



Home or Summary
Dashboard >

Policy Analysis
Dashboard

Risk Assessment
Dashboard

Sales and Revenue
Dashboard

Customer Engagement
Dashboard

Claims Efficiency
Dashboard

Report Developed by
Eswar Magam

Kevin Insurance Company Policy History

Historical Data on the Insurance Policies from 2020 to 2023

→ Next

Claims Efficiency

56.42%

Approved Claims
Count

479

Policies
Up for Renewal

401

Renewed

Policies Renewed by customers

206

Policy Holders



849

Approved Claim Value



5M

Monthly Premium



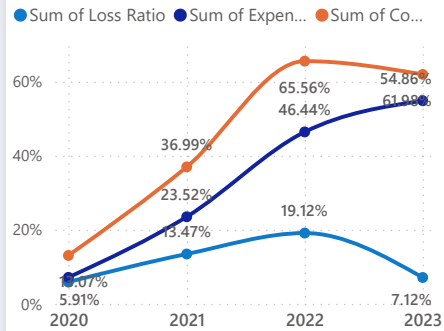
878K

Avg Monthly Premium



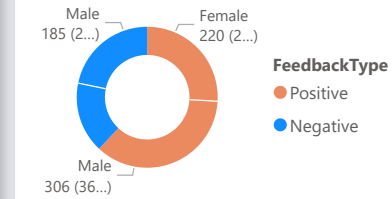
1.03K

Loss Ratio, Expense Ratio, Combined Ratio



Customer satisfaction

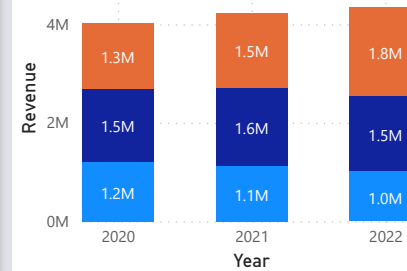
By Gender



Revenue Generated

by year

SalesChannel: ● Agent ● Online ● Phone





Policy Holders



849

Approved Claim Value



5M

Monthly Premium



878K

Avg Monthly Premium Per user



1.03K



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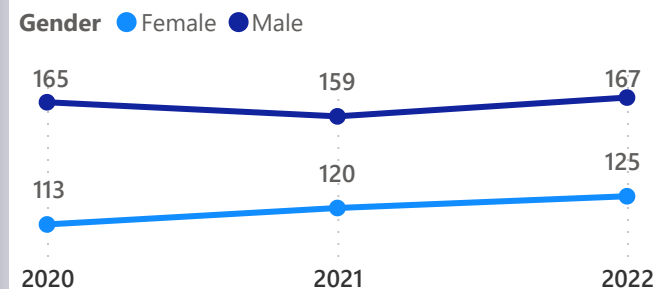
Policy Holders

