



CMPT 889

EFFECTIVENESS OF ONBOARDING PHONE CALLS

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Content

01

Problem Definition

02

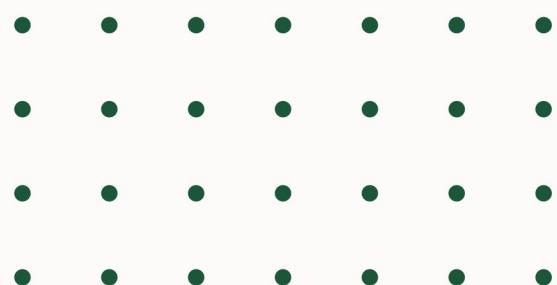
Overview & Strategy

03

Insights & Recommendations

04

Conclusion



Questions

Are phone campaigns effective – do these calls make customers more valuable?

Is there any customers that are not showing any difference if they are called or not?

Should we change anything to make the campaigns more cost effective?



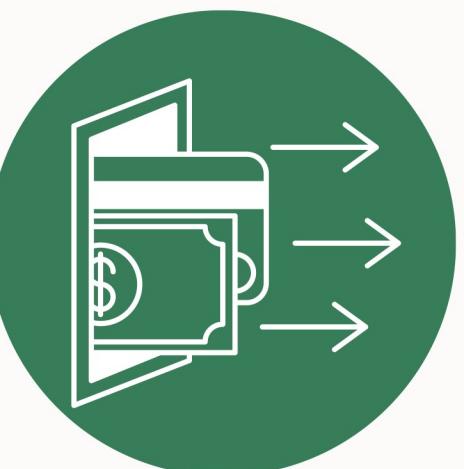
Calls



Other Factors



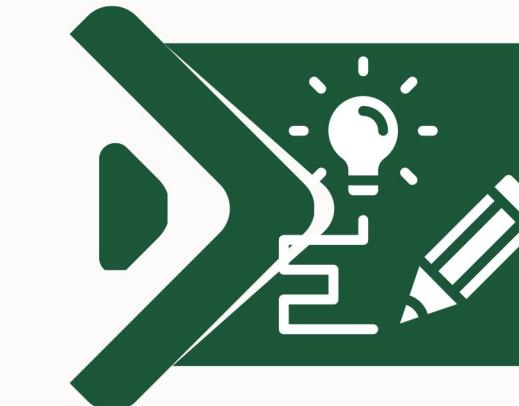
FUA



Transaction

Overview

01



Data Preprocessing

EDA



02

03



Analysis

Insights



04



STRATEGY

Four Groups

- Never Reached
- Reached Only at 3-Week Mark
- Reached Only at 3-Month Mark
- Reached Both

