



SHIELD INSURANCE

Presented by - Ankit Kumar



GENERAL INFORMATION

The main objective of this project is to conduct a thorough analysis of the business, focusing on customer base, revenue generation, growth rates, policy changes, settlement and demographics. This aims to provide valuable insights for informed decision-making.

The Report is in 3 different parts :

- **General View:** Consolidated Report Summary
- **Sales View :** Contains Sales Performance
- **Age Segment :** Age - Wise Sales Performance



GENERAL INFORMATION

ABOUT COMPANY

Shield Insurance is renowned for offering comprehensive insurance solutions that safeguard individuals against life's unforeseen events. Their reputation for reliability is built on a steadfast commitment to delivering dependable coverage.



GENERAL INFORMATION

ABOUT COMPANY

Sales Mode

- ❖ Online – Website and App
- ❖ Offline – Agent and Direct

Shield Insurance provides a total of 9 policies in 5 different cities

- Delhi NCR
- Indore
- Mumbai
- Hyderabad
- Chennai



GENERAL INFORMATION

DATASET

1. Dim_customer
2. Dim_policies
3. Dim_date
4. Fact_premium
5. Fact_settlement

Data Timeline : From Nov 1st 2022 to Apr 31 2023.

A clear glass vase containing two eucalyptus branches with small, rounded green leaves, positioned on the left side of the image.

LET'S EXPLORE DASHBOARD





SHIELD INSURANCE

The main objective of building this dashboard is to conduct a thorough analysis of the business, focusing on customer base, revenue generation, growth rates policy changes, settlement and demographics. This aims to provide valuable insights for informed decision-making. This involves tracking key metrics and creating visual representations of daily trends over time. Filters are included for efficient analysis. based on various factors. This has separate pages for General Report, Sales-Mode and Age-Group will allow for in-depth understanding of their impact on the business.



GENERAL REPORT

This general page comprises all aspects of revenue and customer data. including demographic information, sales mode, age group. It also includes analysis daily revenue / customer growth trend analysis and helps to find the policy wit highest revenue and customers.



SALES MODE

This page is dedicated to various sales mode analyses for both customers and revenue. This page looks at how much money we are making and how many customers we have over a month. It also gives daily revenue for every sales mode.



AGE SEGMENT

This page focuses on various analysis related to the age groups of policy holders. It includes the number of policy holders in each policy, most preferred sales mode, policy wise revenue. Also, It helps finding average estimation for each group and identifies the customers with the highest estimated settlement.



GENERAL VIEW



Total Customer

3787✓

LM: (Blank)
(+Infinity%)
Nov_22

Total Revenue

131.7M✓

LM: (Blank)
(+Infinity%)
Nov_22

Daily Customer Growth

126.2✓

LM: (Blank) (+Infinity%)
Nov_22

Daily Revenue Growth

4.4M✓

LM: (Blank)
(+Infinity%)
Nov_22

Total Customer by Months

For Revenue

7K

6K

5K

4K

Nov_22

Dec_22

Jan_23

Feb_23

Mar_23

Apr_23

Customer & Revenue by City

city	Total Customer	Total Revenue
Chennai	2966	106.31M
Delhi NCR	11007	401.57M
Hyderabad	4340	160.52M
Indore	2096	81.35M
Mumbai	6432	239.51M
Total	26841	989.25M

Customer & Revenue by Age Group

age_group	Total Customer	Total Revenue
18-24	2239	30.74M
25-30	3407	61.50M
31-40	10977	335.72M
41-50	5357	210.60M
51-65	2792	156.92M
65 +	2069	193.77M
Total	26841	989.25M

Customer Segmentation

Age Group City	18-24		25-30		31-40		41-50		51-65		65 +	
	Customer	Revenue	Customer	Revenue	Customer	Revenue	Customer	Revenue	Customer	Revenue	Customer	Revenue
Chennai	254	3.6M	407	6.6M	1194	35.3M	600	23.4M	286	16.3M	225	21.2M
Delhi NCR	896	12.1M	1384	25.8M	4544	137.9M	2195	84.0M	1128	62.9M	860	78.9M
Hyderabad	378	4.4M	521	8.8M	1800	55.0M	891	36.4M	426	24.1M	324	31.7M
Indore	170	2.3M	271	5.3M	859	28.6M	398	15.6M	231	13.0M	167	16.6M
Mumbai	541	8.4M	824	15.1M	2580	79.0M	1273	51.1M	721	40.7M	493	45.3M
Total	2239	30.7M	3407	61.5M	10977	335.7M	5357	210.6M	2792	156.9M	2069	193.8M



