

# Let's Explore Dashboard





# Shield Insurance Project



HOME



GENERAL VIEW

To get an overview of all the crucial metrics such as KPIs , revenue, performance and customer segmentation.



SALES MODE ANALYSIS

Analysis of the sales mode that highlights the effectiveness in generating revenue and the customer base.



AGE GROUP ANALYSIS

Analysis on the basis of the age-group to extract insights about annual settlements, customer trend, preferred policies and sales modes.

## General View

Data Is Not Available for Selected Filter

Monthly Customers Growth

3787✓

LM: (Blank) (+Infinity%)

Monthly Revenue Growth

131.69M✓

LM: (Blank) (+Infinity%)

Daily Customers Growth

340✓

LD: 225 (+51.11%)

Daily Revenue Growth

13.21M✓

LD: 8.04M (+64.39%)

### Customer Segment

city	AgeGroup	Total Customer	Total Revenue
Delhi NCR	31-40	4741	146.49M
Mumbai	31-40	2703	84.62M
Delhi NCR	41-50	1899	77.61M
Delhi NCR	65+	801	75.29M
Delhi NCR	51-65	1030	59.98M
Hyderabad	31-40	1886	58.09M
Mumbai	41-50	1130	47.60M
Mumbai	65+	457	43.52M
Mumbai	51-65	632	37.60M
Chennai	31-40	1236	36.98M
Hyderabad	41-50	765	33.46M
Total		26841	989.25M

date

All

city

All

AgeGroup

All

policy\_id

All

sales\_mode

All

Nov-22

Dec-22

Jan-23

Feb-23

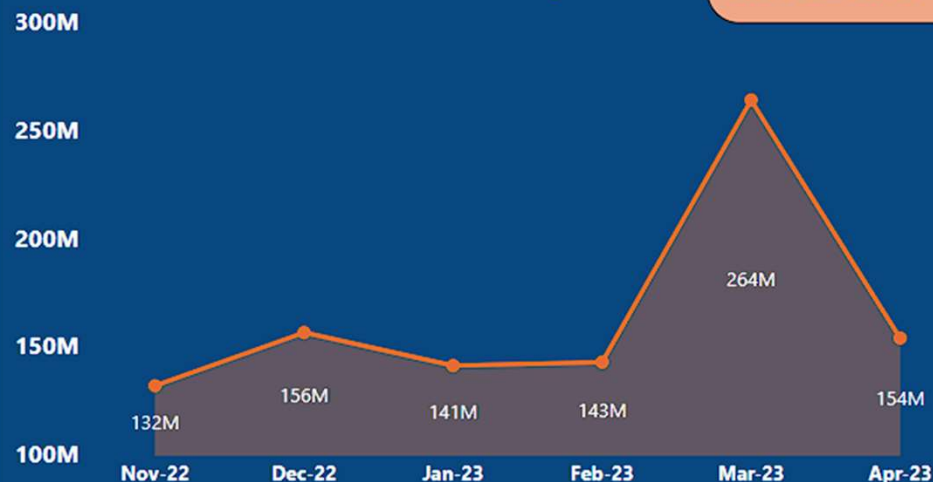
Mar-23

Apr-23

Clear all slicers

### Revenue Trend By Month

Show Customer



### City Wise Split

city	Customers	Revenue
Delhi NCR	11.007K	401.57M
Mumbai	6.432K	239.51M
Hyderabad	4.34K	160.52M
Chennai	2.966K	106.31M
Indore	2.096K	81.35M

### Age-Group Wise Split

AgeGroup	Customers	Revenue
31-40	11.455K	356.03M
41-50	4.699K	196.02M
65+	1.919K	184.89M
51-65	2.511K	148.41M
25-30	3.617K	67.71M
18-24	2.64K	36.19M