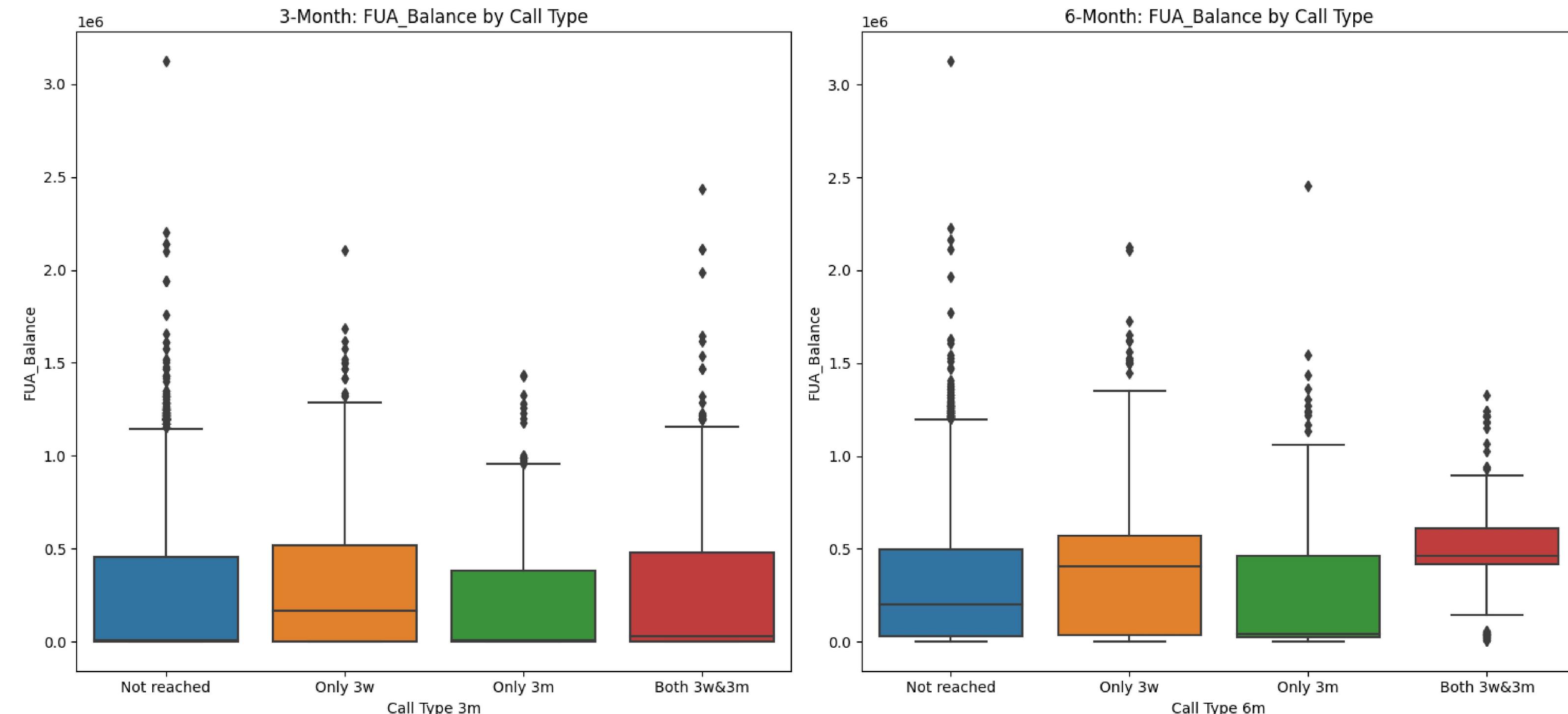
Segmentations

- Age Group
- City
- Income Group

Cost & Benefit

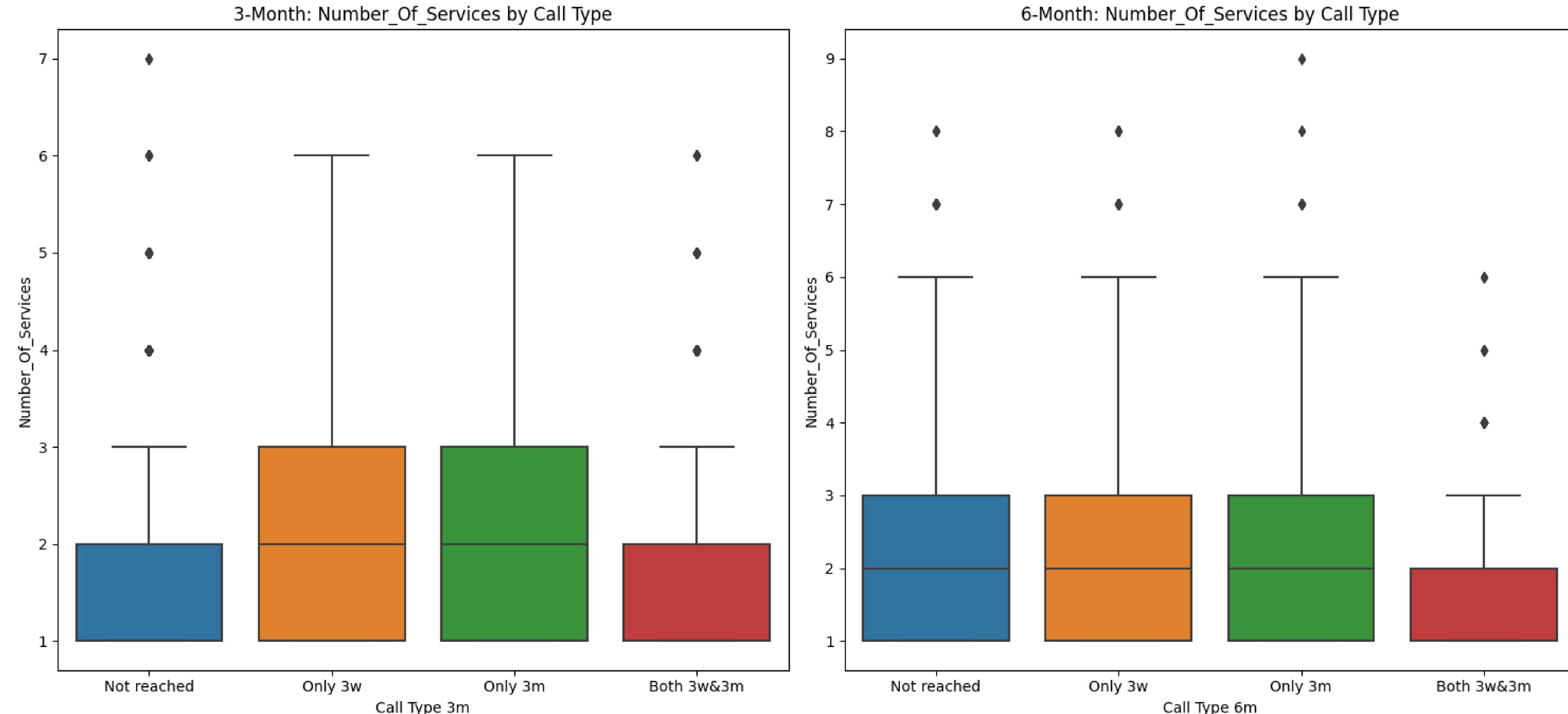
Avg Increase in FUA_Balance - Avg Cost
-> Net Benefit

