



FINTECH INDUSTRY

CAMPAIGN PERFORMANCE & CUSTOMER CONVERSION BEHAVIOR ANALYSIS

Conducted by: Phan Thị Định

Data Source: UCI Bank Marketing Dataset (Portuguese retail bank)

Record Count: 41,189 rows, 21 variables

Tools Used: Power BI / Excel



PROJECT INTRODUCTION & OBJECTIVES

WHY THIS PROJECT?

- Financial product campaigns often suffer from low conversion rates.
- Understanding customer behaviors and campaign effectiveness is key to optimization



PROJECT GOALS

✓ ANALYZE

customer profiles and behavior during the marketing campaign.

✓ IDENTIFY

what drives or hinders customer conversion.

✓ PROVIDE

actionable insights to enhance future campaign performance

DATA & METHODOLOGY

Data Features:

- Customer attributes: Age, Job, Education, Balance, Marital status, etc.
- Campaign details: Contact method, Day, Month, Call duration
- Outcome: Subscription to term deposit (yes/no)

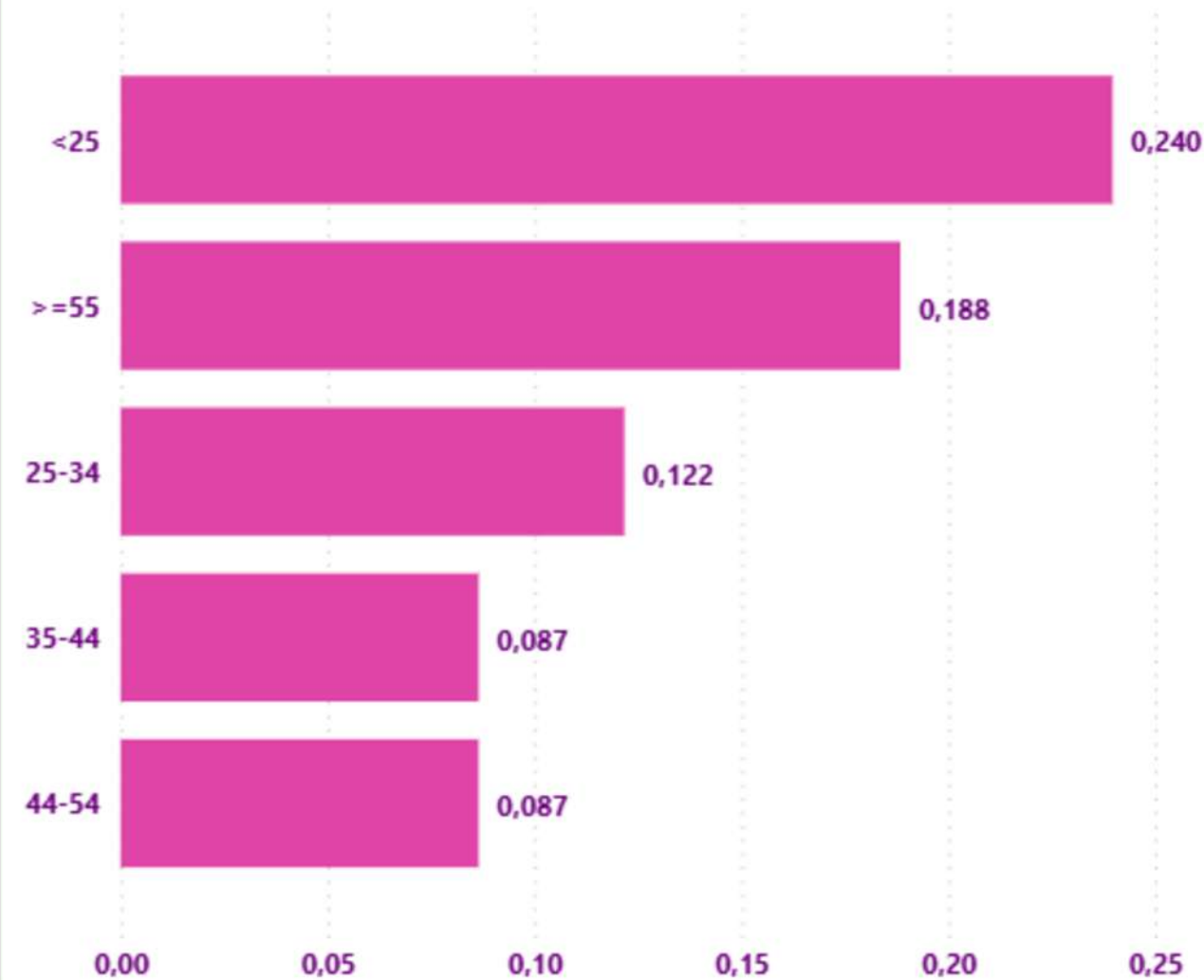
KEY TECHNIQUES

- ✓ **KPI BREAKDOWN BY SEGMENT**
- ✓ **BEHAVIORAL SEGMENTATION**
- ✓ **CONVERSION FUNNEL ANALYSIS**
- ✓ **TIME SERIES & COHORT PATTERN ANALYSIS**



