**BI Banking overview document**

* **Project problem statement-**

The banking sector faces challenges in understanding and retaining its diverse customer base, especially given varying satisfaction levels, high churn rates among specific demographics, and frequent customer complaints. Key issues include identifying high-churn segments, addressing low satisfaction scores across membership tiers, managing complaints effectively, and ensuring that active members remain engaged. Additionally, there is a need to measure the financial impact of customer behaviors on overall revenue. This project aims to leverage customer data insights to develop targeted retention strategies, improve customer satisfaction, and enhance service delivery, ultimately driving revenue growth and fostering customer loyalty.

* **Project process and tools-**

Built visualization in POWER BI tackling the defined problems-

Types of visuals used-

* Drill through for customers based on Geography
* Customers based on age, geography and credit card holder **using Line and clomun clustered chart**
* Active member based on SATISFACTION SCORE AND CARD TYPE, **Stacked Column Chart**
* Complain by age gender and card type, **Line chart**
* Complain by age gender and card type, **Key Influencers chart**
* **Project Conclusion-**

After analyzing the customer data, a clear story emerged about the dynamics of customer satisfaction, loyalty, and churn within the bank's diverse customer base. We found that specific segments, particularly middle-aged customers, have higher churn rates, especially in regions like France and Spain. Older customers, however, tend to remain loyal and show higher engagement, indicating an opportunity to strengthen retention programs for this group. We also observed that satisfaction scores vary significantly across different card types, with certain tiers (e.g., Silver and Gold) showing lower satisfaction, possibly due to unmet expectations or service gaps. Furthermore, complaint trends reveal that younger customers and those with premium cards are more likely to express dissatisfaction, pointing to the need for enhanced service for these high-value customers.

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