



World Plus

“Lead Prediction System”

AGENDA

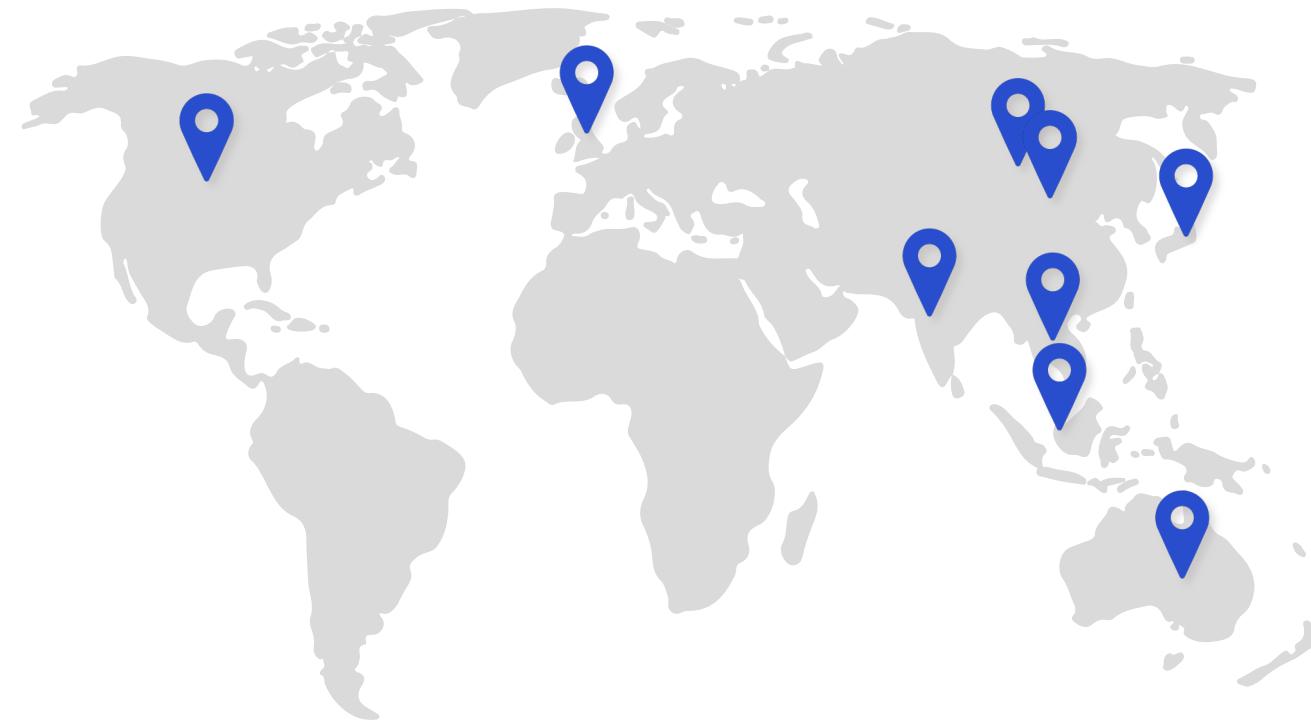
-  **Why "A GRADE"**
-  **Our Understanding**
-  **Pain Points**
-  **Our Proposed Lead Prediction System**
-  **Potential Risks and its Solutions**
-  **Scope of Work & Timeline**

Why “A Grade”

A Grade Consulting specialises in analytics solutions for the financial and insurance sector across countries, with over 10 years of experience.

Analytics solution projects sample:

- New target customers lead
- Customer churn
- Customer satisfaction



Our clients:



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Our Understanding- Importance of Lead Conversion

Lead Conversion stands at the core of the bank's success, involving all marketing strategies that stimulates customer interest, and guide them towards making purchase decisions. This crucial step is directly tied to achieving business success; many companies invest significantly to improve lead conversion.

