

## Quick Start Guide: Implementing Lead Scoring

**Project:** Bank Term Deposit Optimization | **Database Size:** 41,188 Clients

### 1. Accessing the Priority Lists

- **Immediate Action:** Open 02\_Top200\_Hot\_Warm\_Leads.xlsx from the **04\_Data\_Deliverables** folder.
- **The Master List:** Use 01\_Bank\_41k\_Scored\_RuleBased.csv for larger team distributions or CRM bulk uploads.

### 2. Sales Team Workflow

To achieve maximum conversion, follow this priority sequence:

1. **High-Intensity Outreach (Hot Tier):** Start with leads scored **100+**. These clients have the highest historical probability of subscribing (85%+).
2. **Nurture Campaign (Warm Tier):** Focus on leads scored **50-99**. These require more time to explain the product benefits.
3. **Automation (Cold Tier):** Do not assign these to phone agents. Route them to automated SMS or Email marketing to preserve your team's energy.

### 3. Strategic Talking Points (Based on the Logic)

Equip your agents with these insights before they call:

- **Previous Success:** "We are following up on our successful previous interaction..."
- **Engagement Strategy:** The model shows that **Duration** is the #1 driver. Encourage agents to ask open-ended questions to keep the client on the phone longer than 5 minutes.
- **Liquidity Check:** Target clients without housing loans, as they typically have more disposable income for term deposits.

### 4. Expected Performance (ROI)

By using this ranked approach instead of random dialing, you should observe:

- **3x Increase** in successful subscriptions per hour of talk time.
- **60% Reduction** in wasted calls to low-propensity segments (like those with heavy housing debt).
- **Higher Agent Morale** due to significantly higher "Yes" rates on the Hot tier.

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### Next Steps & Support

- **Want a Live Demo?** I can generate a real-time explanation for any specific Lead ID in 5 seconds.
- **Need an Update?** I offer monthly retainer options to re-score your database as new campaign data arrives.

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