



Shield Insurance Analytics

Documentation for Power BI Report

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Objective :

The goal is to support Shield Insurance by providing them with a user-friendly dashboard filled with valuable business insights, helping them make informed decisions based on data.

Assignment :

As a Data Analyst Intern, my responsibility involves engaging with the client, analyzing the data, constructing a customized dashboard to meet their specific requirements and derive insights from it

Objective and Scope of the Report

This document will offer guidance or a demonstration on the Shield Insurance analytics and how to utilize Power BI functionalities to examine various parameters within the report.

- ➔ City
- ➔ Age Group
- ➔ Sales Mode
- ➔ Policy Type
- ➔ Growth Over Month

Data Sources Used For This Report

The CSV files below, containing data on the company's customers and services from November 2022 to April 2023, utilized as the data sources for this presentation.

Three Dimension Table

- dim_customer.csv - *This table provides information about the customer.*
- dim_date.csv - *This table provides the dates at daily, monthly levels and week numbers of the year.*
- dim_policies.csv - *This table provides all policies data.*

Two Fact Table

- fact_premiums.csv - *This table provides comprehensive details on policy orders.*
- fact_settlements.csv - *This table contains information about policy settlement.*

Description of The Report Layout

Home Page

This page serves as the entry point for accessing the Power BI report, allowing you to navigate to other specific pages.

General view

This page offers details on KPIs, monthly trends in revenue growth and customer expansion, as well as other essential metrics.

Sales Mode Analysis

This page displays visual data on key metrics categorized by various sales modes.

Age Group Analysis

This report page presents visual data on customer key metrics categorized by distinct age groups and estimated settlement amount.

Key Insights

- ➔ March stood out as the leading month, recording the highest revenue of 263.84M.
- ➔ Delhi NCR showcased superiority in both customer numbers and revenue generation.
- ➔ A notable increase of individuals aged 31-40 (11k) joined the platform, indicating a potential target audience in other cities.
- ➔ Offline agents significantly contributed to revenue, outperforming other category
- ➔ Trends showed a modest rise in both customers and revenue for the online app and website, whereas offline direct sales saw a decrease.
- ➔ Policy ID POL4321HEL showed remarkable performance by attracting over 4,000 customers.
- ➔ The 31-40 age group received higher settlement amounts, totaling a remarkable 547 million.

Thank you

For your time and engagement with the Shield Insurance Analysis Report