**QUESTIONS**: **1. High-Value Customers with Multiple Products**

**Scenario:** The business wants to identify customers who have both a savings and an investment plan (cross-selling opportunity).

**Task:** Write a query to find customers with at least one funded savings plan AND one funded investment plan, sorted by total deposits.

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Question 1: High-Value Customers with Multiple Products

Identifies customers with both savings (is\_regular\_savings=1)

and investment (is\_a\_fund=1) products

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SELECT

u.id AS owner\_id,

CONCAT(u.first\_name, ' ', u.last\_name) AS name,

-- Count distinct savings plans (where is\_regular\_savings = 1)

COUNT(DISTINCT CASE WHEN pp.is\_regular\_savings = 1 THEN pp.id END) AS savings\_count,

-- Count distinct investment plans (where is\_a\_fund = 1)

COUNT(DISTINCT CASE WHEN pp.is\_a\_fund = 1 THEN pp.id END) AS investment\_count,

-- Sum all confirmed deposits (converted from cents to dollars)

ROUND(SUM(ss.confirmed\_amount)/100, 2) AS total\_deposits

FROM

users\_customuser u

JOIN

plans\_plan pp ON u.id = pp.owner\_id

JOIN

savings\_savingsaccount ss ON pp.id = ss.plan\_id

WHERE

pp.is\_deleted = 0 -- Only non-deleted plans

AND pp.is\_archived = 0 -- Only non-archived plans

AND ss.transaction\_status = 'success' -- Only successful transactions

AND (pp.is\_regular\_savings = 1 OR pp.is\_a\_fund = 1) -- Only savings or investment plans

GROUP BY

u.id, u.first\_name, u.last\_name

HAVING

savings\_count > 0 -- Must have at least one savings account

AND investment\_count > 0 -- Must have at least one investment account

ORDER BY

total\_deposits DESC; -- Sort by total deposits in descending order