

BANK MARKETING: RULE-BASED LEAD SCORING DELIVERY

41,188 Clients Scored & Prioritized for Conversion

December 2025

Welcome!

Thank you for trusting me with your campaign data. This project delivers a transparent, logic-driven scoring engine designed to optimize your sales outreach and maximize term deposit subscriptions.

What is inside this package:

- **01_Final_Scored_Leads.csv**: The full database of 41,188 clients, each assigned a numerical lead_score and a lead_tier.
- **02_Top200_Hot_Warm_Leads.xlsx**: Your immediate "Action List." These are the 200 highest-priority clients identified by the engine. **Please open this first.**
- **03_Interactive_Dashboard**: A visual exploration tool to filter leads by demographics and engagement metrics.
- **04_Scoring_Logic_One_Pager.pdf**: A detailed breakdown of the exact weights and rules used to calculate scores.
- **05_Quick_Start_Guide.pdf**: A roadmap for your sales managers to ensure maximum ROI from this data.

Key Strategic Insights

Based on the rule-based analysis of your 41,188 clients, we have identified three critical conversion drivers:

1. **Previous Success:** Clients with a poutcome = success show an **85–95% conversion probability**.
2. **The Engagement Metric:** Call duration is the #1 predictor; interactions exceeding 10 minutes are prioritized as "Hot."
3. **Liability Filtering:** Active housing loan holders convert **60% less often**, allowing you to de-prioritize this segment to save operational costs.

Next Steps & Implementation

I recommend we schedule a **15-minute strategy call** to:

1. **Review the Top 50 Leads:** Audit the highest-scoring Platinum leads together.
2. **Dialer Integration:** Build your priority call list for the sales team.
3. **Maintenance:** Discuss monthly campaign updates and logic refinement (optional retainer).

I look forward to helping you close more term deposits, faster.

Best regards,

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