Business Success



Revenue Generation



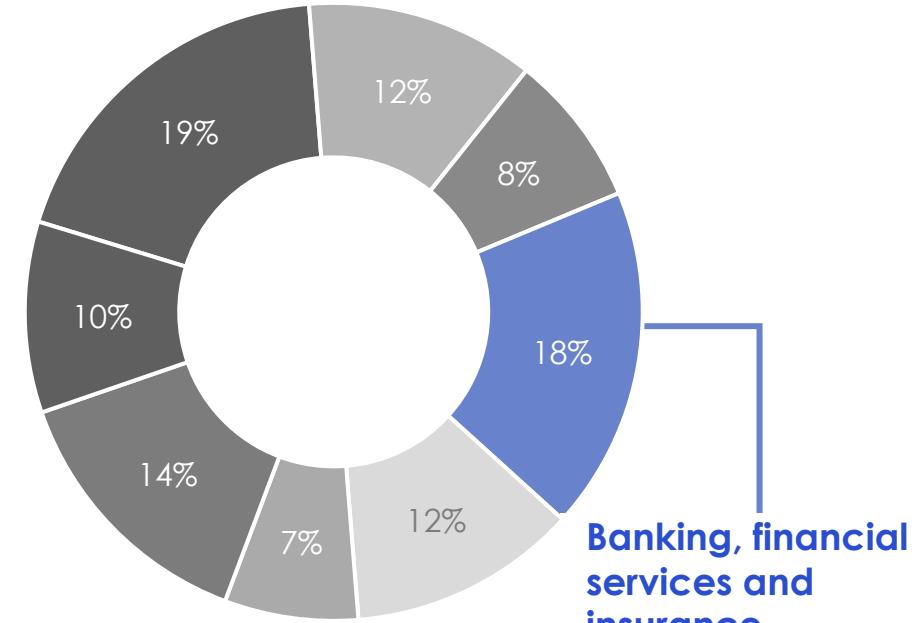
Customer Retention



Market Competition

BIGGEST USERS OF MACHINE LEARNING

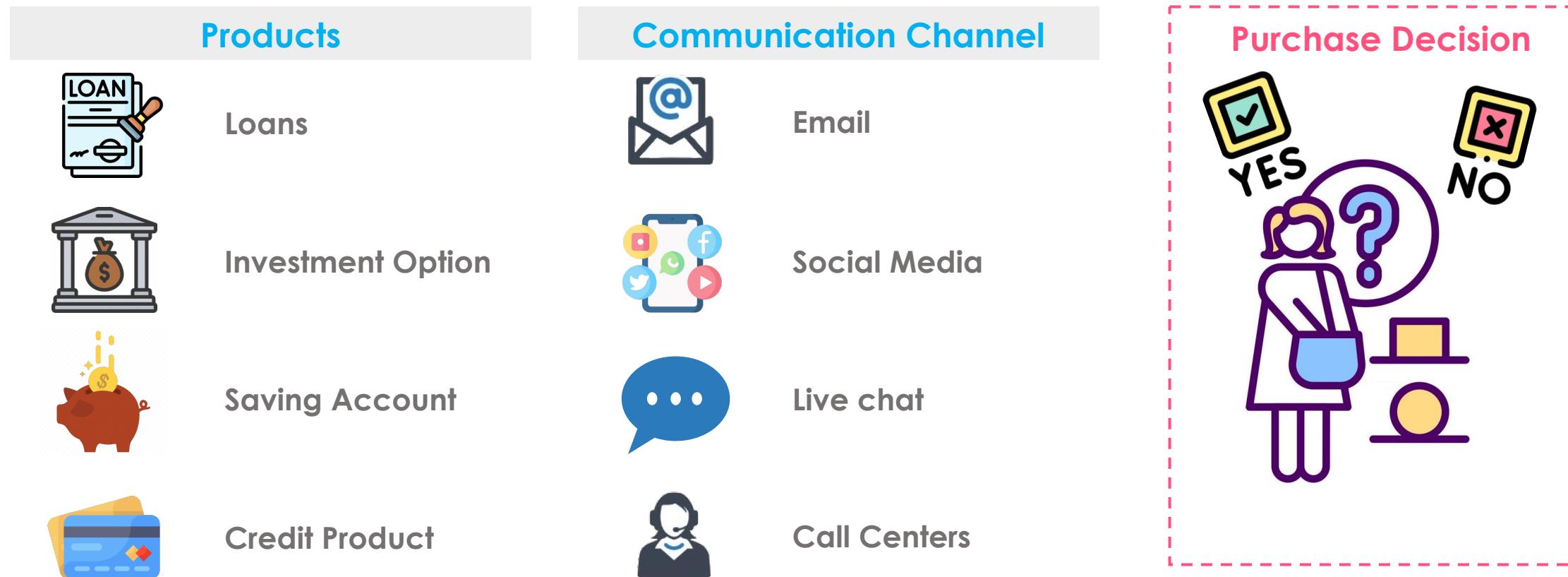
- IT and communications
- Healthcare
- Advertising and media
- Banking, financial services, and insurance
- Retail
- Others
- Automotive and transport



