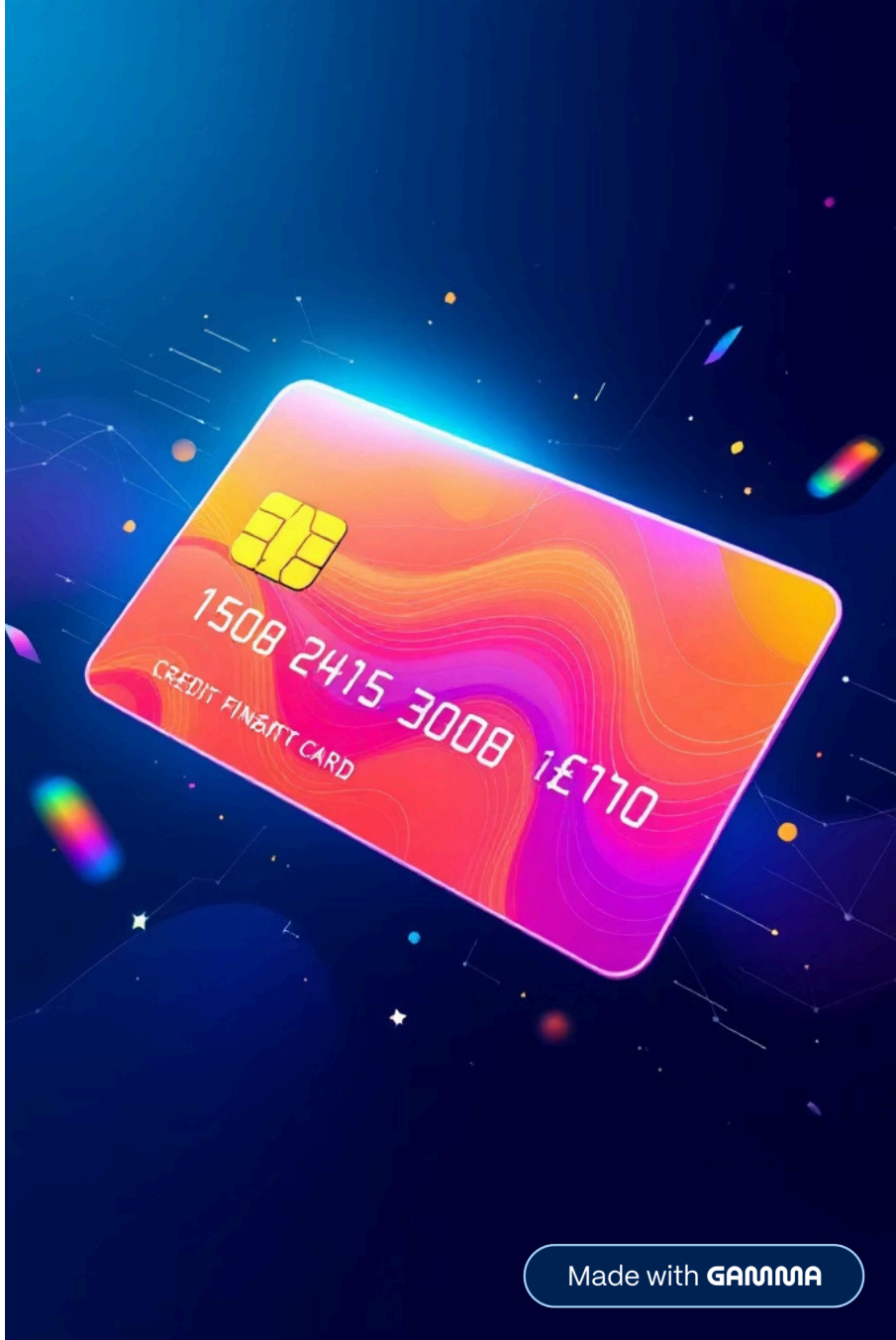
Credit Card Weekly Status Report

Comprehensive dashboard providing real-time insights into key performance metrics and trends for credit card operations.



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PROJECT OVERVIEW

Project Objective

Develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations effectively.

01

Import data to SQL

Prepare CSV files and create database tables

02

Process & analyze

Apply DAX queries for insights

03

Build dashboard

Create interactive visualizations

04

Share insights

Export and distribute findings

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DATA PIPELINE

SQL Database Integration

Streamlined data import process ensures accurate and efficient transfer of credit card transaction data into the SQL database for analysis.