LM- Last Month LD- Last Day

# Sales Mode Analysis

Clear all slicers

Nov-22 Dec-22 Jan-23 Feb-23 Mar-23 Apr-23

city

All

policy\_id

All

AgeGroup

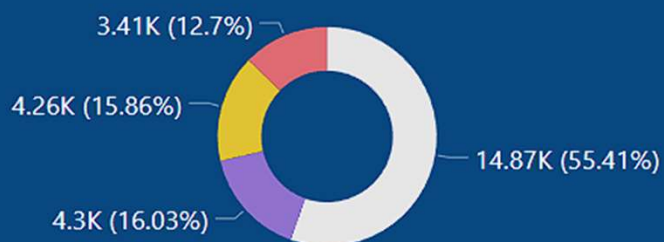
All

sales\_mode

All

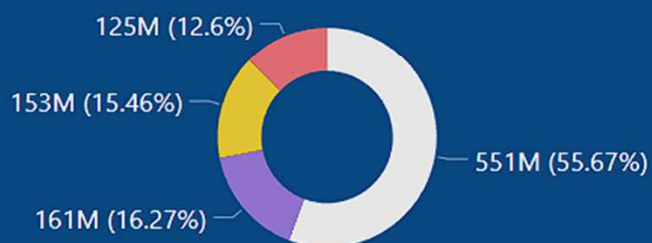
## Total Customers By Sales Mode

Offline-Agent Online-App Offline-Direct Online-Website



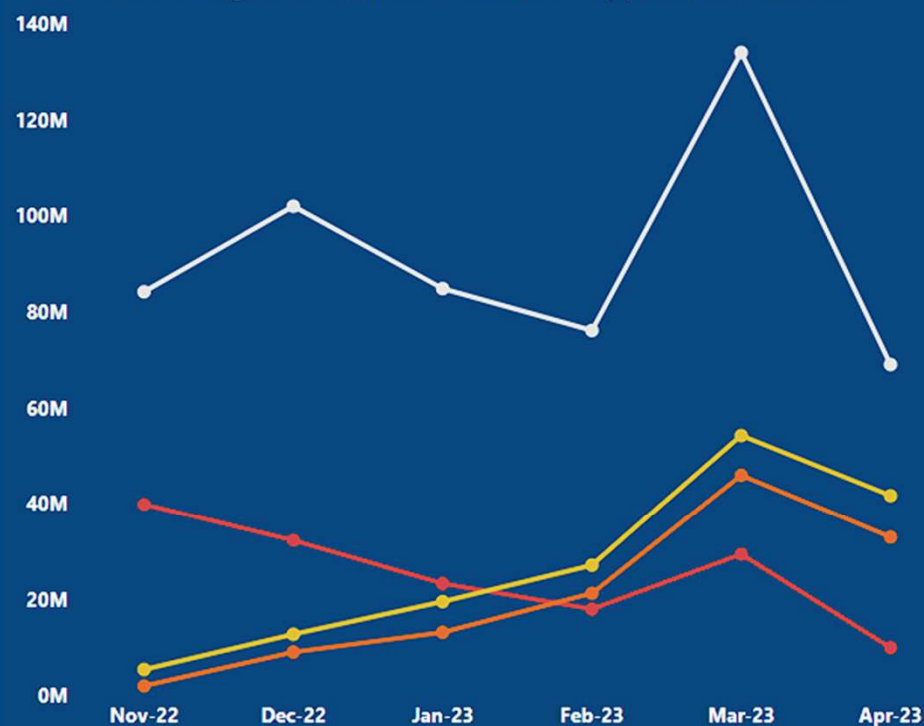
## Total Revenue By Sales Mode

Offline-Agent Online-App Offline-Direct Online-Website



## Sales Mode Trend By Month

Offline-Agent Offline-Direct Online-App Online-Website





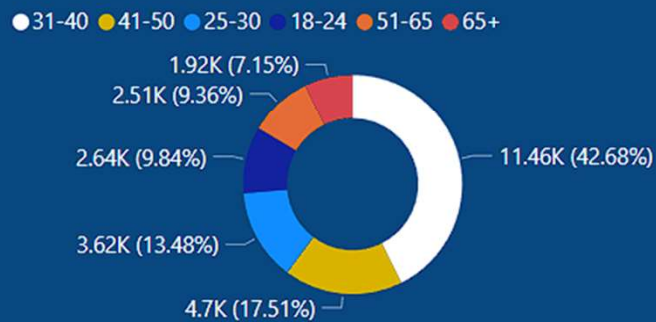
# Age Group Analysis

Nov-22 Dec-22 Jan-23 Feb-23 Mar-23 Apr-23

## Age Group vs Policy Preference

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
<b>Total</b>	<b>2640</b>	<b>3617</b>	<b>11455</b>	<b>4699</b>	<b>2511</b>	<b>1919</b>	<b>26841</b>