DASHBOARD I – CUSTOMER BEHAVIOR

Conversion Rate by Age Segment



Total Targeted Customers

41K

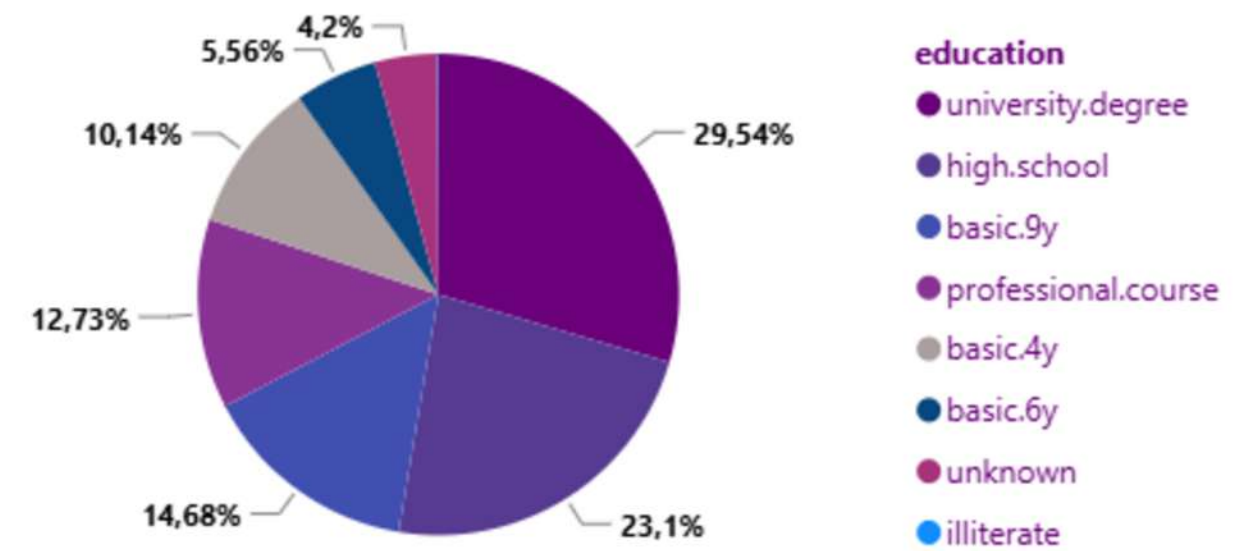
Overall Conversion Rate

0,11

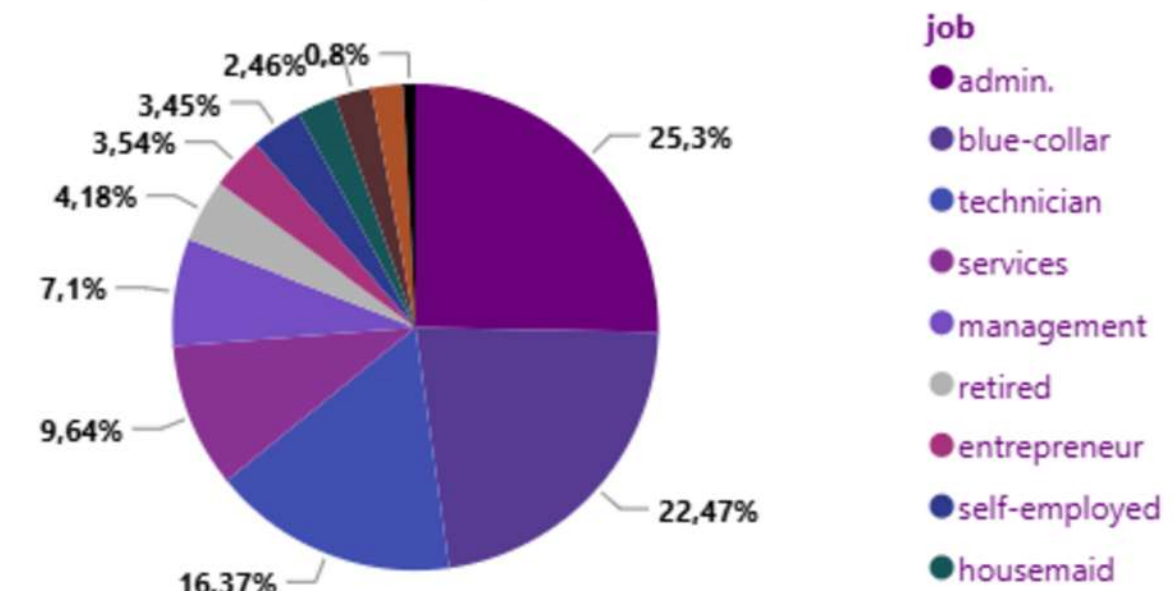
Total Successful Conversions

4640

Response Volume Breakdown by Education



Response Volume Breakdown by Occupation





INSIGHT 1

- Customers under 25 and over 55 have the highest conversion rates and should be prioritized in targeting.

INSIGHT 2

- University graduates dominate in response volume but not efficiency, suggesting mid-education groups are worth expanding into.

INSIGHT 3

Admin staff respond better during working hours, while blue-collar workers are more reachable during off-hours or weekends