Effectiveness of the call campaign - FUA



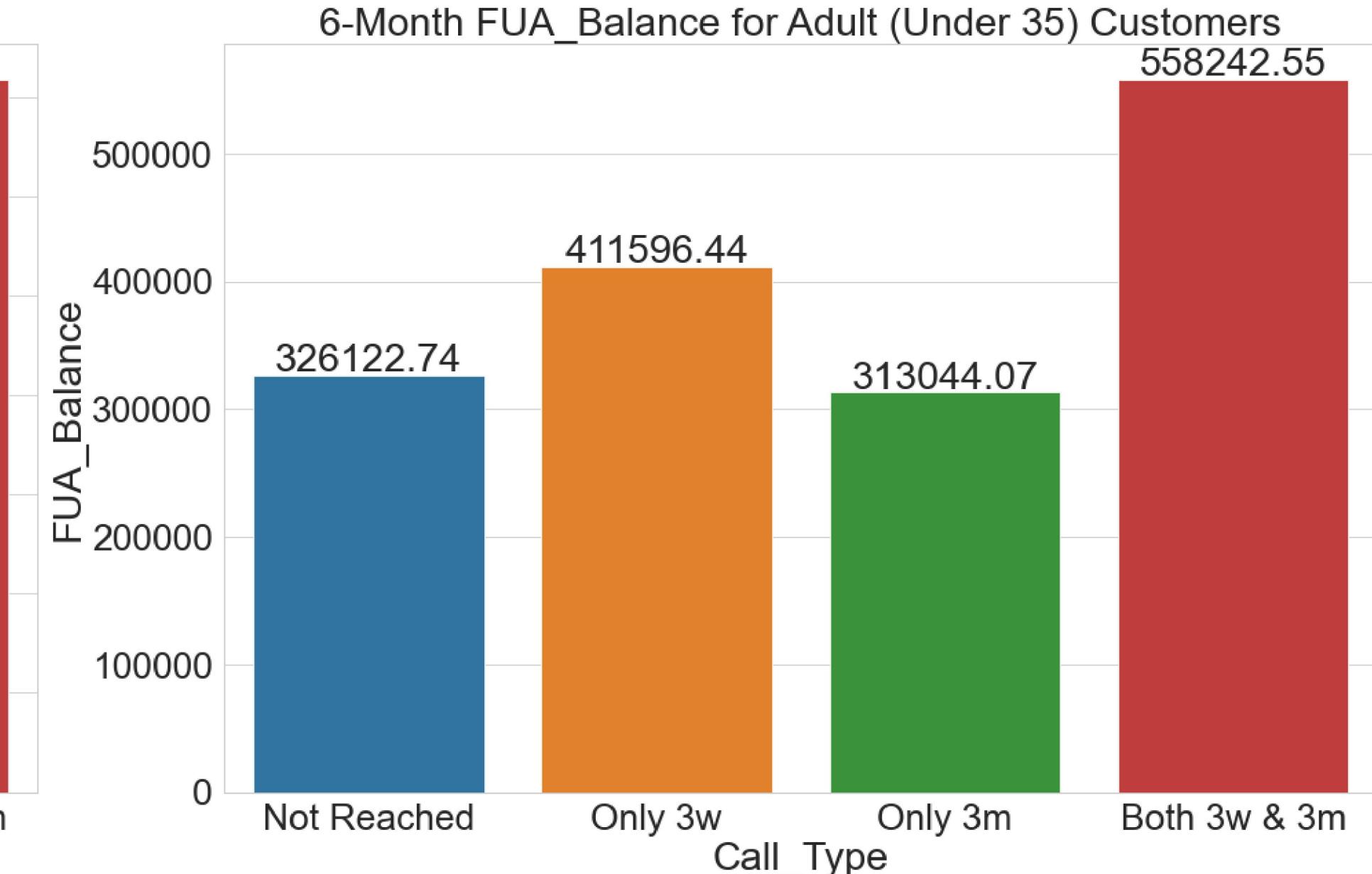
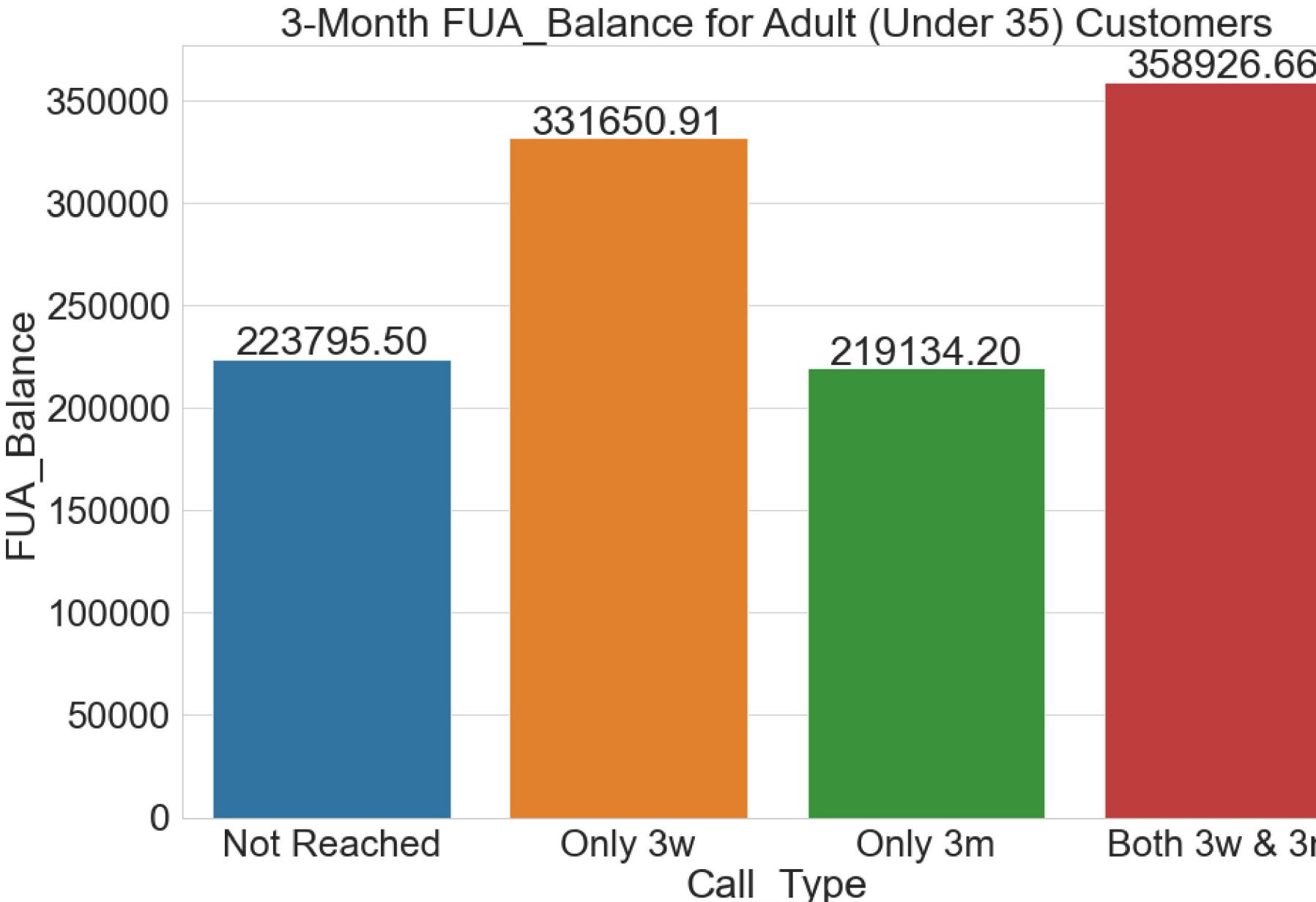
- Customers who received calls at both the 3-week and 3-month marks have a higher FUA balance, making them more valuable.