Source: Fortune Business Insights, 2022

Our Understanding- World Plus

World Plus uses various communication channels to enhance lead conversion. However, determining which product aligns well with each communication channel to influence purchase decision is a challenge.



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Pain Points

The mis-identification of prospective customers who will purchase the new term deposit product is causing several issues, such as not strategically using communication channels, and causing unnecessary expenses in marketing and sales operations.

Pain Points

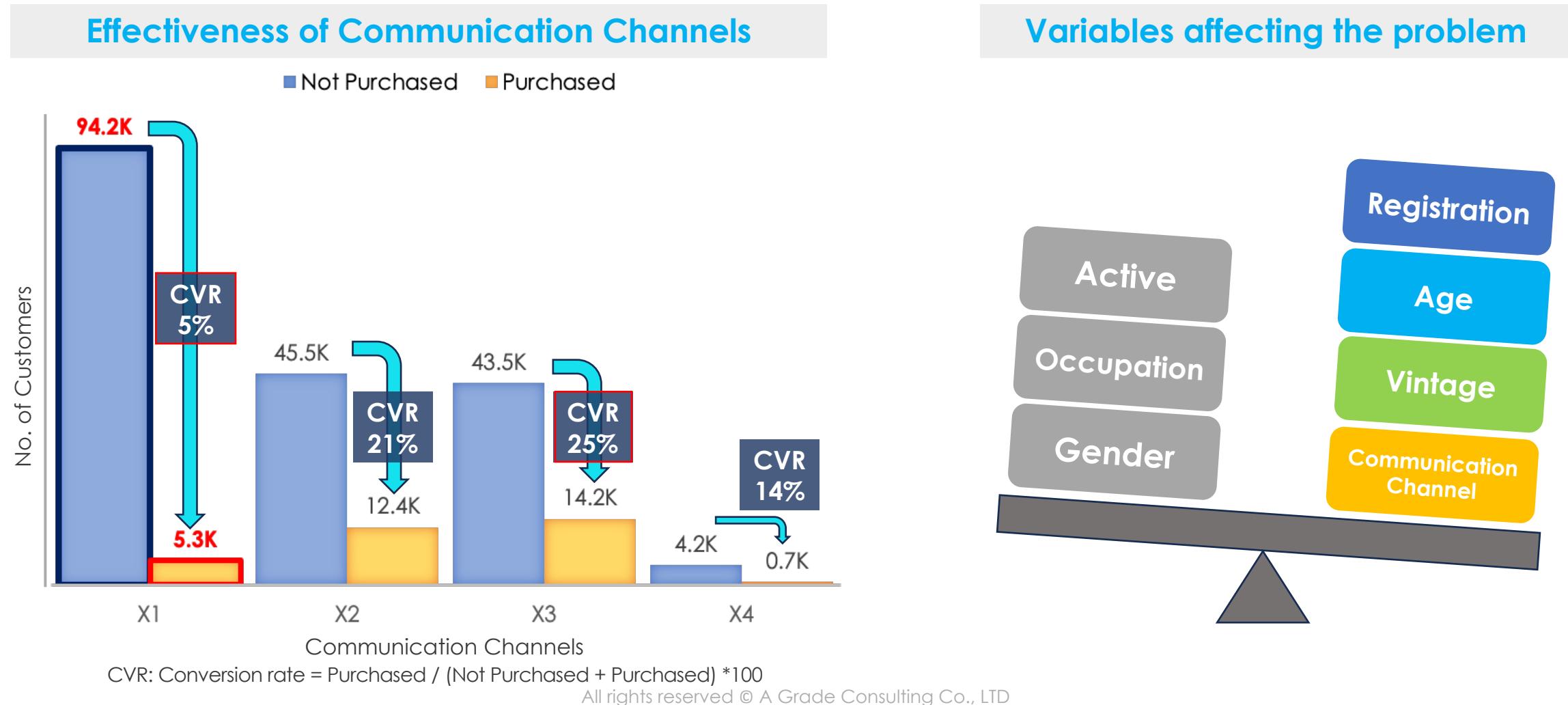
-  ***Not accurately identifying leads for the new Term Deposit product***
-  ***Not able to strategically use communication channel; end up **sending communication to uninterested customers*****
-  ***Unnecessary expenses in time and money, as well as **opportunity costs** in sales and marketing operations***