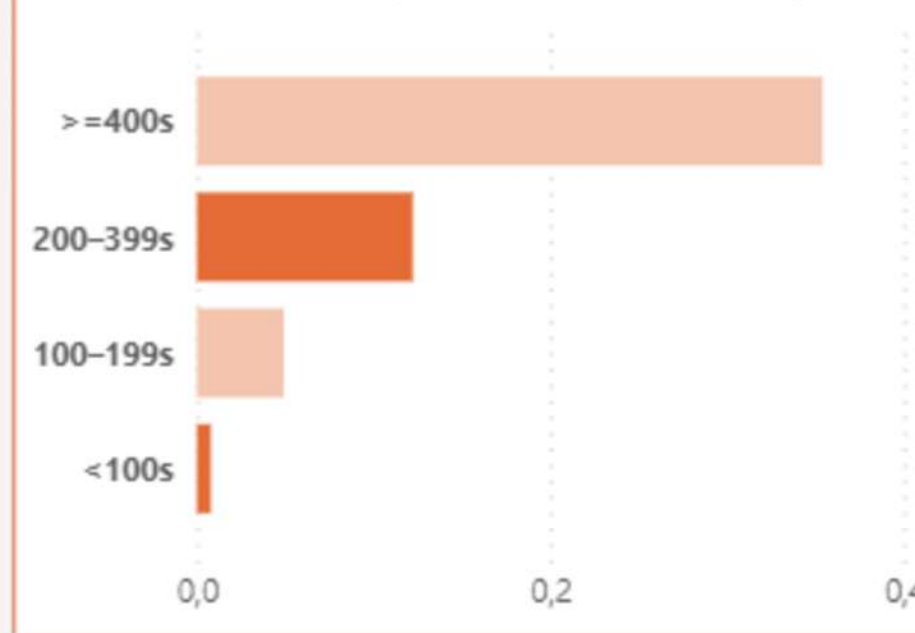


DASHBOARD 2 – CAMPAIGN PERFORMANCE

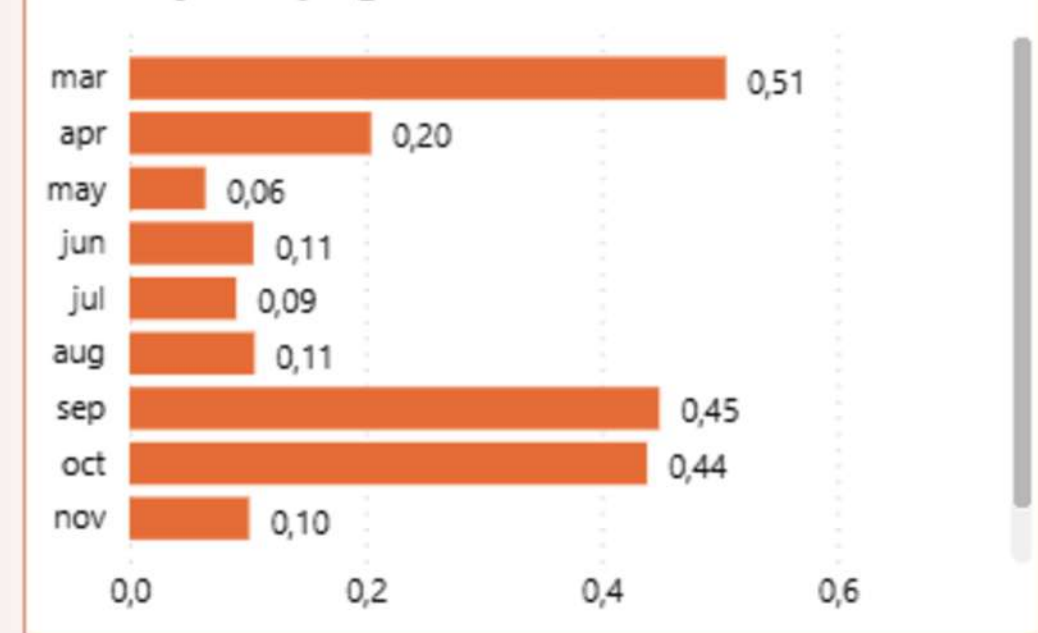
Conversion Rate by Campaign and Age Segment

campaign	<25	>=55	25-34	35-44	44-54	Total
1	0,27	0,22	0,14	0,10	0,10	0,13
2	0,26	0,20	0,12	0,09	0,09	0,11
3	0,25	0,17	0,12	0,08	0,09	0,11
4	0,15	0,14	0,11	0,08	0,07	0,09
5	0,16	0,09	0,10	0,06	0,06	0,08
6	0,11	0,14	0,07	0,08	0,05	0,08
7	0,06	0,15	0,08	0,02	0,05	0,06
8	0,00	0,13	0,04	0,03	0,02	0,04
9	0,33	0,11	0,06	0,04	0,06	0,06
10	0,00	0,06	0,05	0,06	0,05	0,05
11	0,00	0,08	0,12	0,05	0,02	0,07
12	0,00	0,00	0,00	0,07	0,00	0,02
13	0,50	0,00	0,04	0,03	0,05	0,04
14	0,00	0,00	0,00	0,04	0,00	0,01
15	0,00	0,11	0,08	0,00	0,00	0,04
16	0,00	0,00	0,00	0,00	0,00	0,00
17	0,00	0,50	0,06	0,04	0,07	0,07
18	0,00	0,00	0,00	0,00	0,00	0,00
19	0,00	0,00	0,00	0,00	0,00	0,00
20	0,00	0,00	0,00	0,00	0,00	0,00
21	0,00	0,00	0,00	0,00	0,00	0,00
22	0,00	0,00	0,00	0,00	0,00	0,00
23	0,00	0,00	0,00	0,20	0,00	0,06
24	0,00	0,00	0,00	0,00	0,00	0,00
Total	0,24	0,19	0,12	0,09	0,09	0,11

