marketing plan, email campaigns, and push notifications tailored to that audience.

Young Professionals

👤 1,250

Tech-savvy millennials aged 25-35 with growing income

📈 Key Characteristics

- High digital engagement
- Mobile-first banking
- Investment interested

Select Segment

Established Families

👤 890

Middle-aged customers with families and stable income

📈 Key Characteristics

- Mortgage holders
- Education savings
- Insurance focused

Select Segment

Retirement Planners

👤 650

Pre-retirement customers focused on wealth preservation

📈 Key Characteristics

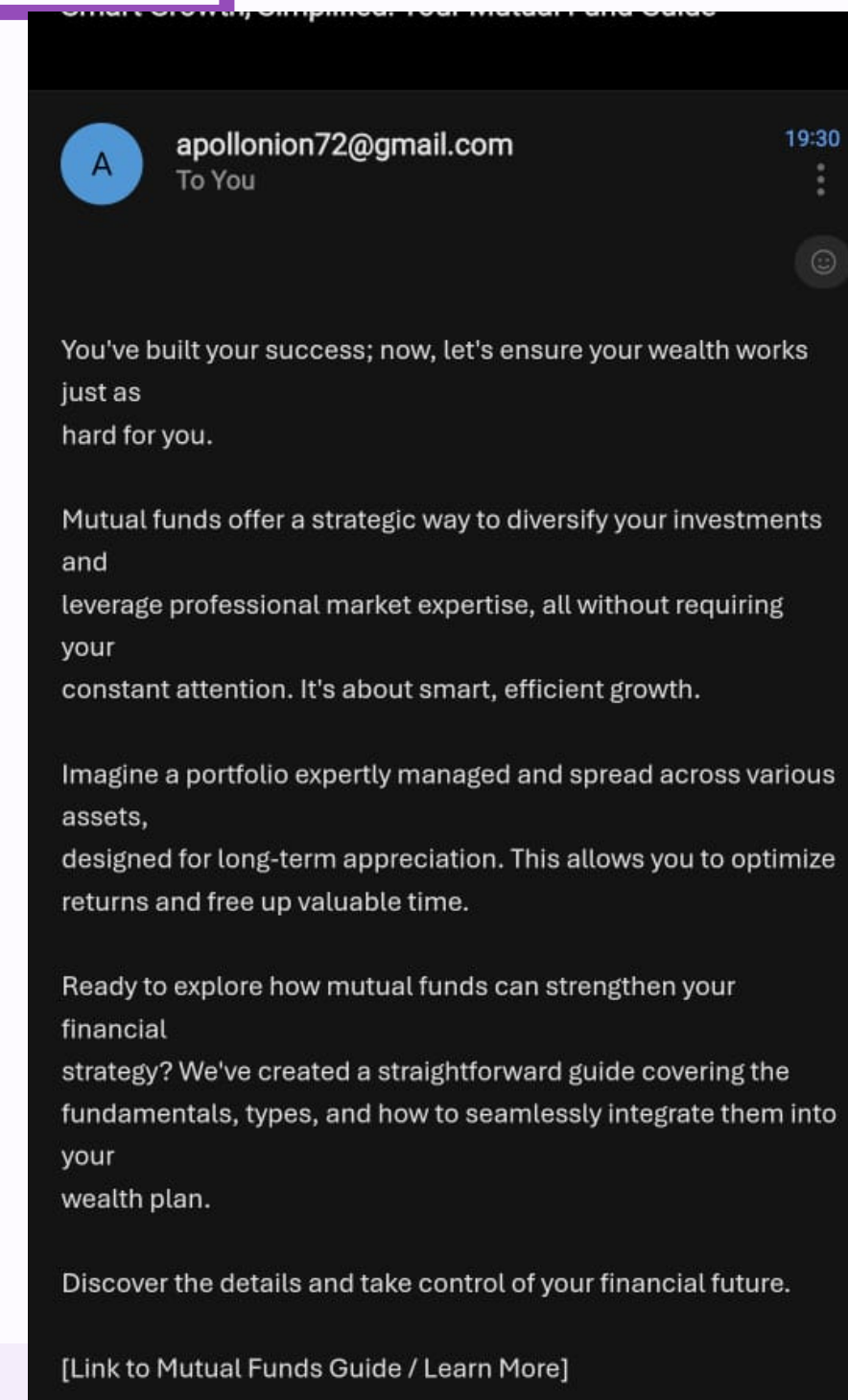
- Conservative investments
- Retirement planning
- High net worth

Select Segment





UI





VIDEO LINK

<https://drive.google.com/drive/folders/17Xk4y6TSc1EuTaATY2I5MQKeQfJRuEN3?usp=sharing>





THANK YOU

by Team Code Catalyst

