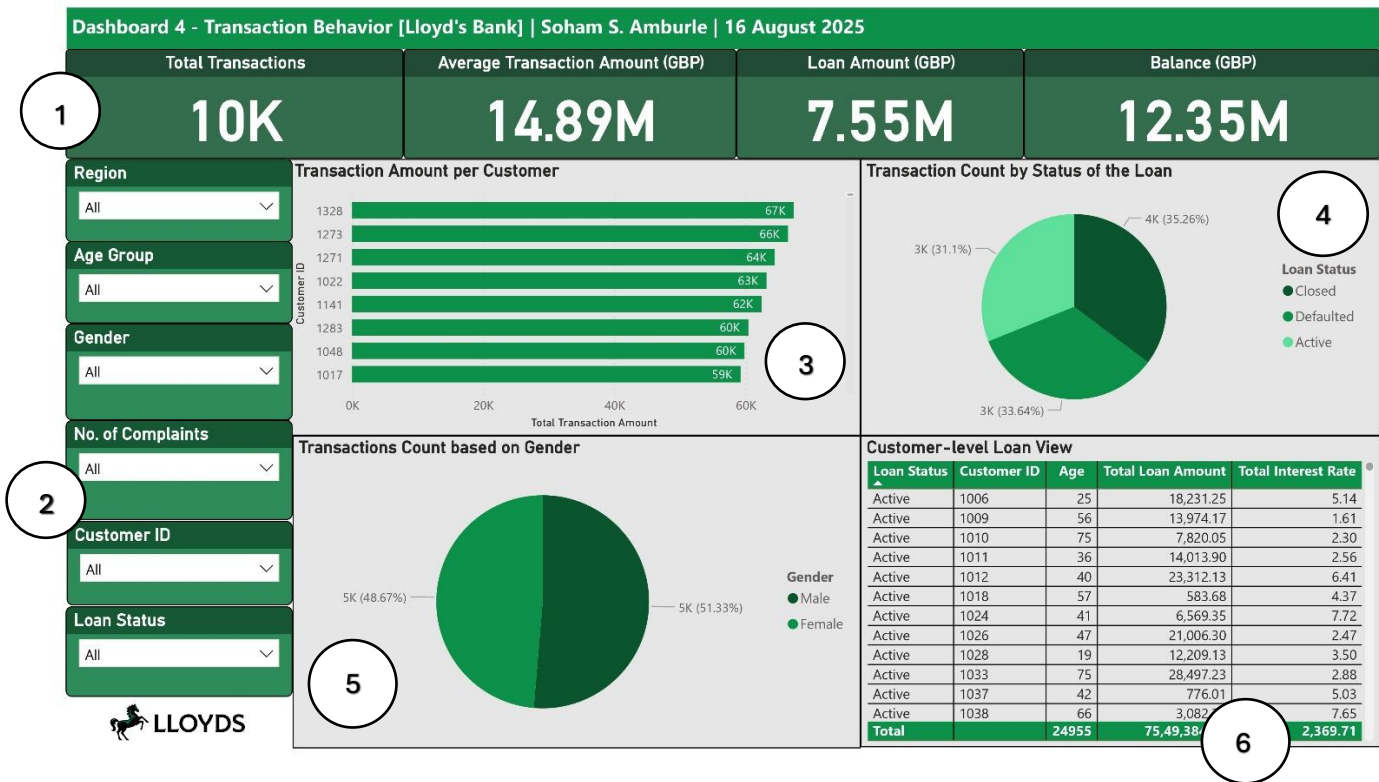


## Lloyd's Customer 360 Analysis – Dashboard 4 – Transaction Behaviour

This **Transaction Behaviour Dashboard** provides decision-makers with valuable insights into customer transaction patterns, spending behavior, and demographic influences. By analyzing transaction counts, amounts, and customer segments, this dashboard helps identify high-value customers, demographic differences in activity, and potential risk signals. The interactive slicers allow for tailored analysis, enabling teams to filter by **age group, customer id, region, gender, loan status, and complaints**. This dashboard supports data-driven decisions on **customer engagement, churn prevention, and financial planning** by highlighting key trends in transaction behaviour across different customer groups.



### Description -

#### 1. Cards:

- **Total Transactions:** Displays the overall number of transactions recorded across all customers, providing a quick snapshot of total activity in the retail banking dataset.
- **Average Transaction Amount (GBP):** Represents the average value of a transaction in GBP, helping identify customer spending behavior and transaction trends.
- **Loan Amount (GBP):** Captures the total loan amount availed by customers, highlighting the extent of credit utilization within the customer base.
- **Balance (GBP):** Reflects the cumulative account balances of all customers, offering insights into retained deposits and overall liquidity with the bank.

#### 2. Slicers:

- **Region:** Enables filtering of customer data by their geographical location, supporting regional transaction and loan behavior analysis.
- **Age Group:** Allows segmentation of customers into defined age brackets (e.g., 18–30, 31–45, 46–60, 60+) to analyze generational differences in transaction and loan patterns.
- **Gender:** Provides the ability to filter transaction and loan data by male and female customers, supporting demographic-based insights.
- **No. of Complaints:** Filters data based on the number of complaints raised by customers, useful for correlating customer dissatisfaction with transactional and loan activity.
- **Customer ID:** Facilitates drill-down to individual customer-level data, enabling detailed investigation of specific accounts.

- **Loan Status:** Allows filtering of customers based on the status of their loan (Active, Closed, or Defaulted), giving flexibility in analyzing risk exposure.
- 3. **Transaction Amount per Customer (Column Chart):** A clustered bar chart that visualizes the total transaction amount for each customer. This helps identify high-value customers, spending concentration, and overall distribution of transaction amounts across the customer base.
- 4. **Transaction Count by Status of the Loan (Pie Chart):** A pie chart that breaks down transactions based on the status of customer loans (Active, Defaulted, Closed). This visualization highlights the relationship between loan repayment behavior and transactional activity, surfacing potential risk areas where defaults may be higher.
- 5. **Transaction Count based on Gender (Pie Chart):** A gender-based distribution of total transactions. This visualization provides insights into how transaction activity is divided between male and female customers, supporting demographic-based customer behavior analysis.
- 6. **Customer-level Loan View (Table):** A detailed table displaying loan-related metrics at the customer level. Columns include Loan Status, Customer ID, Age, Total Loan Amount, and Total Interest Rate. This view supports granular analysis of loan performance, customer demographics, and associated costs, bridging the gap between transactional data and loan portfolio health.

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