Pain Points – Initial Observations

Mis-use in the communication channels, as X1 has the lowest conversion rate.

Other variables such as "Registration", "Age" and "Vintage" were also noticed to be affecting the problem.

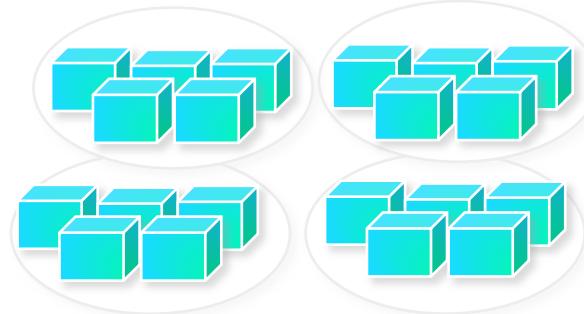
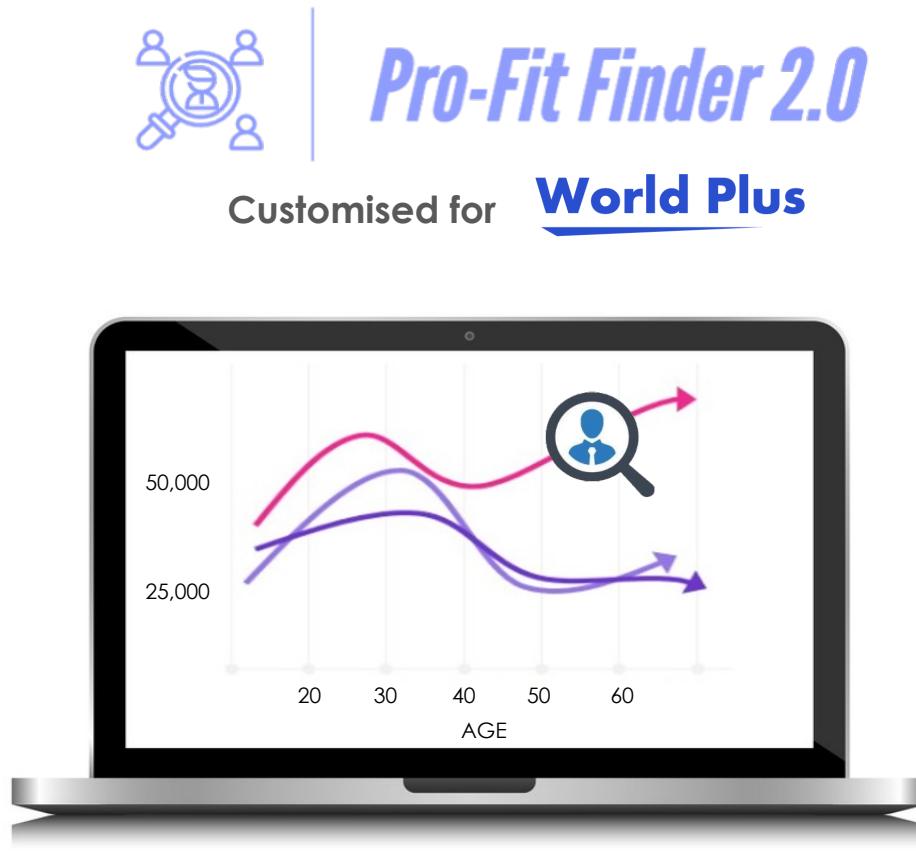