## Age Group vs Sales Mode



city

All

policy\_id

All

AgeGroup

All

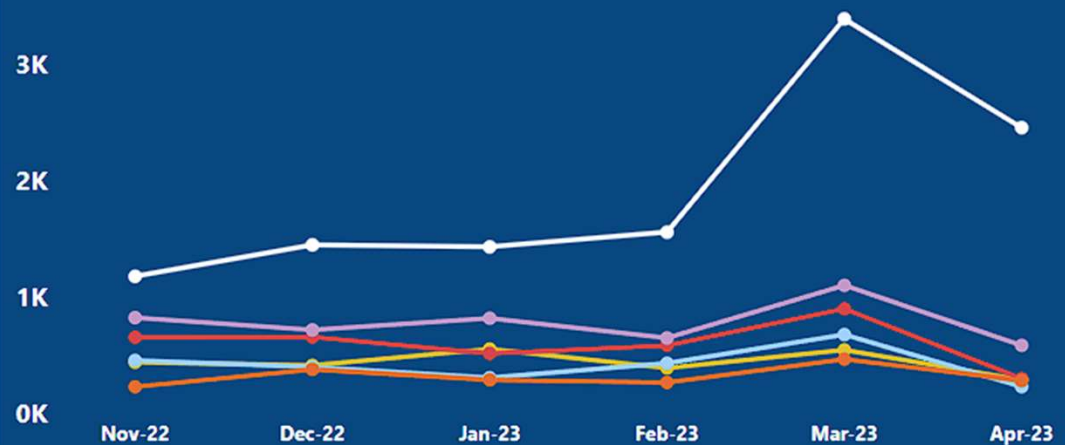
sales\_mode

All

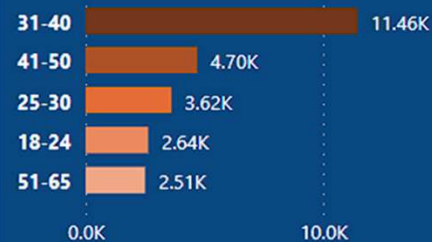
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## Customers Trend By Age Group

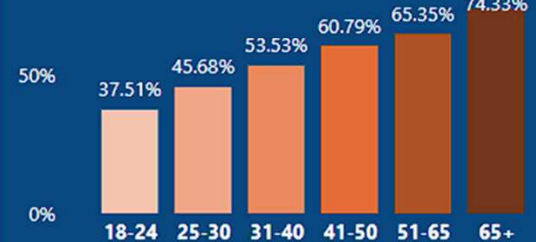
18-24 25-30 31-40 41-50 51-65 65+



## Total Customers By Age Group



## Age Group vs Expected Settlement %



# Insights

- 1.March 2023 Performance Peak:** Witnessed the highest revenue and customer acquisition.
- 2.Delhi NCR Dominance:** Led in revenue and customer acquisition among all cities.
- 3.Key Age Group Contribution:** The 31-40 age group significantly contributed to both revenue and customer base
- 4..
- 5.Sales Mode Impact:** Offline-Agent sales mode attracted the most customers and generated the highest revenue.
- 6.Online Sales Dynamics:** Online App and Website showed revenue growth from Feb 2023, while Offline-Direct declined.
- 7.Popular Policy:** Policy 'POL4321HEL' with a base premium of ₹5,000/- gathered a customer base exceeding 4000.
- 8.Age Group Preference:** The 31-40 age group appeared as the prominent customer base across all policies.