Effectiveness of the call campaign - Services



- Early interaction, like the 3-week call, seems to encourage a wider use of services by the clients.
- FUA_Balance and Number_Of_Services both show higher medians for called groups compared to No_Call group

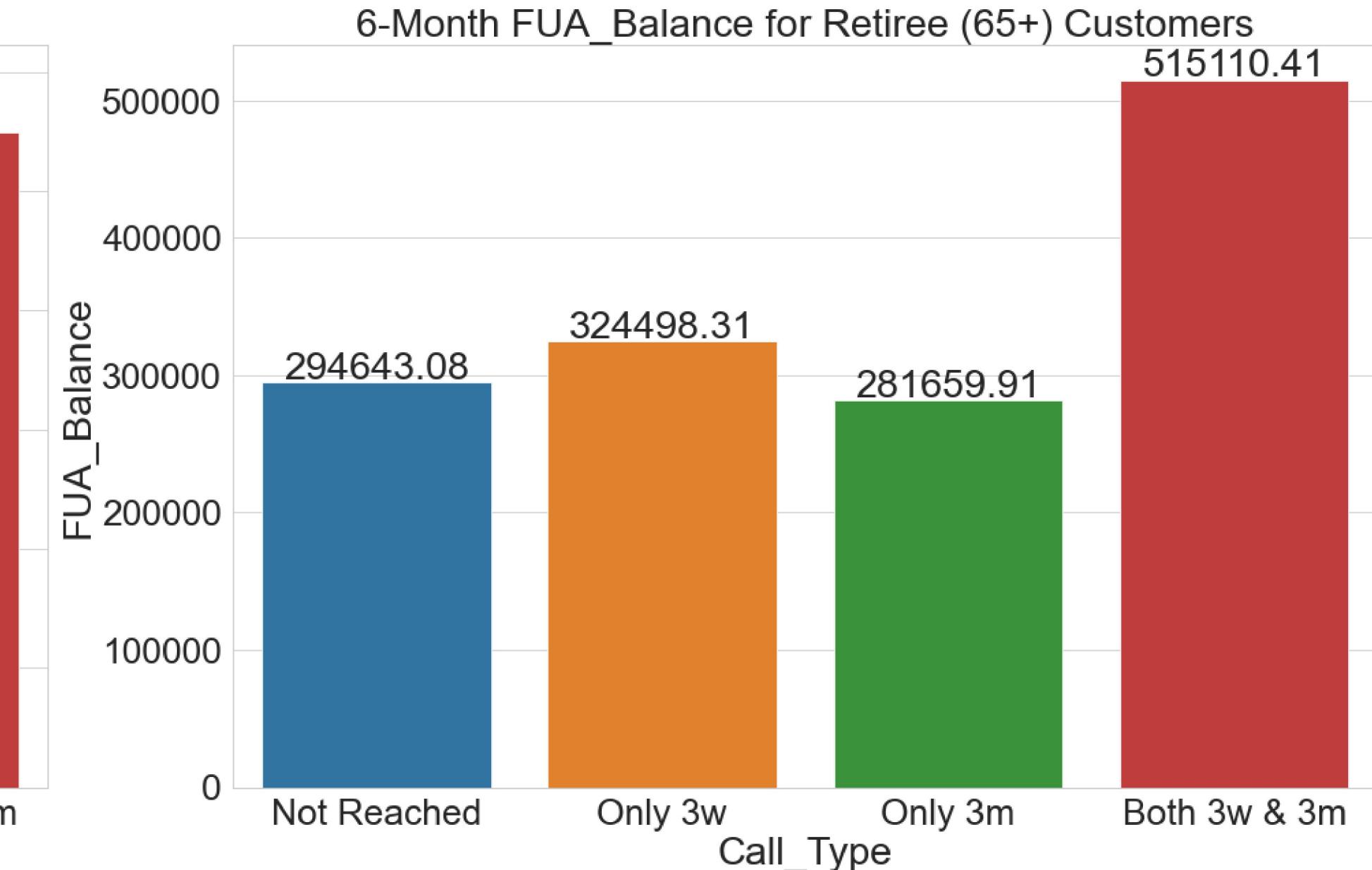
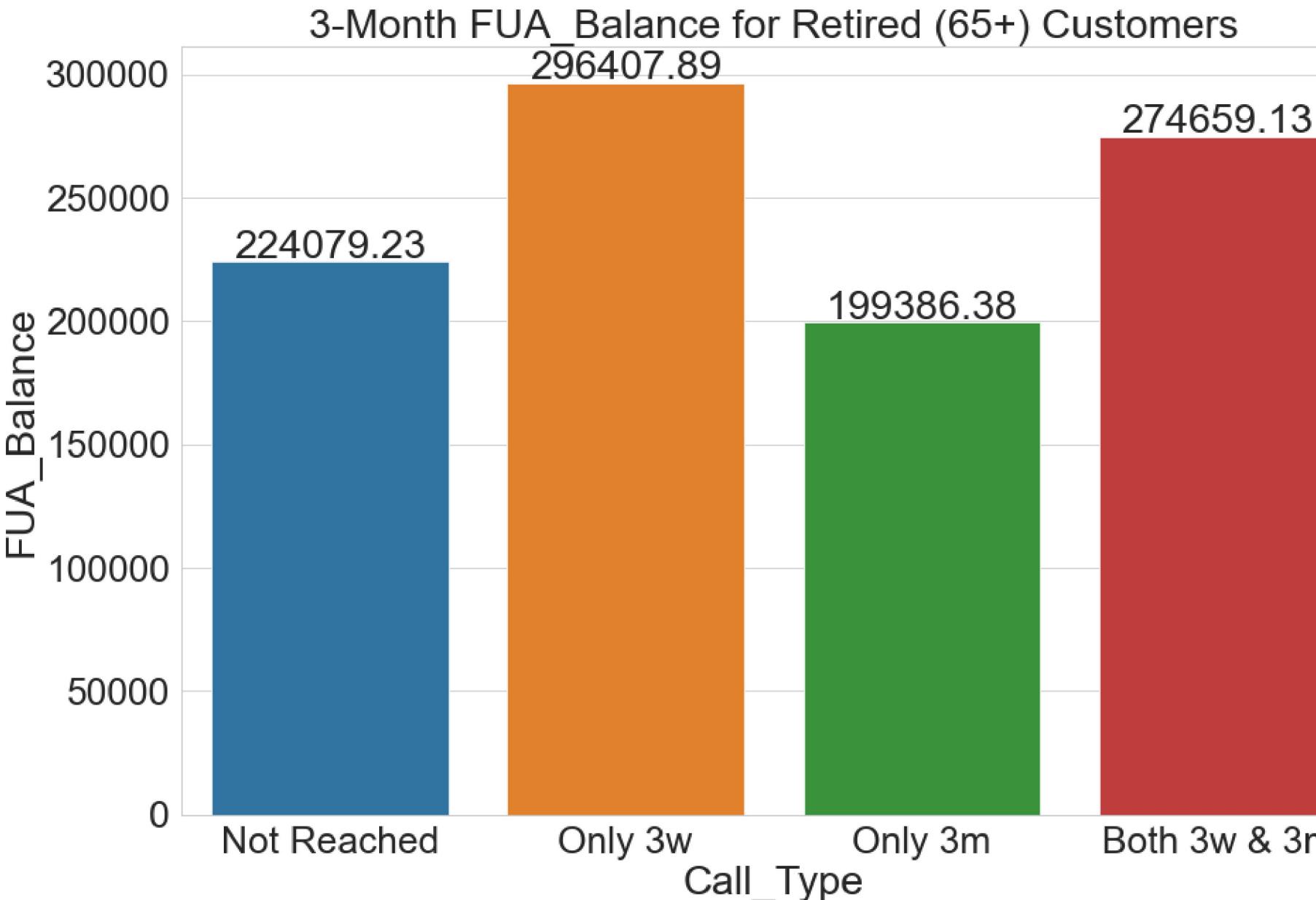
Segmentation - Age



