

## Project Proposal

### Executive Summary:

A manager at the bank is disturbed with more and more customers leaving their credit card services. They would really appreciate if one could predict for them who are likely going to churn so they can proactively go to the customers to provide them better services and turn customers' decisions in the opposite direction.

The reason I chose this topic is I find this case is very challenging with a common real world business case. It will be very interesting to see the analysis and data visualization using Tableau.

### Who

- Stakeholders – Manager of the bank, Leaderships and Board Members of the bank
- Audience
  - Quantitative Audience
  - Snapshot: Bankers, Median Age - 55, M/F 50/50%, 20% do not have an educational background in business or finance.
  - Qualitative Audience Snapshot: Persona 1: Kelly

Persona 1: Kelly (Bank's Credit Card Manager)



**Role:** Bank's Credit Card Manager

**Age:** 46

**Gender:** Female

**Education:** MBA

**Goals:**

- Wants quick clear and credible updates
- Wants to ensure financial stability and make the bank more efficient
- Wishes to end credit card customer churn
- Prefers data-driven decision making

**Challenges and Needs:**

Kelly has heard anecdotal reports of the high bank credit card customer churn rate. She would really appreciate if one could predict for the bank who are likely going to churn so they can proactively go to the customers to provide them better services and turn customers' decisions in the opposite direction.

**Context:** Monthly board meeting. There are 12 people in the audience looking at a big screen across a large room and also have a printed summary (handouts).

I am interested in any idea/analysis that will make this bank more financially stable

*Kelly is a conservative, highly connected and financially-oriented manager. She feels a responsibility for ensuring the financial stability of the company.*

- Subject-Matter Experts - Business Intelligence Analyst

## **What**

- Data Sources – Kaggle: Credit Card Customer, Predict Churning Customers  
<https://www.kaggle.com/sakshigoyal7/credit-card-customers>
- Data Quality – 100% useable
- Data Timeliness – Last data collected in this set: December 2020

## **Why**

- Business Case/Other Goals – Create a single view infographic and a mobile-friendly version of a story offering perspective about the goal of type of credit card customers that will likely to churn based on the existing data. Also create a dashboard and three-part Tableau presentation using Story Points for an internal presentation/discussion.

## **How**

- Format - narrated dashboard with story points
- Presentation Vehicle – Tablet, mobile phone, desktop, and projector.

## **Challenges**

- This dataset has 10,127 customers mentioning their age, salary, marital status, dependent, education, credit card limit, credit card category, etc. There are about 18 features. So we only have a limited feature and limited data.
- We have only 16% of customers who have churned. Therefore, it is a bit difficult to find accurate customer type/category that will likely to churn.
- Do you have any constructive ideas/feedbacks?