Financial: Analysis on Customer data

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https://github.com/rahulgupta271/DSC680_Project_2_Financial_Analysis_Customer_data

Project 2 Check In

Any Surprises from the Domain?

As a way to get more acquainted with developments in financial
Customer data analysis, I chose this project. Apparently, there are a
million and one views on financial, and sadly, before realizing it really
has nothing to do with the details, I'm taking a look at, I'll be reading
about some idea I've never heard of and eventually get sidetracked.

The data I'm using is fairly straightforward for the most part and covers
a lot of characteristics besides just customer retention. The Job Status,
Marital status, Education status and Housing Loan are included. If either
of these correlates to shifts in financial customer data., it will be
important to see.

Data What I Thought it Would Be?

With very few "NA"s, the data is very clean. I have not worked a lot
with time interval data, but this will give me a good opportunity to get
my hands dirty with it given how and line of financial data is by month.

Any Adjustments?

I made no changes to my original query. I'd also like to see how financial can be influenced by job and loan status, but I'm still interested to see how external factors can drive or impede financial as well. Without any degree of speculation, it may be hard to determine, since I have no knowledge about what bank each bank number represents. For instance, if the jobs have fallen customer are moving to different bank.

I will try to conduct individual research banks using the available data, just to see how banks can retain their customer.

Method Working?

I've only been using Python (Jupyter Lab) to explore the data so far. I intend to continue that, but I want to try to build a nice Power BI dashboard of this information if time permits, as well. I will pursue it for future projects if I don't have time to do it for this one.

Challenges?

So far, trying to sort out what is and is not important is the biggest challenge I've encountered. I don't know the names of these banks or what data they use to retain customer, as I described above, so I think that any external variables can influence individual customer more than aggregate financial. I feel like I'm going to do more research in this case than initially expected.

Concluding Remarks

I'm also curious in seeing how banks are utilizing the customer data to retain and provide the fascinating products based on their customer needs. I will try to see the products bank are offering to the customer are generic or it is different for each customer based on the past behavior of the customer.