Customers who are under 35 and were only reached at the 3-month mark:

- No obvious difference either short-term or long-term in terms of FUA_Balance

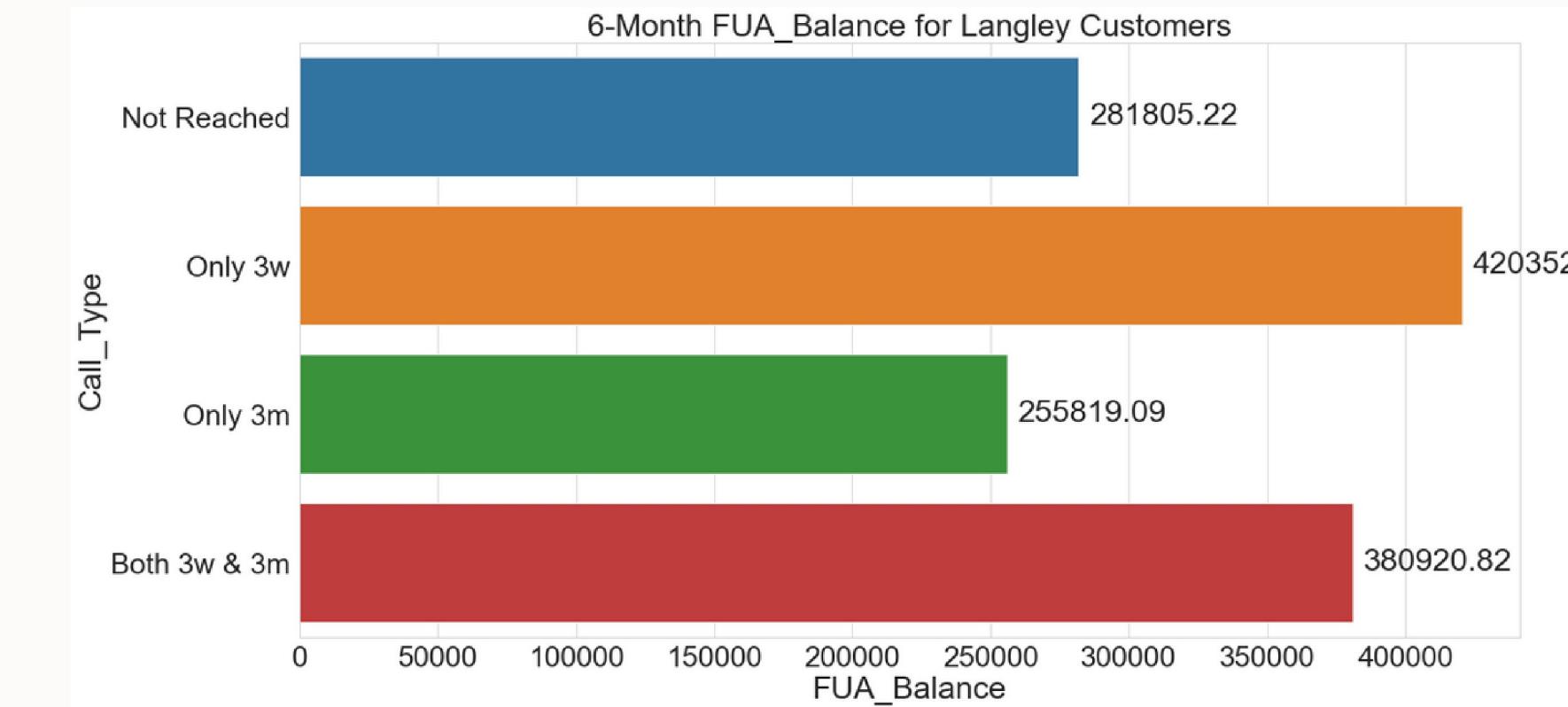
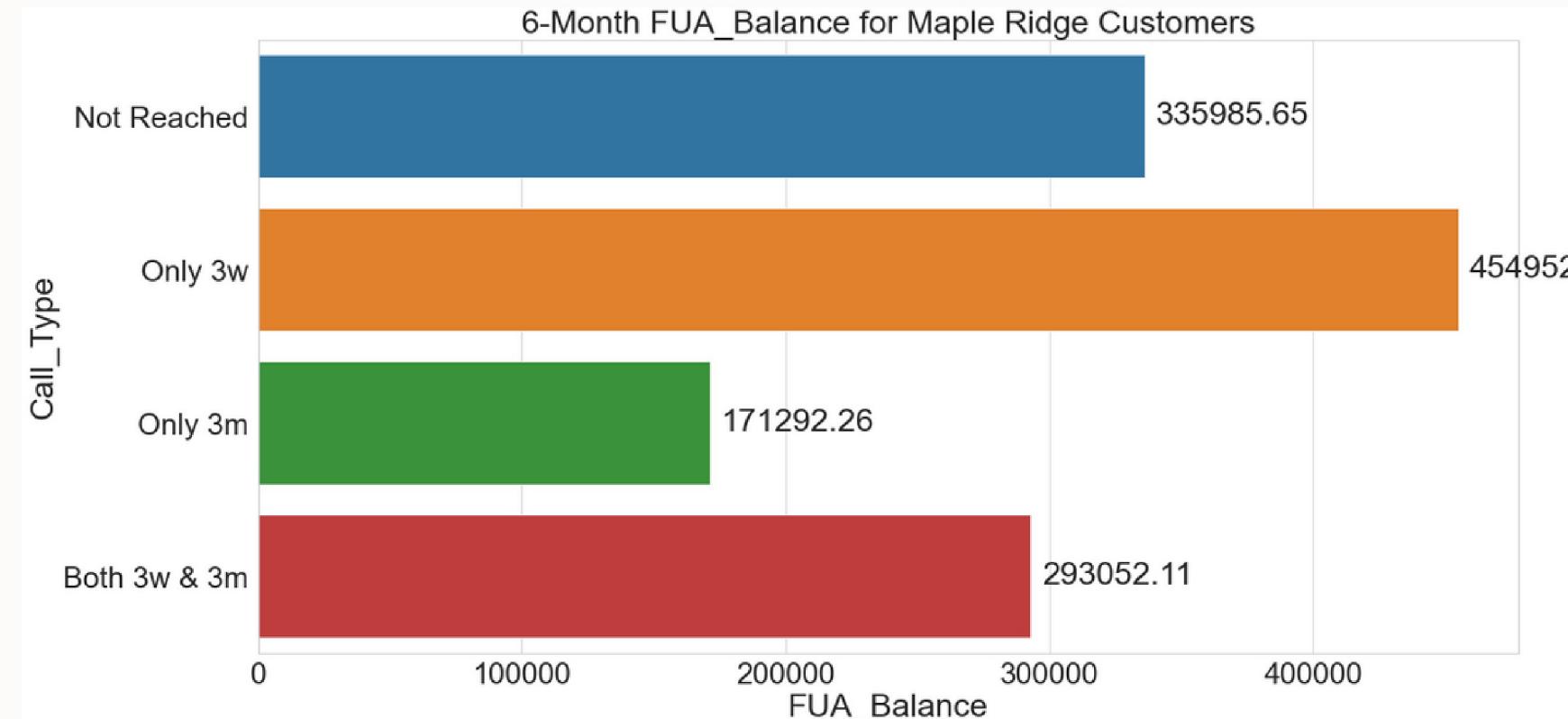