SALES VIEW



Total Customer

27K

Total Revenue

989M

Total Offline Sales

704M

Total Online Sales

286M

Total Customers by Sales mode

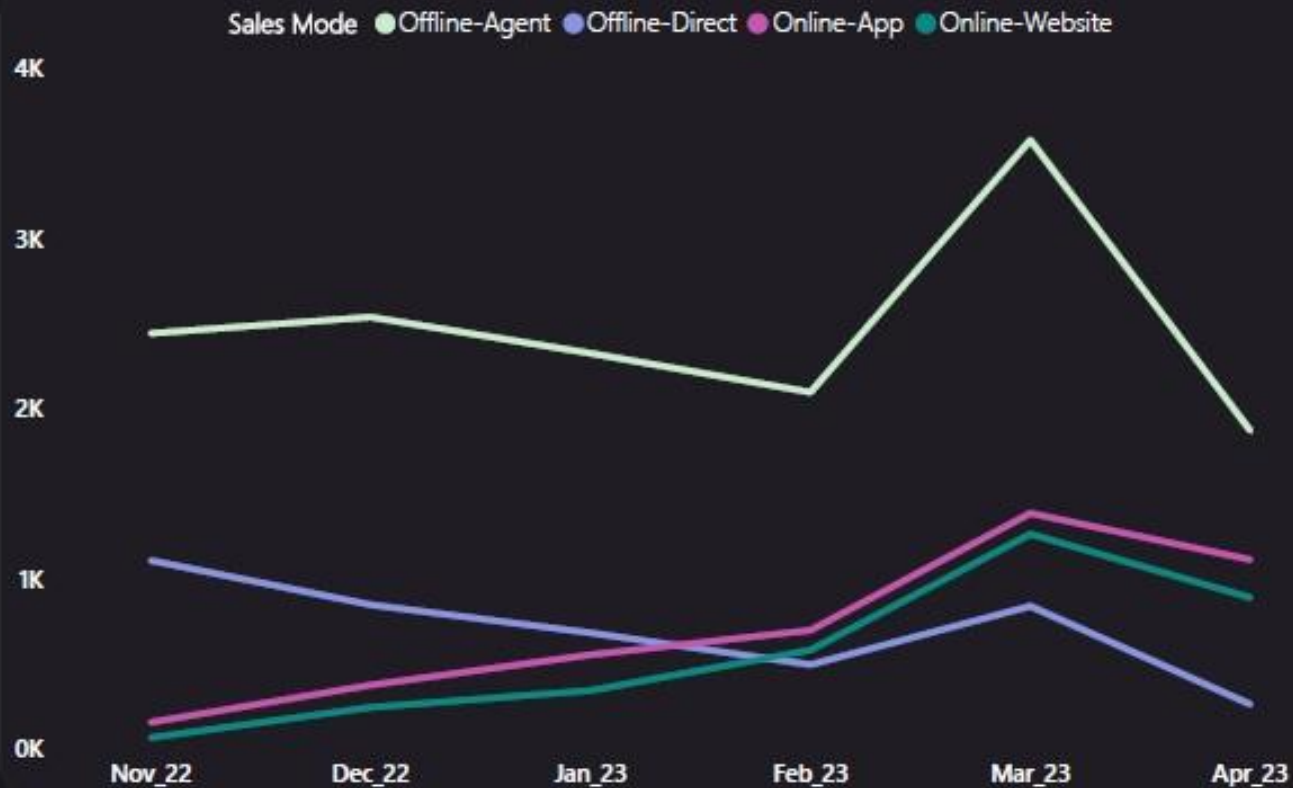
Offline-Agent 14.9K

Online-App 4.3K

Offline-Direct 4.3K

Online-Website 3.4K

Customers by Months & Sales mode



Total Revenue by Sales mode

Offline-Agent 551M

Online-App 161M

Offline-Direct 153M

Online-Website 125M





AGE VIEW



Total Customer

27K

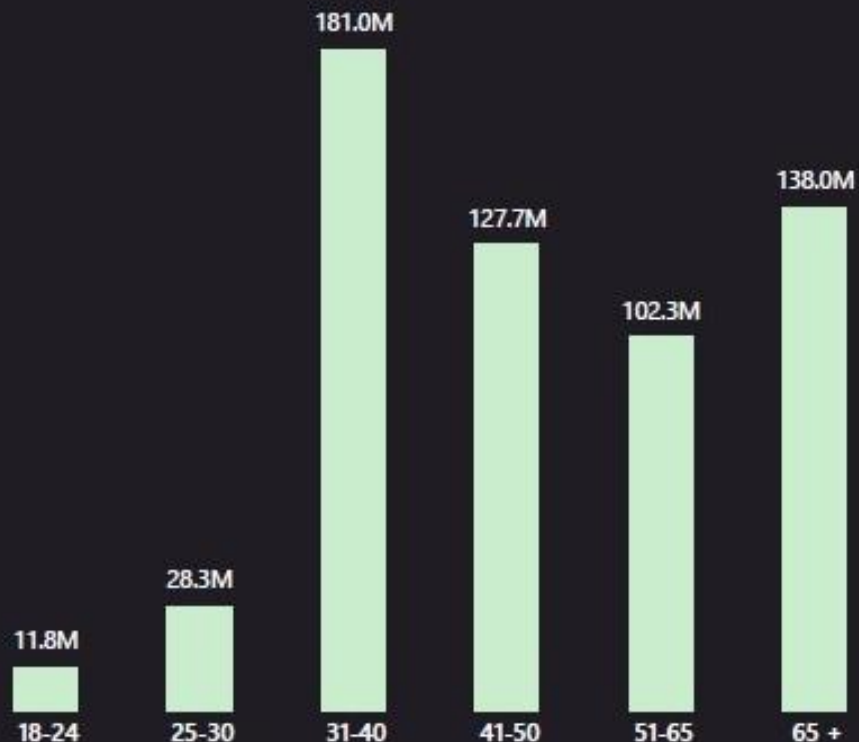
Offline Customers

19.1K

Online Customers

7712

Age Group Vs Expected Settlement amt (INR)



Customers Age Group Vs Sales Mode

Sales Mode	18-24	25-30	31-40	41-50	51-65	65 +	Total
Offline-Agent	1283	1921	5914	3019	1596	1140	14873
Offline-Direct	393	612	1635	842	439	335	4256
Online-App	323	493	1868	817	430	371	4302
Online-Website	240	381	1560	679	327	223	3410
Total	2239	3407	10977	5357	2792	2069	26841

Customers Age Group Vs Policy Preference

Policies	18-24	25-30	31-40	41-50	51-65	65 +	Total
POL1048HEL	40	111	629	340	244	304	1668
POL2005HEL	39	83	545	351	358	592	1968
POL3309HEL	276	490	1945	707	287	124	3829
POL4321HEL	1044	1175	1449	453	209	104	4434
POL4331HEL	455	661	1686	592	207	134	3735
POL5319HEL	109	318	1511	862	361	168	3329
POL6093HEL	95	197	1051	670	326	204	2543
POL6303HEL	110	249	1297	824	381	156	3017
POL9221HEL	71	123	864	558	419	283	2318
Total	2239	3407	10977	5357	2792	2069	26841

GENERAL FINDINGS

KPI's

- Total Revenue : 989.25 M
- Total Customers : 26841
- Daily Average Customer Growth : 148(Approx)

Date & Months :

- Date with Highest Revenue(16.79 M) and Highest Customers(418) acquired is: **25 March 2023**
- Date with Lowest Revenue(2.05 M) and Customers (71) acquired is: **17 Nov 2022.**
- Month with Highest Revenue(264 M) and Highest Customers(7081) acquired is: **March 2023**
- Month with lowest Revenue(131.7 M) and lowest Customers(3787) acquired is: **Nov 2022**



GENERAL FINDINGS



KPI's

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March is the busiest month in the company, most people buy policies in the month of March to qualify for the Tax Exemption as March is the last month of Indian Financial Year.

