**BANKING INSIGHTS REPORT**

**Prepare for:** Resume Portfolio

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**Date:** July 10, 2025

# Executive Summary

This report presents an analytical overview derived from the Bank Details Dashboard built in Tableau. It includes a combination of visual analyses to provide insights into customer demographics, account trends, and banking behaviors. The dashboard is intended to support decision-making across customer acquisition, segmentation, and service optimization.

# Key Insights

* Customer Segmentation: Insights suggest potential clustering based on demographics (e.g., age, gender, region) and financial behavior (e.g., account type, average balance).
* Account Trends: The analysis may reveal popular types of accounts held by customers, changes in balances over time, or trends across customer tenure.
* Geographic Distribution: Customers from certain regions or branches might show higher engagement or larger deposit volumes.
* Performance Metrics: KPIs such as total number of accounts, average account balance, and tenure distribution provide an overview of operational performance.

# Actions Performed in Tableau

* Data Cleaning & Preparation: Unnecessary columns removed; null or duplicate records cleaned; data types formatted.
* Worksheet Creation:  
   - Sheet 1: Customer distribution by region or gender.  
   - Sheet 2: Time series or tenure trend.  
   - Sheet 3: Financial metrics like average balance.  
   - Sheet 4: Account type-wise analysis.
* Dashboard Layout:  
   - Filters such as region, account type, or tenure.  
   - Interactive charts like bar graphs, pie charts, and KPIs.
* Formatting:  
   - Color-coded visual cues.  
   - Consistent legends, tooltips, and titles.

# Recommendations

* Targeted Campaigns: Use demographic segmentation to tailor marketing efforts.
* Branch Performance Review: Focus on regions with lower engagement or customer volumes.
* Account Management: Encourage conversion from basic to premium accounts by highlighting benefits.
* Customer Retention: Analyze tenure data to identify churn risks and implement loyalty programs.

# Visual Summary

|  |  |  |
| --- | --- | --- |
| Chart Title | Visualization Type | Key Focus Area |
| Customer Distribution | Bar / Pie Chart | Region, Gender, Account Type |
| Tenure Trends | Line Chart | Duration of customer engagement |
| Financial Overview | KPI / Bar Chart | Average Balance, Total Deposits |
| Account Type Insights | Clustered Bar Chart | Popularity of account types |

# Conclusion

The Bank Details Dashboard offers a cohesive overview of customer and account trends that can significantly enhance decision-making. With interactive capabilities and clean visualization, this tool can support strategy development in customer engagement, financial product performance, and operational efficiency.