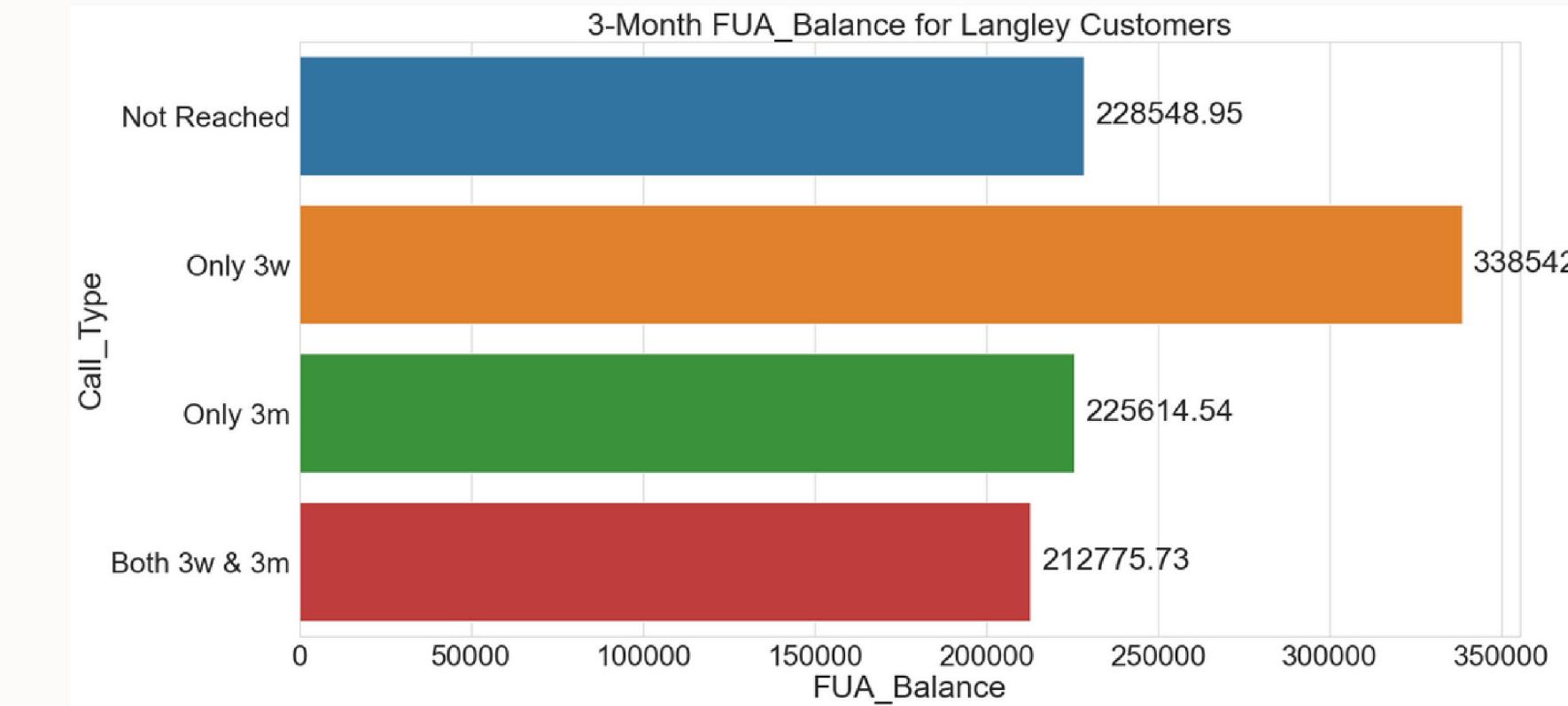
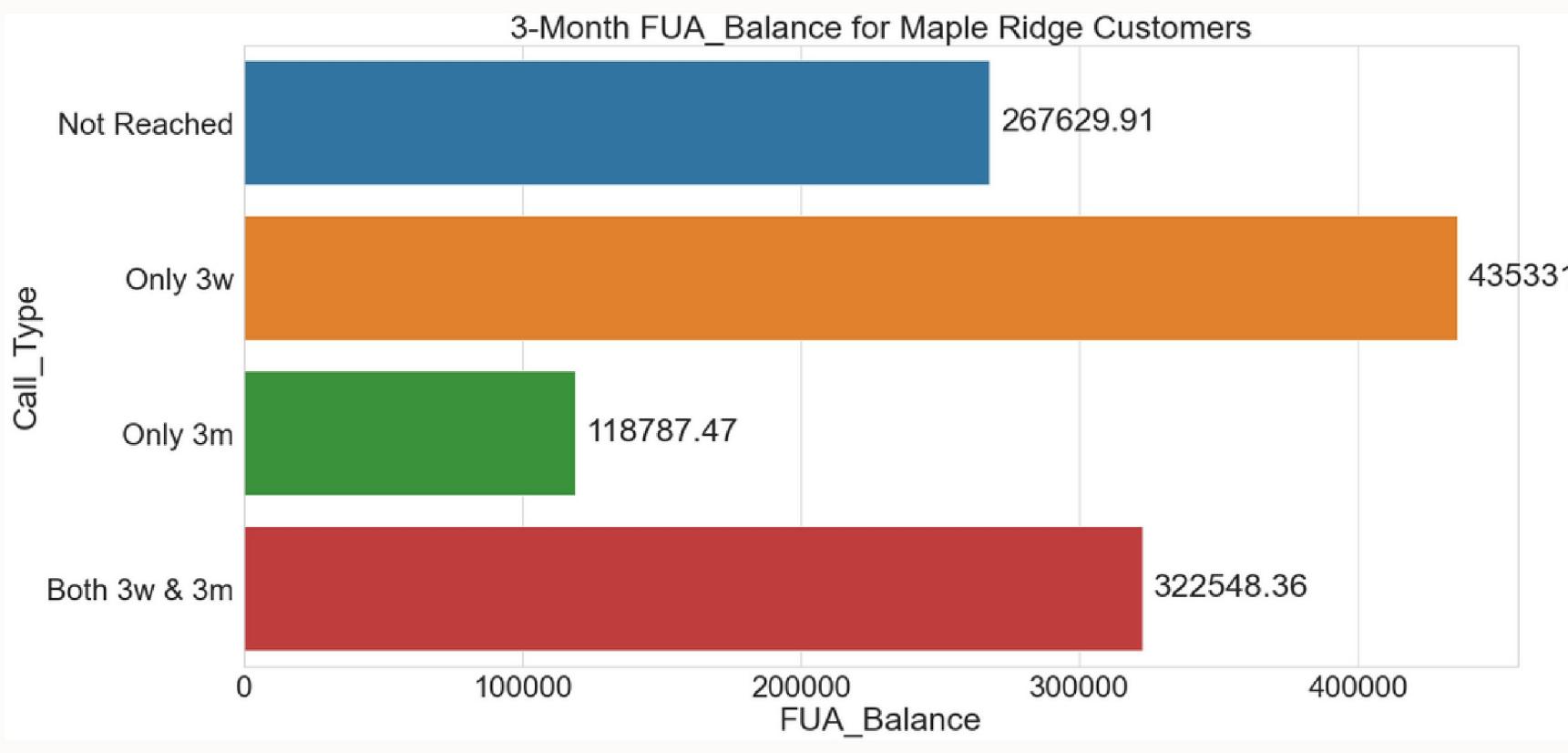
Segmentation - Age



