SHIELD INSURANCE

- Home page
- General
- Age
- Sales Mode

Project By ~
Akshat Jain

SHIELD INSURANCE

Problem Statement for Shield Insurance :

Context :

Shield Insurance aims to enhance its analytics capabilities to better monitor customer acquisition, premium revenue, and policy performance across cities, age groups, and sales modes .

Problem:

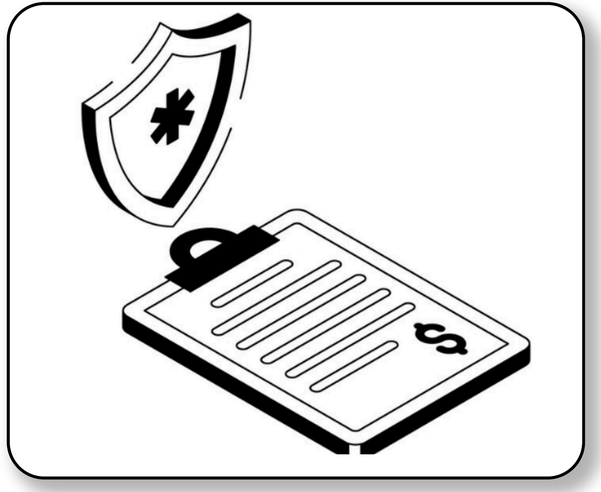
Currently, there is no dynamic system to track daily growth, customer demographics, or sales channel effectiveness, limiting strategic insights .

Stakeholder Focus Areas :

- Track total customers, revenue, daily growth rates.
- Analyze month-over-month policy trends.
- Segment customers by age group and city.
- Build switchable revenue vs customer trend graphs.
- Enable filter-based analysis (sales mode, age, city, month, policy ID).
- Create dedicated pages for **Sales Mode Analysis** and **Age Group Analysis** .

Objective :

- Develop an interactive dashboard to drive faster, smarter, and more informed business decisions .



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Clear all slicers

Sales Mode	Age Group	City	Month	policy_id
All	All	All	All	All

Revenue

Customers

Revenue
₹989.25M
Rev. till LM 836M
Rev Chg % 18.40%

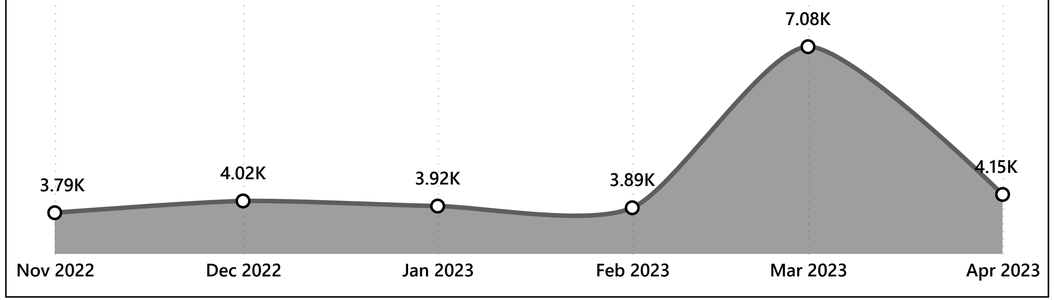
Policy Sales
26.84K
Customers LM : 22.7K
Chg % 18.28%

DRG
5.47M
DRG LM : 5.53M
DRG CHG % : -1.22%

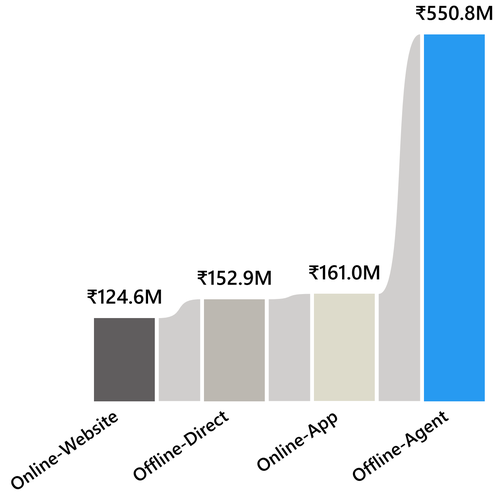
DCG
148.29
DCG LM 150.28
DCG CHG % -1.32%

