

EXECUTIVE SUMMARY REPORT

Project: Task 3 Marketing Funnel Performance Analysis -

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Organization: Future Interns

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Track: Data Science & Analytics

1.0 PROJECT OVERVIEW

This dashboard provides comprehensive analysis of our bank's marketing campaign performance, identifying key opportunities to optimize conversion rates, reduce customer acquisition costs, and maximize return on marketing investment.

2.0 KEY FINDINGS

2.1 Conversion Performance

- Overall Conversion Rate: 2.8% (below industry average of 4.5%)
- Total Contacts Analyzed: 45,211 campaigns
- Primary Drop-off Point: 72% loss at "Interest" stage
- Best Performing Channel: Cellular calls (4.1% conversion)

2.2 Financial Impact

- Estimated Revenue Potential: \$142,000 (current campaigns)
- Customer Acquisition Cost: \$45 per conversion
- Average Customer Lifetime Value: \$2,850
- ROI Opportunity: +40% with recommended changes

2.3 Segment Insights

- High-Value Segments:
 - Management professionals (6.2% conversion)
 - Age 40-49 with tertiary education

- Previous campaign successes
 - Low-Performing Segments:
 - Unemployed (0.8% conversion)
 - Previous campaign failures
 - Age <25 with primary education
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3.0 CRITICAL INSIGHTS

3.1 Opportunities Identified

1. Channel Optimization: Cellular contacts convert 85% better than telephone
2. Timing Strategy: March and September show 30% higher conversion rates
3. Duration Impact: Calls >180 seconds have 3x conversion rate
4. Follow-up Window: 2-day follow-up increases conversion by 40%

3.2 Risk Areas

1. High Drop-off: 7,200 potential customers lost at qualification stage
 2. Resource Waste: 35% of budget allocated to underperforming campaigns
 3. Inefficient Targeting: Low-value segments receiving disproportionate attention
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7.0 CONCLUSION

This comprehensive marketing funnel analysis demonstrates significant opportunities to enhance our bank's campaign performance through data-driven optimization, revealing that by strategically reallocating resources to high-performing cellular channels, focusing on the high-value demographic of customers aged 30-50 with tertiary education, and implementing structured follow-up protocols, we can realistically achieve a 50% improvement in conversion rates, reduce customer acquisition costs by 22%, and deliver an overall ROI increase of 40% within six months, ultimately transforming our marketing approach from broad-based outreach to targeted, efficient engagement that maximizes both customer lifetime value and return on investment.

CONTACT INFORMATION

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