



BANK PHONE CALL CAMPAIGN

Case Study 2 | Group 6

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PROBLEM STATEMENT



- Analyzing the data for the phone call onboarding campaign.
- Understanding the effectiveness of the campaign
- Changing in customer involvement post the calls
- Making campaigns more cost effective



Customer history data For 3 month and 6 month



Calls made at 3 week and 3 month mark



\$12 per call



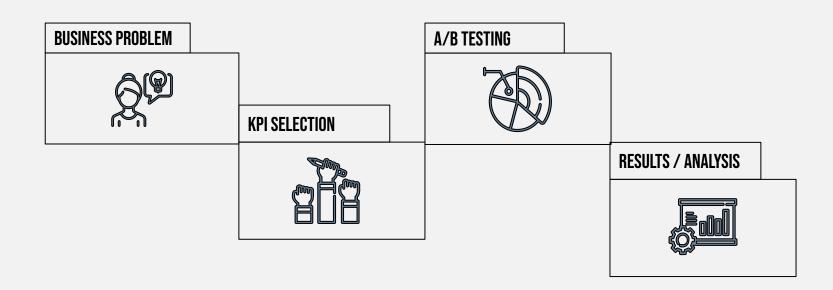








METHODOLOGY









KPI SELECTION

FUA_BALANCE

HAS_INVESTMENT

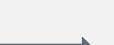
NUMBER_OF_SERVICES

HAS_PAYROLL

HAS_MORTGAGE

NUMBER_TRANSACTIONS

HAS_VISA









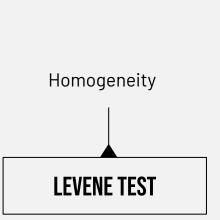


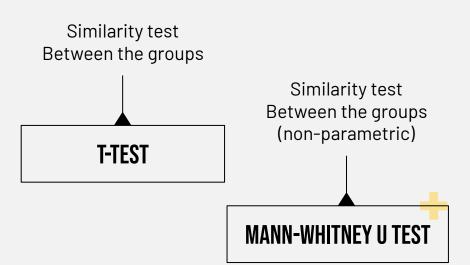


A/B TESTING











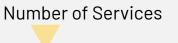








FUA Balance







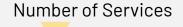


CUSTOMERS REACHED VS. NOT REACHED (6 MONTH)



FUA Balance











AGE GROUP	AGE INTERVAL
Young	20-39
Middle-Aged	40-59
Senior	>=60







AGE SEGMENTATION: CUSTOMERS REACHED VS. NOT REACHED (FUA BALANCE)



AGE GROUP	3 MONTH DATA	6 MONTH DATA
Young	Reached group:	Reached group:
(20-39)	22% higher	10% higher
Middle-Aged	Reached group:	Reached group:
(40-59)	10% higher	10% higher
Senior	Reached group:	Reached group:
(>=60)	13% higher	12% higher





AGE SEGMENTATION: CUSTOMERS REACHED VS. NOT REACHED (NO. OF SERVICES)



AGE GROUP	3 MONTH DATA	6 MONTH DATA
Young	No significant	No significant
(20-39)	difference	difference
Middle-Aged	Reached group:	Reached group:
(40-59)	5% higher	10% higher
Senior	Reached group:	No significant
(>=60)	6% higher	difference





KPI	BOTH CALLS VS. 3 WEEKS CALL ONLY	BOTH CALLS VS. 3 MONTHS CALL ONLY
FUA Balance	Both calling group has 13% higher	Both calling group has 49% higher
No. of Transactions	Calls not effective	Calls not effective
No. of Services	Calls not effective	Calls not effective









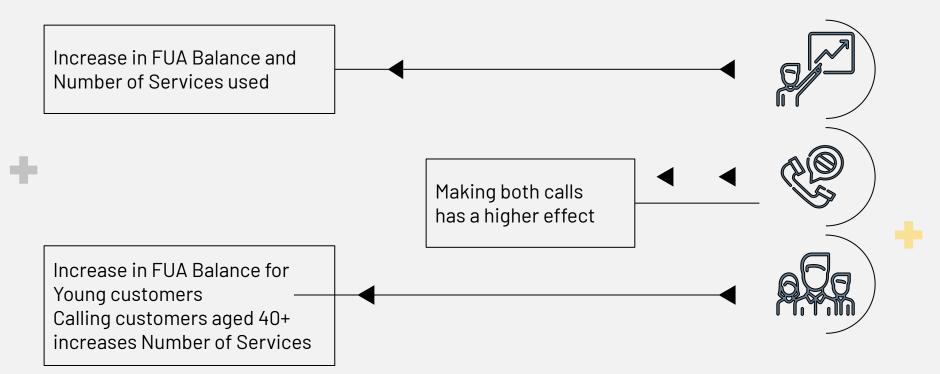
KPI	BOTH CALLS VS. 3 WEEKS CALL ONLY	BOTH CALLS VS. 3 MONTHS CALL ONLY
FUA Balance	Both calling group has 36% higher	Both calling group has 98% higher
No. of Transactions	Calls not effective	Calls not effective
No. of Services	Called twice: engage in 18% less services	Called twice: engage in 25% less services







CONCLUSION









SUGGESTIONS



- The campaign should continue for increasing customer's FUA Balance and Number of Services used
- Customers should be reached twice to increase their FUA Balance
- Customers between ages 20 39 should be reached the most for the highest increase in FUA Balance
- Customers above the age of 40 should be reached for increasing the number of services used





THANK YOU! ANY QUESTIONS?









Contribution

Jingyan Sun

- A/B Testing research and code
- Segmentation Analysis by age

Luisa Mercado

- A/B Testing research and code
- Conclusion and Suggestions (presentation)

Neha Borulkar

- Slides preparation
- EDA, Visualization

Parnian Taghipour

- Slide preparing
- Methodology and domain research

Sijia Cai

- A/B Testing research and code
- Edited Slides