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Our Proposed Lead Prediction System

1 of 20 models is selected as the best approach for the lead prediction system “Pro-Fit Finder 2.0”



5 Selected Models x 4 different attributes

= 20 models



One best model



Pro-Fit Finder 2.0

Our Proposed Lead Prediction System

Our cutting-edge technology is designed to help World Plus excel in four key areas, providing World Plus with the tools and resources necessary for success.



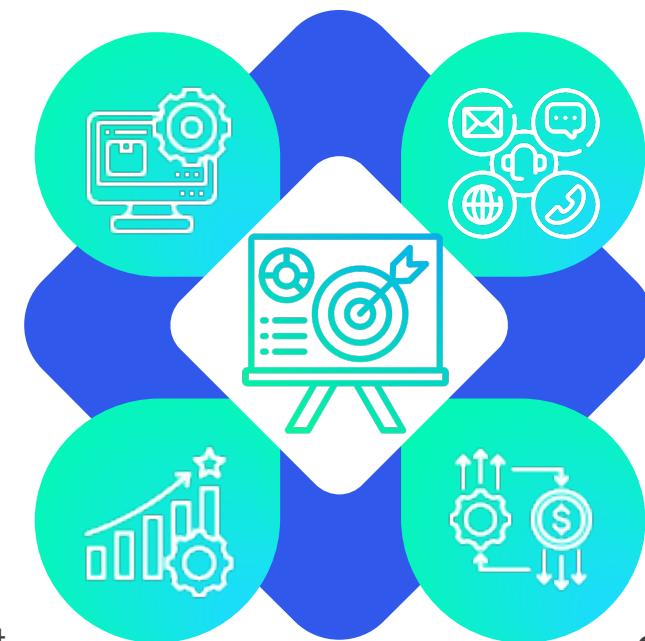
Pro-Fit Finder 2.0

Customised for **World Plus**



Perform **Predictive modelling system** to identify new customers for **term deposit** product