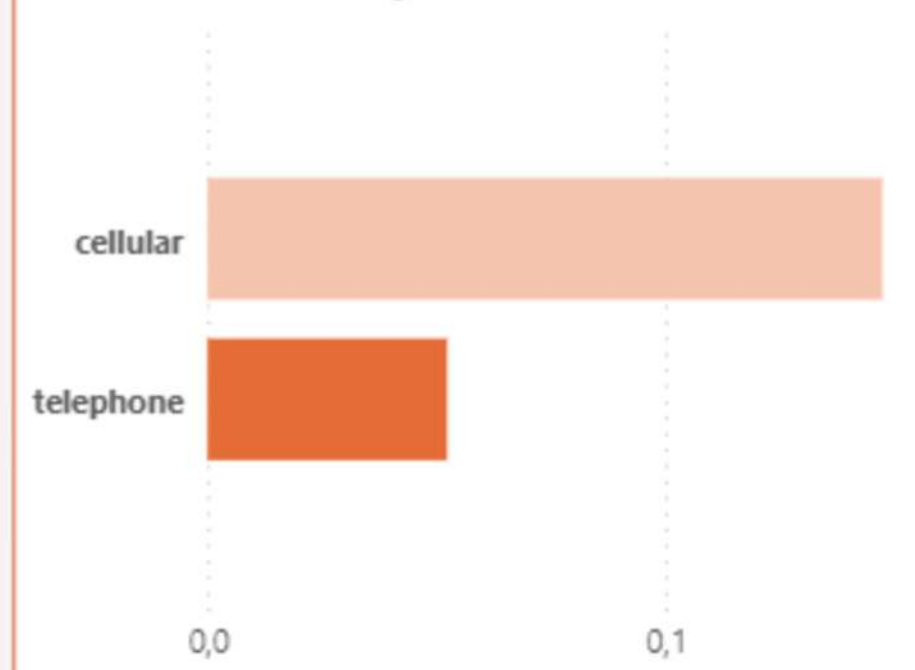
Conversion Rate by Call Duration Group



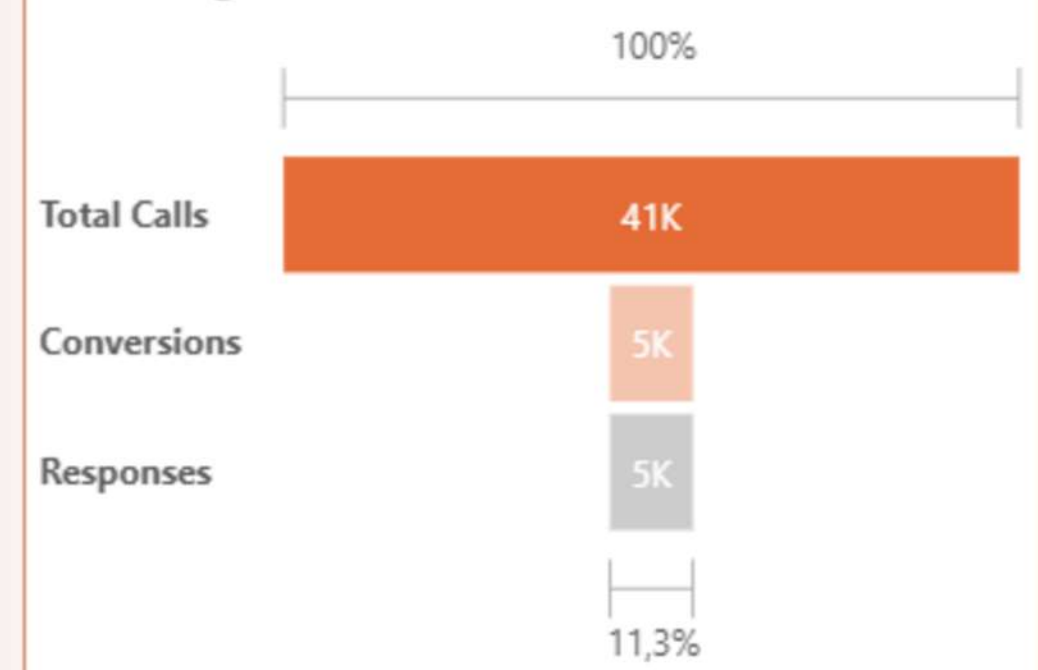
Monthly Campaign Conversion Performance



Conversion Rate by Contact Method



Marketing Funnel Performance Overview



KEY INSIGHTS FROM DASHBOARD II

I

- **INSIGHT 1**

Calls longer than 400 seconds deliver significantly higher conversion rates than shorter ones.

- **INSIGHT 2**

Mobile phone contacts are far more effective than landlines in driving responses.

II

- **INSIGHT 3**

Campaigns perform best in March, September, and October.

- **INSIGHT 4**

Conversion rates peak within the first 1–3 contact attempts and decline sharply afterward

III

- **INSIGHT 5**

The overall campaign achieved an 11.3% conversion rate with 5,000 conversions from 41,000 calls.