Revenue / Policy sales
36.86K

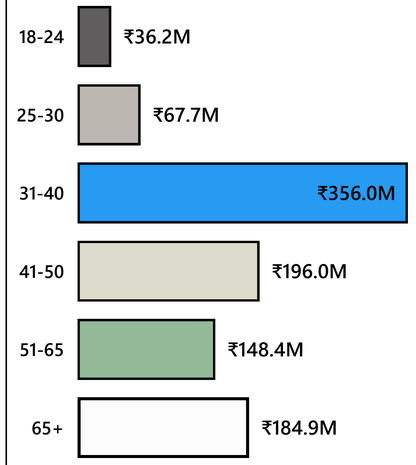
Customer / Policy Sales Over Time



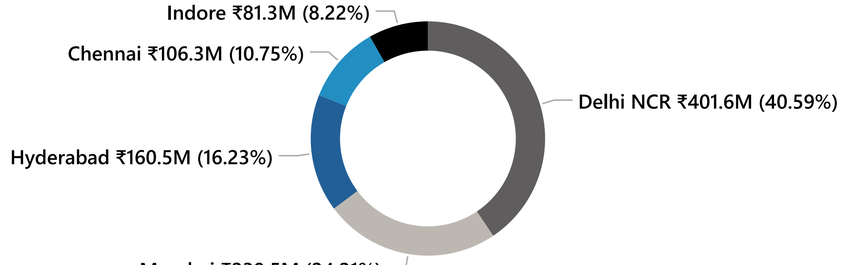
Contribution of Mode of Sales



Revenue by Age



City Contribution to Revenue & Customers



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sales_mode	customer_age_...	city	month_name	policy_id
All	All	All	All	All

Revenue KPI

₹153.75M !

LM : 263.84M (-41.73%)

4/30/2023

Policy Sales KPI

4.15K !

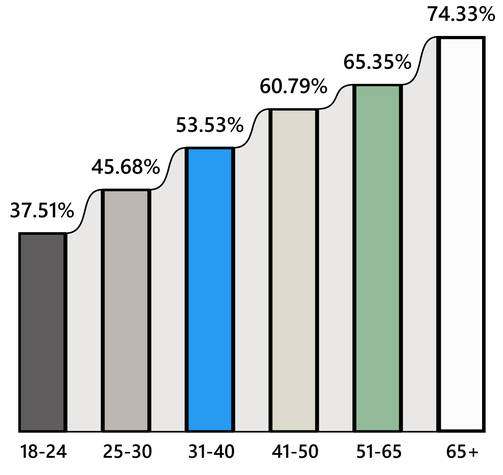
LM : 7.08K (-41.41%)

4/30/2023

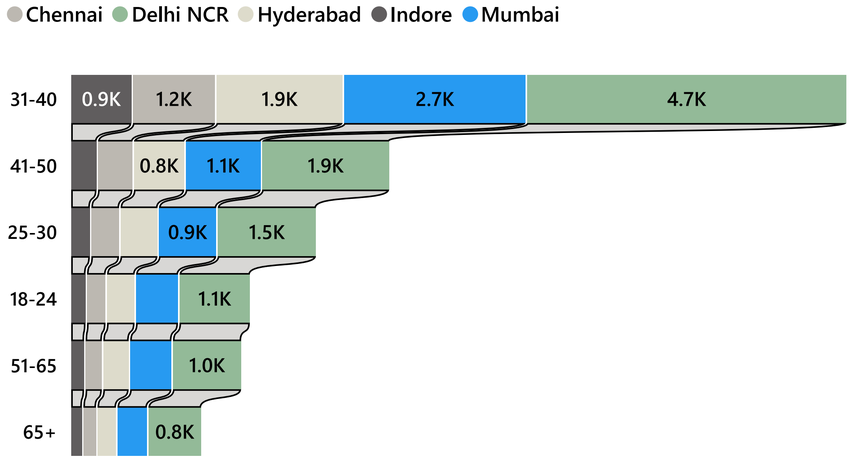
Total Revenue	Policy Sales	Avg. Settlement %	Avg. Age
989.25M	26.84K	61.89%	40