Upscaling business performances after deployment

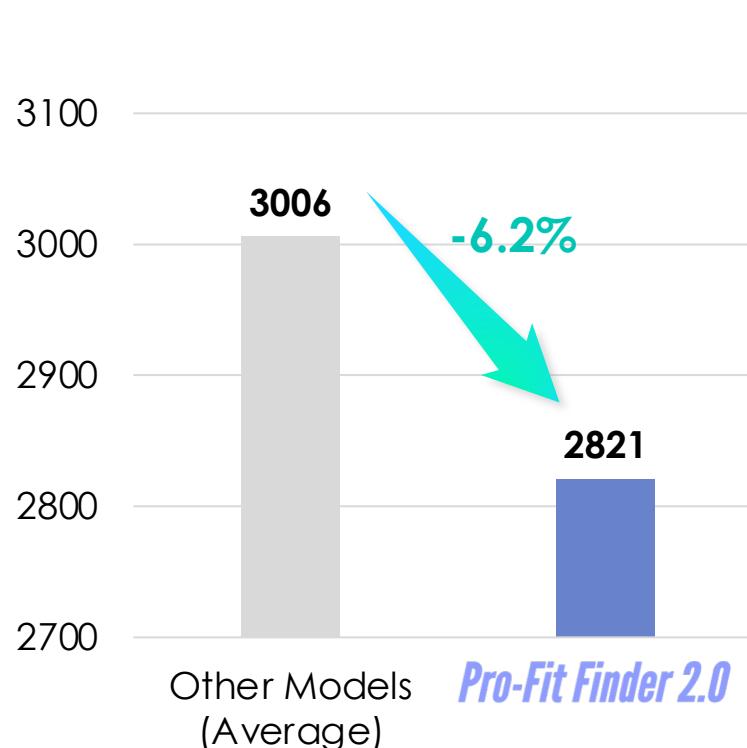


Analysis of appropriate communication channel for new target customers

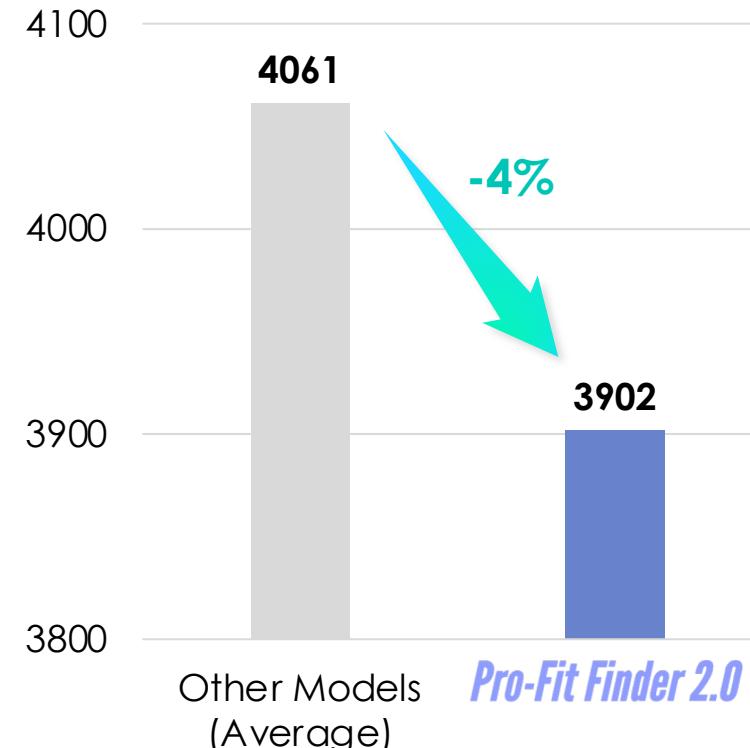
Reduce unnecessary expenses & opportunity costs