GENERAL FINDINGS

City

- City which Acquired Highest Total Revenue and acquired highest number of customers: **Delhi NCR**
- City which acquired lowest Total Revenue and acquired lowest number of customers: **Indore**

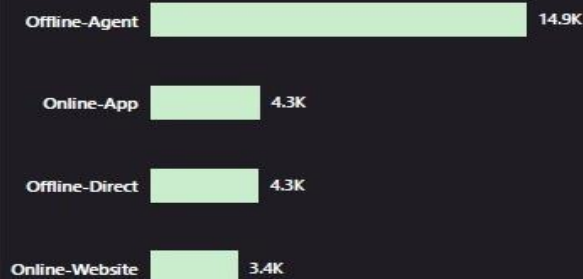
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Sales Mode :

- Most preferred sales mode by Customers(55%): **Offline-Agent**
- Least preferred sales mode(12%) : **Online-Website**

Total Customers by Sales mode



GENERAL FINDINGS

Age Segment :

- Age Segment with highest Revenue and customer acquisition is: **31-40**
- Age Segment with lowest Revenue acquisition is: **18-24**
- Age Segment with lowest Customer acquisition is: **65+**
- 18-24 segment receives highest Revenue (7.5 M) in the month of Jan whereas all other age segment gained their peak in March.

Customer & Revenue by Age Group

age_group	Total Customer	Total Revenue
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GENERAL FINDINGS

Policy Preference :

- Policy with highest Revenue Acquisition (324M): **POL2005HEL**
- Policy with highest Customer Acquisition (4434): **POL4321HEL**

Customers Age Group Vs Policy Preference

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INSIGHTS

Why old people buy costly policies ?

The data suggests that old people buy policies with costly premiums. Like, 577 senior citizens, which is a predominant headcount, buy **POL2005HEL** with premium of 120K. It's because in old age most of the people came up with pre-existing diseases and are more likely to require frequent medical care, insurance companies usually charge a higher premium to cover them.

So, it's quite normal to say that most of the people don't even buy the policies. To answer this problem, company can *analyze health risks in the 65+ age group and adjust premiums accordingly to accurately reflect potential claims costs.*

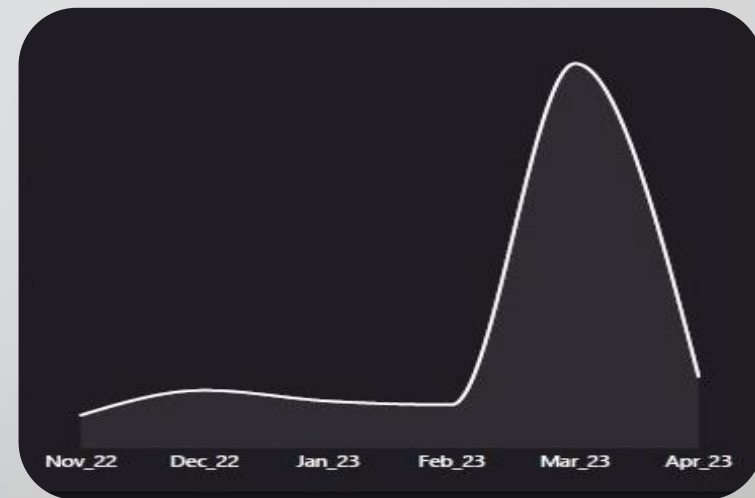
INSIGHTS

Why march is the busiest month ?

March is crucial in India's financial calendar, particularly for insurance purchases, driven by tax-saving motives. As the fiscal year ends, individuals rush to optimize tax liabilities, favoring insurance policies for their tax benefits. Strategic purchases, aided by tailored offerings and promotions, dominate this period. Additionally, the need for year-end tax declarations accelerates policy acquisitions. In essence, March represents a vital window for insurance investments in India.

An insurance company can capitalize on other months also by:

1. Offering tax-saving insurance products.
2. Providing incentives for March purchases.
3. Training agents on tax-saving policies.
4. Utilizing digital channels for promotions.
5. Streamlining processes for efficiency.





THANK YOU

Do you have any questions ?
Feel free to ask anything....

Presented by : **Ankit Kumar**