Customers who are above 65 and were only reached at the 3-month mark:

- short-term: lower average FUA_Balance, difference within 11%
- long-term: No obvious difference

Segmentation - City



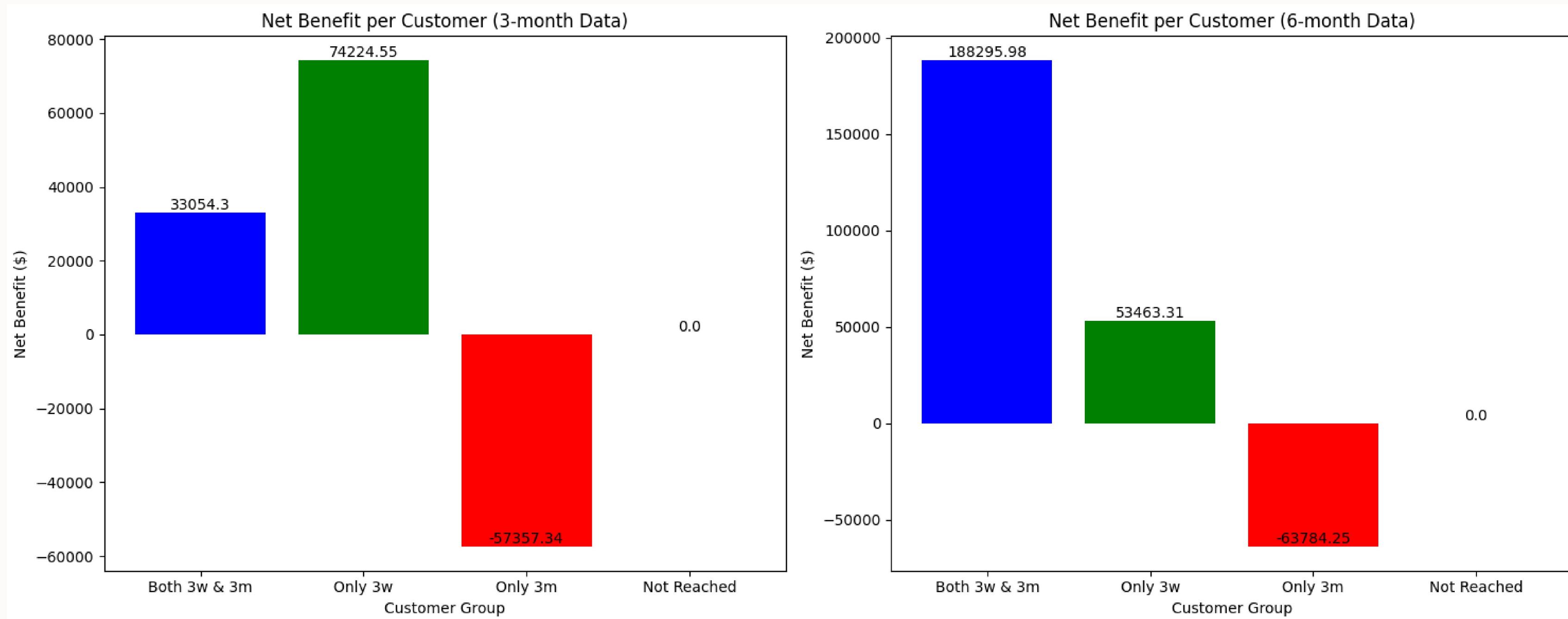
Maple Ridge

Langley

Recommended to only call at 3w mark

Cost-Benefit Analysis

Net Benefit = average increase in FUA_Balance minus the average cost of the calls.



- Not profitable to only call at 3m mark
- Recommended to call at 3m mark only if the customer picked call/was reachable at the 3w mark



CONCLUSION

- The onboarding calls are making the customers more valuable
- Customers under 35 or above 65 and were only reached at the 3-month mark show no difference no matter they are called or not
- We recommend calling the customer at 3-month mark only if the customer picked up/was reachable for the 3-week mark call
- We recommend calling customers in Maple Ridge and Langley only at the 3-week mark, which brings better results than calling them at both 3-week and 3-month marks



THANK YOU



Appendix

Inderjeet Singh

Cost-Benefit analysis & Data Cleaning

Jialiang

Segmentation analysis (reached or not, age, income, city)

Jieyuan Bi

Customer FUA analysis

Wenbin (Freya)

Data Exploration & Customer value analysis (Services, FUA)