Our Proposed Lead Prediction System

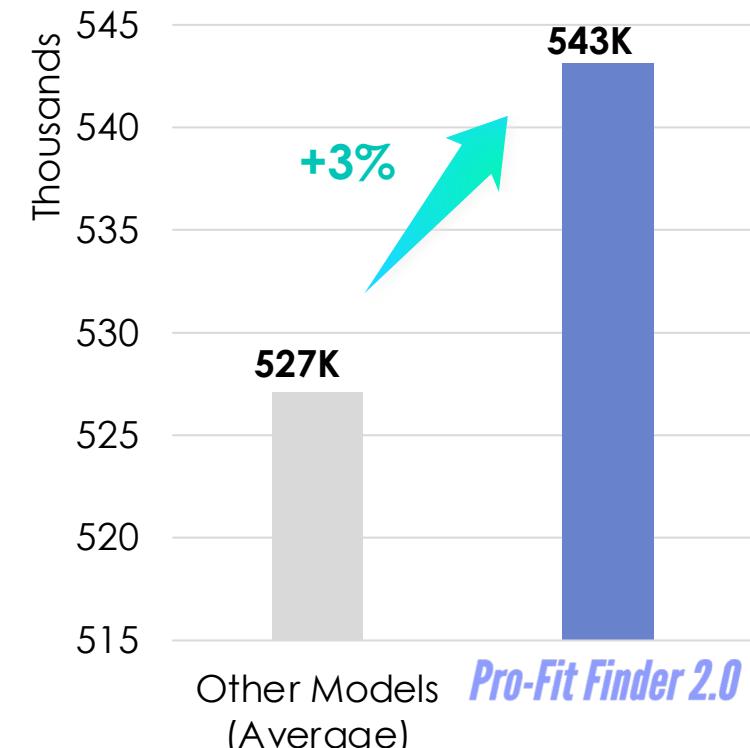
Number of Mis-forecasted Customers



Number of Missed Opportunities



Overall Expected Profit



Accuracy



90%

Percentage of Correct Predictions

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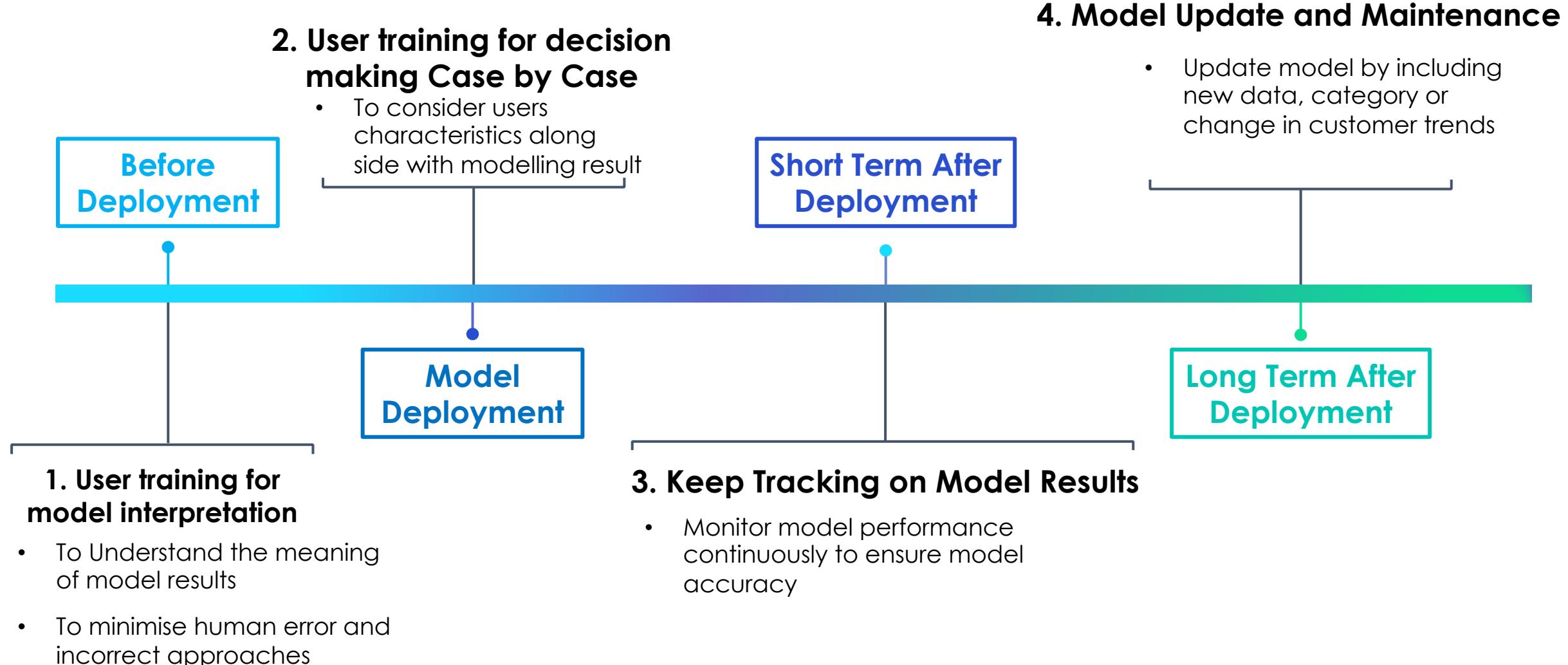
Potential Risks

