

## **EXECUTIVE SUMMARY REPORT**

**Project:** Task 3 Marketing Funnel Performance Analysis -

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**Organization:** Future Interns

**Date:** 3 February 2026

**Track:** Data Science & Analytics

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## **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.

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## **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.

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## **CONTACT INFORMATION**

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