

# Dollars & Sense

Automating and optimizing banking marketing strategies with machine learning



# Agenda and Intro

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01

The Bottom Line

02

Data Overview

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Modeling and Stats

04

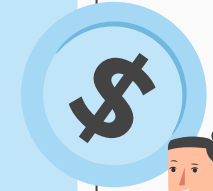
App Workflow and Demo

05

Next Steps / Wrap Up

# The Bottom Line

Reduce the risk of missed business by  
automatically calculating the likelihood of  
customer acquisition from a list of leads



# Data Overview

## Dataset Overview

45,307

Customer Interactions

2008 - 2011

Campaign Timeline

## Dataset Features



### Customer

- Age
- Job
- Education



### Campaign

- Last contact
- Previous success
- Contact details



### Economic

- EURIBOR Rate
- CPI Rate
- Employment Rate

Data Overview

Modeling

App Demo

Next Steps

# Modeling and Insights

*Recall / Accuracy Performance*

73%

## Insights

**Relationships are everything**

Previous customers are more likely to subscribe to new offerings

**Economic performance matters**

Customers are highly educated and likely know best times to purchase

**Stay with those leads**

Less time between calls means increased acquisitions

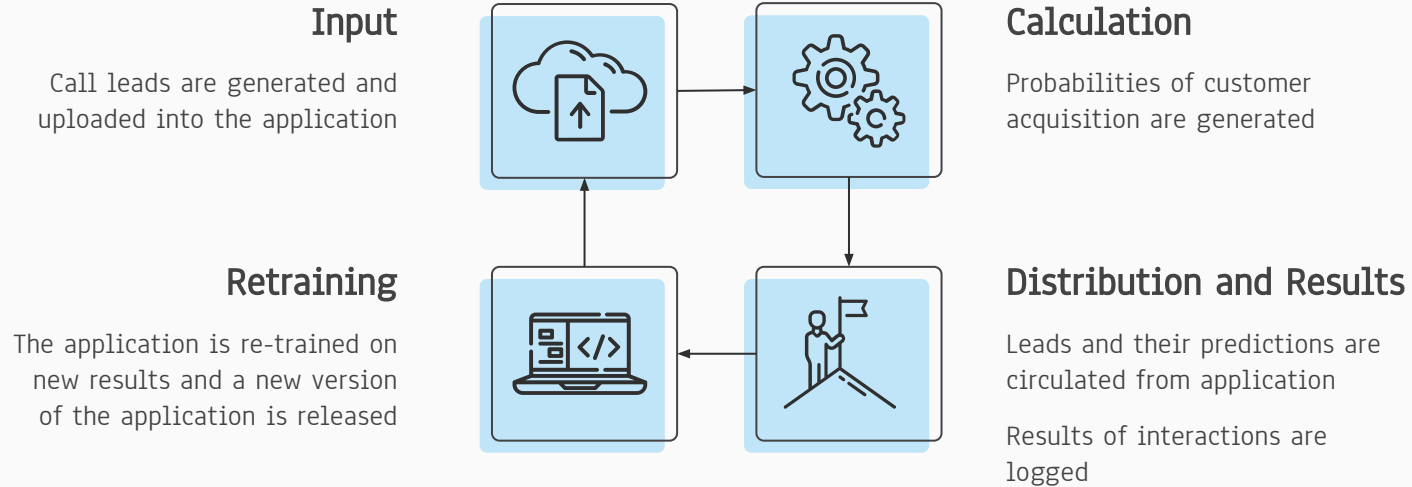
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# App Use and Demo



# Next Steps



## Product Integration

Including product information would likely increase performance



## App Expansion

App functionality can be expanded for manual inputs and visualizations



## Automatic Retrain

App can automatically retrain itself on new data

### Projected Timing:

*TBD - Depends on availability*

*May 2023*

*June 2023*

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# THANKS

Does anyone have any questions?



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