STRATEGIC RECOMMENDATIONS

PRIORITIZE <25 & 55+ SEGMENTS

TARGET MID-EDUCATION GROUPS

**ALIGN OUTREACH WITH JOB
ROUTINES**

TRAIN FOR 5–7 MIN CALL DURATION

FOCUS ON MOBILE CONTACTS

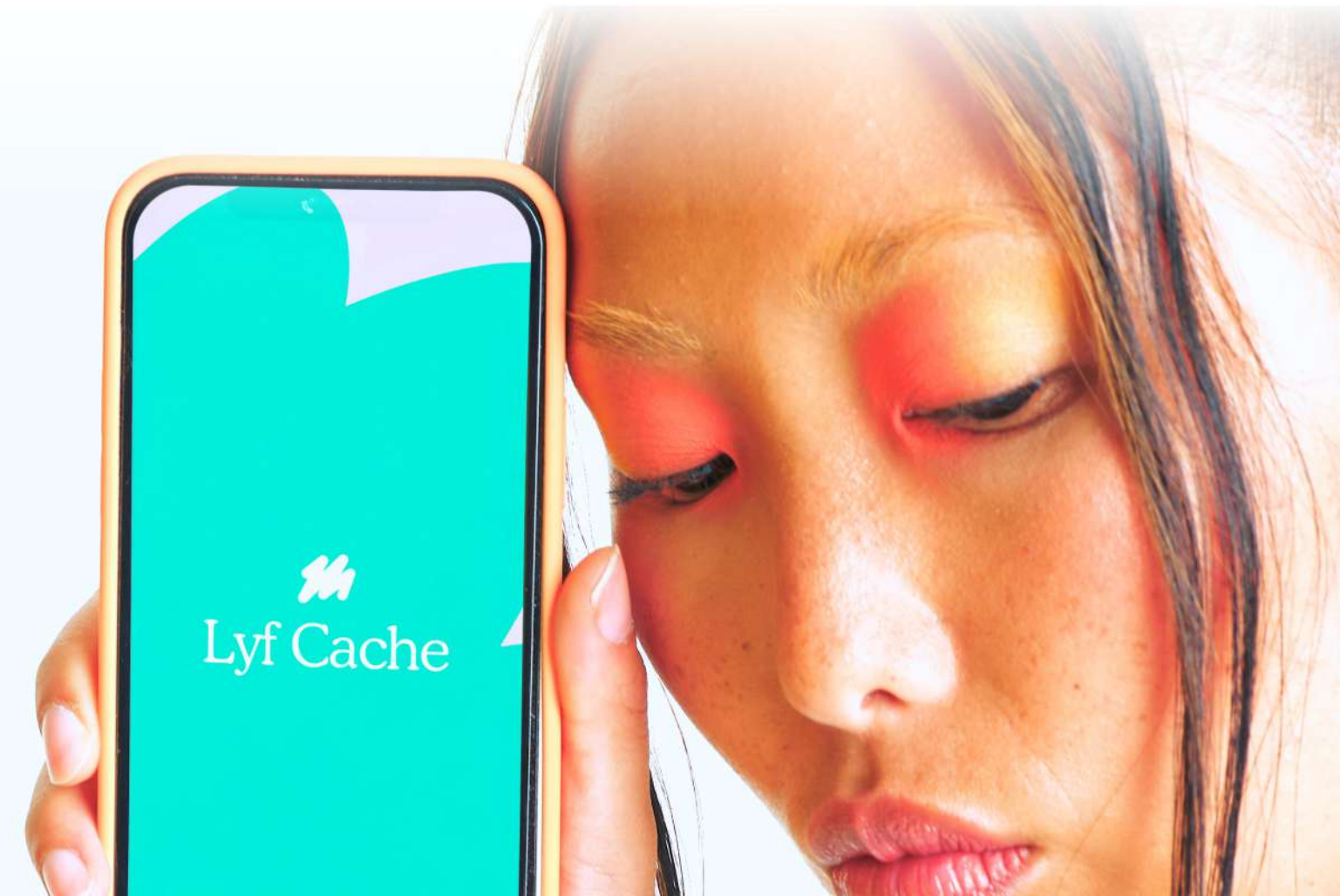
LAUNCH IN MAR, SEP & OCT

LIMIT TO 3 CAMPAIGN TOUCHES

OPTIMIZE CONVERSION FUNNEL

CONCLUSION

This analysis highlights clear paths to optimize marketing performance through data-driven targeting and timing. By focusing on the right segments and channels, future campaigns can achieve higher conversion rates with greater efficiency. The path forward is personalization at scale — powered by insight.





THANK YOU FOR YOUR ATTENTION