CSV Preparation

Format and validate source data files

Table Creation

Design database schema and relationships

Data Import

Execute import with 10,108 records in 82ms

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Data Processing & DAX Queries

Age Group Segmentation

Categorize customers into age brackets: 20-30, 30-40, 40-50, 50-60, and 60+ for targeted analysis.

Income Classification

Segment customers by income levels: Low (under $35K), Med ($35K-$70K), and High (over $70K).

Week Number Calculation

Calculate week numbers from start dates to enable week-over-week trend analysis.

Revenue Computation

Total revenue calculated from annual fees, transaction amounts, and interest earned.

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WEEK 53 ANALYSIS

Week-over-Week Performance

28.8%	57M	8M	46M
Revenue Growth	**Total Revenue YTD**	**Interest Earned**	**Transaction Amount**
Significant increase in weekly revenue	Overall revenue performance	Total interest income generated	Total transaction volume

Key Highlights

Week 53 (31st December) shows strong momentum with revenue increasing by 28.8%. Transaction amounts and customer counts also increased, indicating healthy growth across all metrics.

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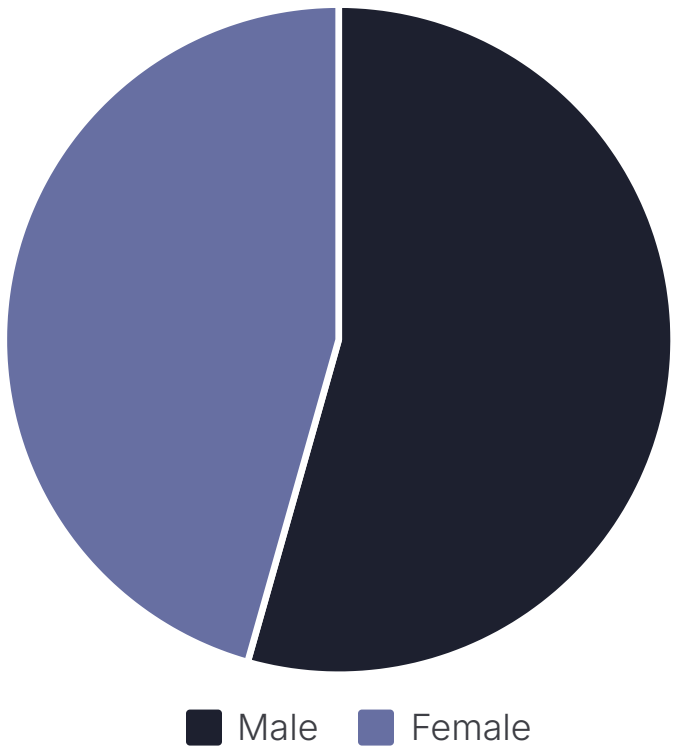
Customer Demographics & Card Performance



Revenue by Gender

Male customers contribute $31M in revenue compared to $26M from female customers, representing 54% and 46% of total revenue respectively.

Card Type Distribution

Blue and Silver credit cards dominate the market, contributing to 93% of overall transactions, indicating strong preference for these card tiers.

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Geographic & Performance Metrics

Top States: TX, NY, CA

These three states contribute 68% of total revenue, representing the core geographic markets.

Activation Rate: 57.5%

Overall card activation rate indicates strong customer engagement and onboarding success.

Delinquent Rate: 6.06%

Low delinquency rate demonstrates healthy credit portfolio and effective risk management.

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DASHBOARD SOLUTION

Interactive Power BI Dashboard

1 Real-Time Insights

Developed interactive dashboard using transaction and customer data from SQL database to provide real-time insights.

2 Streamlined Analysis

Streamlined data processing and analysis to monitor key performance metrics and trends effectively.

3 Actionable Intelligence

Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.

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Key Takeaways

Strong Growth Trajectory

28.8% week-over-week revenue increase demonstrates robust business momentum and market expansion.

Geographic Concentration

Focus on TX, NY, and CA markets yielding 68% of revenue presents opportunities for strategic expansion.

Healthy Portfolio Metrics

57.5% activation rate and 6.06% delinquency rate indicate strong customer quality and risk management.

Product Performance

Blue and Silver cards driving 93% of transactions validates current product strategy and customer preferences.

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Next Steps

Monitor Trends

Continue tracking weekly performance metrics

Optimize Strategy

Leverage insights to refine marketing and operations

Stakeholder Updates

Distribute findings to drive informed decisions

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