Settlement % | Revenue

Avg. Settlement % by Age Group



No. of Policies Sold by Age Group



Age Group	Customers / Policies Sold	Total Revenue
31-40	11455	₹356.03M
Offline-Agent	6164	₹192.81M
Online-App	1954	₹59.09M
Online-Website	1650	₹52.46M
Offline-Direct	1687	₹51.67M
41-50	4699	₹196.02M
Offline-Agent	2679	₹111.37M
Offline-Direct	758	₹31.25M
Online-App	698	₹30.46M
Online-Website	564	₹22.95M
Total	26841	₹989.25M

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sales_mode	Age Group	city	month_name	policy_id
All	All	All	All	All

Most Selling Policy ID

POL4321HEL

% of Total Sales : 16.52%

Revenue KPI

₹153.75M !

LM : 263.84M (-41.73%)

4/30/2023

Policy Sales KPI

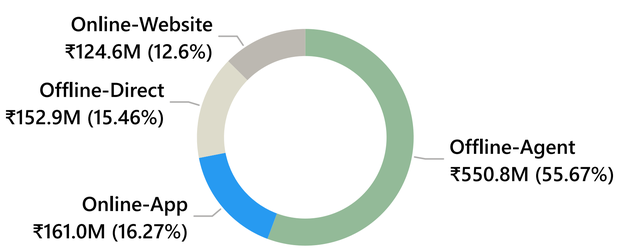
4.15K !

LM : 7.08K (-41.41%)

4/30/2023

Total Revenue	Policy Sales
989M	26.84K
Rev / Policy	**Avg. Settleme...**
36.86K	61.89%

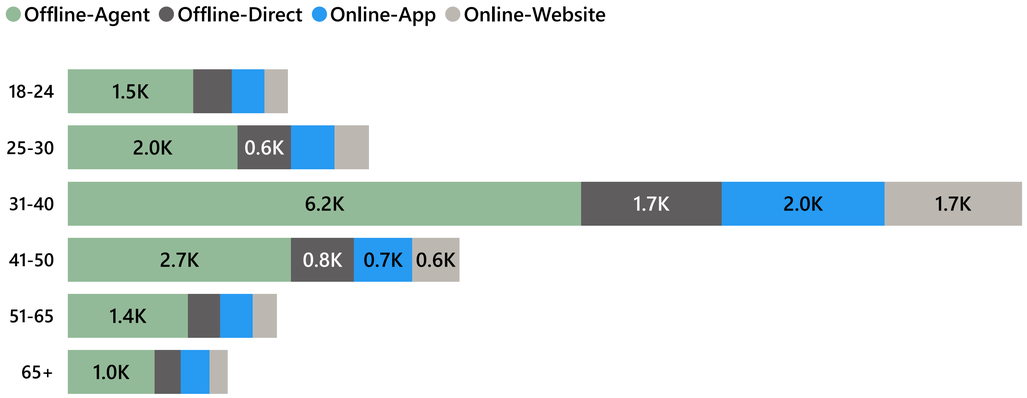
Sales Mode Contr. to Rev. & Policy Sales



Age Group | Time

Age Group | Policy Matrix

Mode of Sales by Age Group



Distribution of Policies sold by Age Group

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL4321HEL	1223	1172	1405	351	187	96	4434
POL3309HEL	315	555	2026	571	256	106	3829
POL4331HEL	551	679	1741	460	179	125	3735
POL5319HEL	134	347	1628	755	314	151	3329
POL6303HEL	131	281	1383	772	314	136	3017
POL6093HEL	111	223	1114	633	273	189	2543
POL9221HEL	83	147	921	511	406	250	2318
POL2005HEL	47	86	578	333	354	570	1968
POL1048HEL	45	127	659	313	228	296	1668
Total	2640	3617	11455	4699	2511	1919	26841