

Data Glacier

Week 7: Deliverables

Data Analyst: Cross Selling Recommendation Project

Team Member Details

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Problem Description

XYZ Credit Union in Latin America excels in selling individual banking products (e.g., credit cards, deposit accounts, retirement accounts). However, their customers rarely purchase multiple products, indicating low cross-selling performance. This project aims to analyze customer data and recommend actionable strategies to improve cross-selling for their products.

Business Understanding

Objective

- Increase product adoption among existing customers by analyzing customer data and identifying actionable insights.

Goals

1. Identify customer segments likely to purchase additional products.
2. Create non-ML strategies to encourage cross-selling.

Project Lifecycle and Deadline

Phases

1. **Business Understanding**
Understanding XYZ Credit Union's goals, current challenges, and expectations.
2. **Data Understanding**
Analyzing the structure, completeness, and consistency of provided data.

3. **Data Cleansing and Transformation**

Handling missing values, outliers, and transform data for analysis.

4. **Exploratory Data Analysis (EDA)**

Investigating customer demographics, income levels, product preferences, and segments.

5. **EDA Recommendation (PPT)**

Compiling findings into a presentation with actionable insights.

6. **Visualization**

Visualizing customer demographics, income, product adoption, and other KPIs.

7. **Final Presentation**

Presenting findings and recommendations to stakeholders.

Deadline: December 30th, 2024