The four potential risks that might influence Pro-Fit Finder 2.0 are listed below:



Risk Mitigation Solutions

To mitigate risks, we keep tracks of all process during system implementation from pre-to-post system deployment.

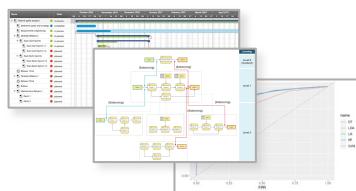
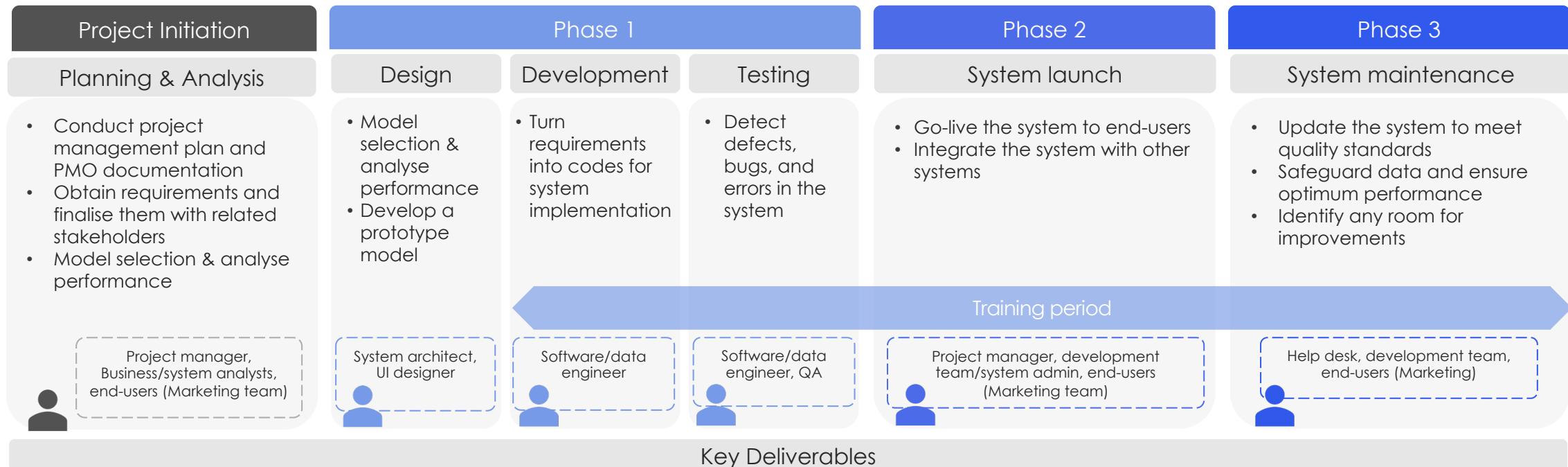


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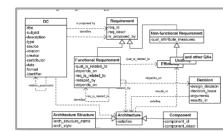
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Proposed Scope of Work

Apply system development life cycle (SDLC) for World Plus' lead prediction system for high-quality software on budget & on time.



- Project Plan
- Data flow diagram (DFD/ERD)
- Model analysis (i.e., AUC)



- Software design document (SDD)



- Source code documentation
- Test cases
- Training material
- User Acceptance Testing (UAT)



- Test plan
- Test cases and scenario



- System performance dashboard



Thank You

A Grade Consulting Co., Ltd

www.AGradeConsulting.com