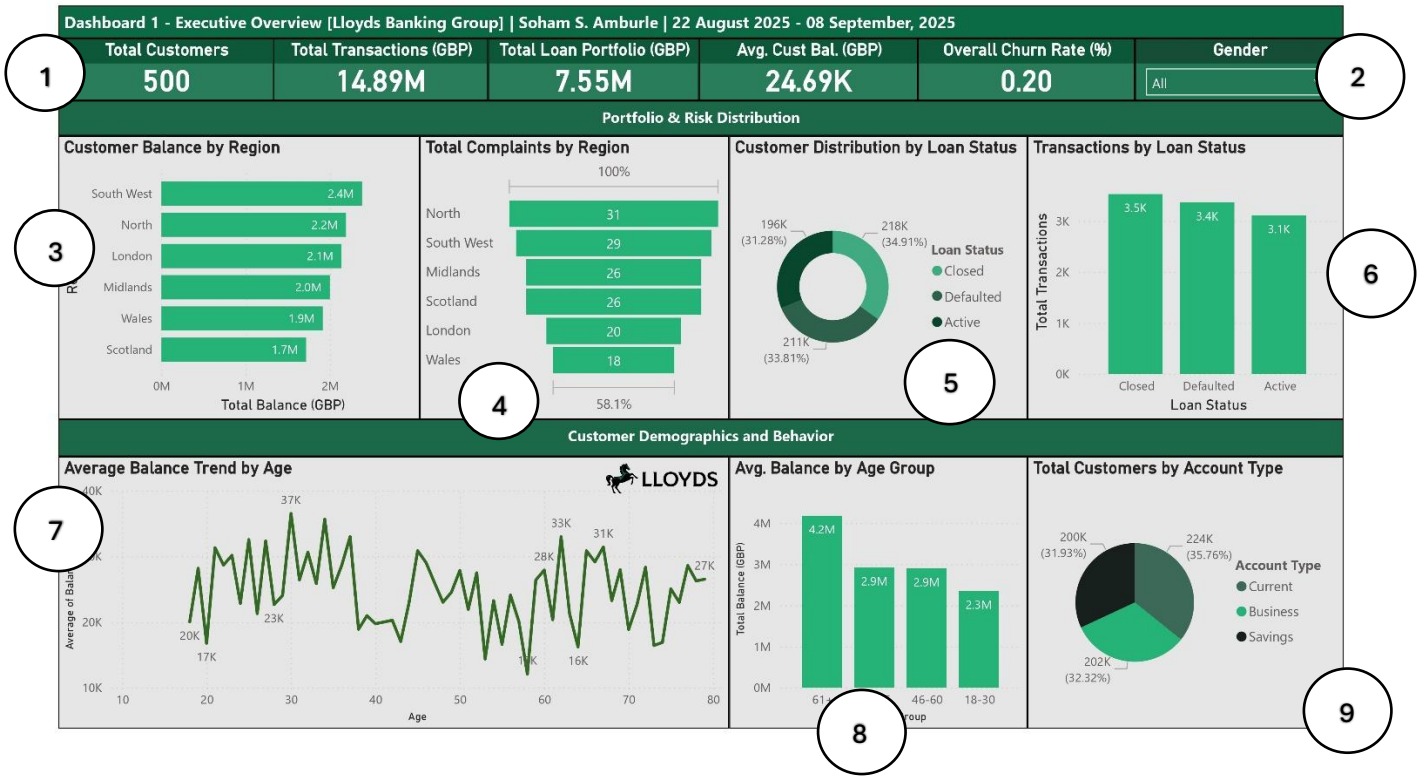
Lloyds Banking Group Customer 360 Analysis – Dashboard 1 – Executive Overview

The **Executive Overview** dashboard provides an overall summary of Lloyds Banking Group's retail banking performance. It highlights core KPIs such as total customers, loan portfolio size, transaction volumes, average balances, and overall churn rate, giving leadership a clear picture of customer engagement, financial exposure, and retention challenges.

Additionally, the regional and demographic breakdowns further reveal where balances are concentrated, where complaints are rising, and how different customer segments behave. This dashboard is designed as the entry point to the wider Customer 360 suite, with links to more detailed views in the Customer Profile (Dashboard 2), Loan Balance Analysis (Dashboard 3), Transaction Behaviour (Dashboard 4), and Retention Recommendation (Dashboard 5) dashboards.



Description -

1. **Cards:**
   - **Total Customers, Total Transaction (GBP), Total Loan Portfolio (GBP), Avg. Cust. Bal. (GBP), Overall Churn Rate (%)**: These headline KPIs provide a snapshot of customer engagement, financial activity, lending exposure, and attrition. Executives can instantly gauge the bank's scale, liquidity, and retention health.
     👉 For deeper demographic and financial breakdowns, refer to **Dashboard 2 (Customer Profile)**. For churn specifics, see **Dashboard 5 (Retention Recommendation)**.

2. **Slicers:**
   - **Gender**: Enables filtering of the entire dashboard by customer gender, making it possible to quickly test differences in balances, complaints, and churn patterns.
     👉 For a fuller demographic drill-down, refer to **Dashboard 2 (Customer Profile)**.

3. **Customer Balance by Region (Stacked Bar Chart)**: Shows how customer balances are distributed across regions, highlighting geographical strongholds and areas with weaker financial engagement. This helps direct regional growth or service improvement strategies.

4. **Total Complaints by Region (Funnel)**: Visualizes complaint volumes across regions, flagging hotspots of dissatisfaction. Combined with balance insights, this highlights regions where both high engagement and high dissatisfaction exist, signaling where corrective action may be urgent.
   👉 For a more granular complaints view at the customer level, refer to **Dashboard 2 (Customer Profile)**.

5. **Customer Distribution by Loan Status (Donut Chart)**: Breaks down customers by active, closed, and defaulted loans. This offers an immediate perspective on loan portfolio health and customer repayment behavior.
   👉 For deeper portfolio and risk exposure insights, see **Dashboard 3 (Loan Balance Analysis)**.

6. **Transactions by Loan Status (Clustered Column Chart)**: Examines how transaction volumes differ based on loan status, linking financial activity to repayment behavior. This helps identify risk-prone segments where defaults may correlate with reduced engagement.
   👉 For broader transactional insights, refer to **Dashboard 4 (Transaction Behaviour)**.

7. **Average Balance Trend by Age (Line Chart)**: Tracks how average balances evolve across different age groups. This reveals generational wealth accumulation patterns and helps target financial products to the right customer segments.
   👉 For additional demographic analysis, refer to **Dashboard 2 (Customer Profile)**.

8. **Avg. Balance by Age Group (Clustered Column Chart)**: Complements the trend chart by directly comparing average balances across age brackets, confirming disparities in financial stability across generations.

9. **Total Customers by Account Type (Pie Chart)**: Illustrates customer distribution across account types (Current, Savings, Business). This highlights which products dominate customer adoption and where product diversification or retention efforts should focus.
   👉 For churn risk tied to account types, see **Dashboard 5 (Retention Recommendation)**.

With this, the Executive Overview Dashboard brings the project to a close by offering a consolidated, high-level view of Lloyds Banking Group's customer base, financial portfolio, and churn dynamics. While this dashboard provides a strategic snapshot for decision-makers, deeper analysis can be explored through the supporting dashboards: **Dashboard 2 – Customer Profile**, **Dashboard 3 – Loan Balance Analysis**, **Dashboard 4 – Transaction Behaviour**, and **Dashboard 5 – Retention Recommendation**. Together, these dashboards create a comprehensive Customer 360 framework, enabling both executive oversight and detailed operational insights.

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