By Gender

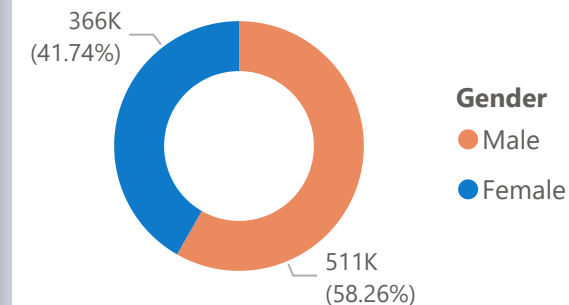


Policy Holders

By Year and Gender



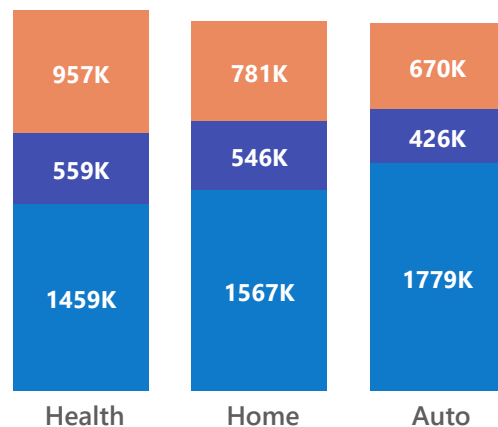
Monthly Premium by Gender



Claims

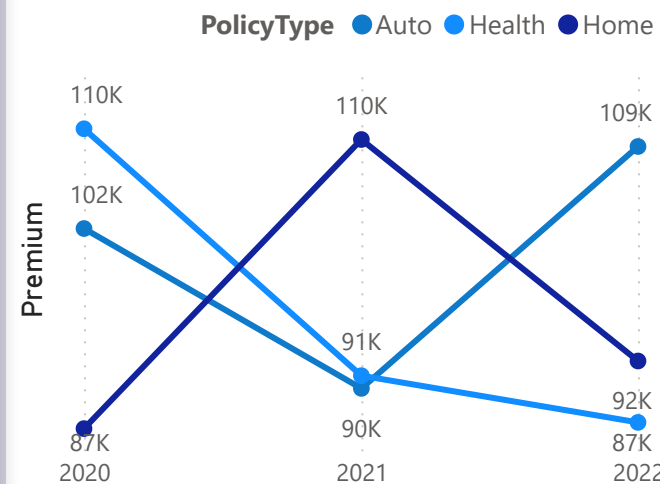
By Policy Type

ClaimStat... ● Approved ● Denied ● Pending



Premium Distribution

By Policy Type and trends over time



Customer Demographics





Select Year

All

Policy Analysis Dashboard

Risk Assessment Dashboard >

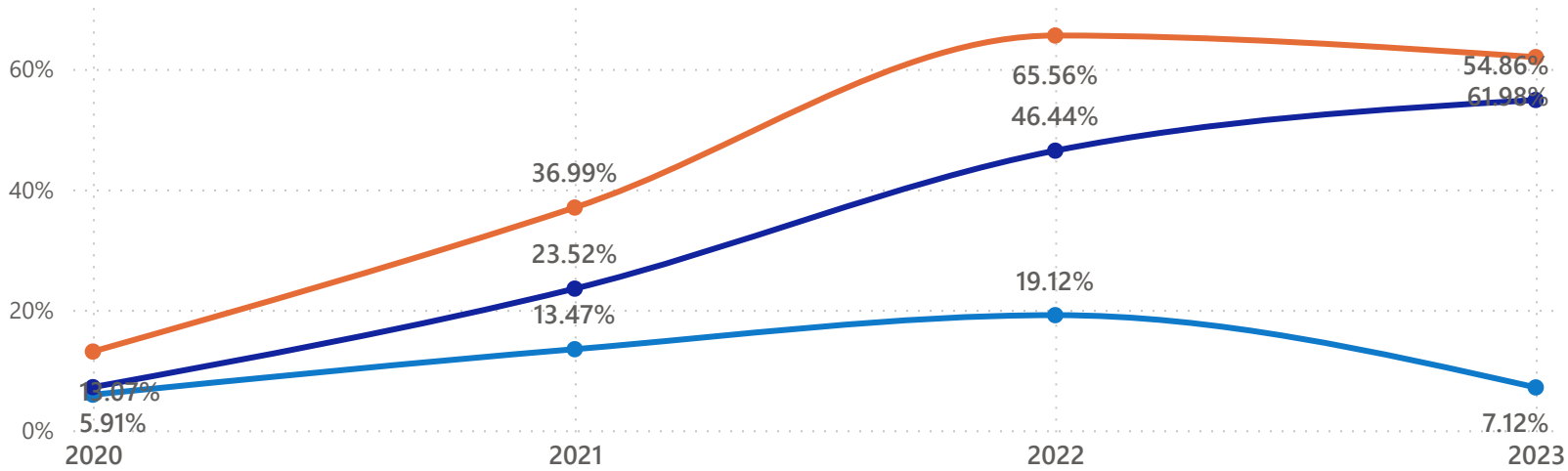
Sales and Revenue Dashboard

Customer Engagement Dashboard

Claims Efficiency Dashboard

Loss Ratio, Expense Ratio, Combined Ratio

Sum of Loss Ratio Sum of Expense Ratio Sum of Combined Ratio



Back

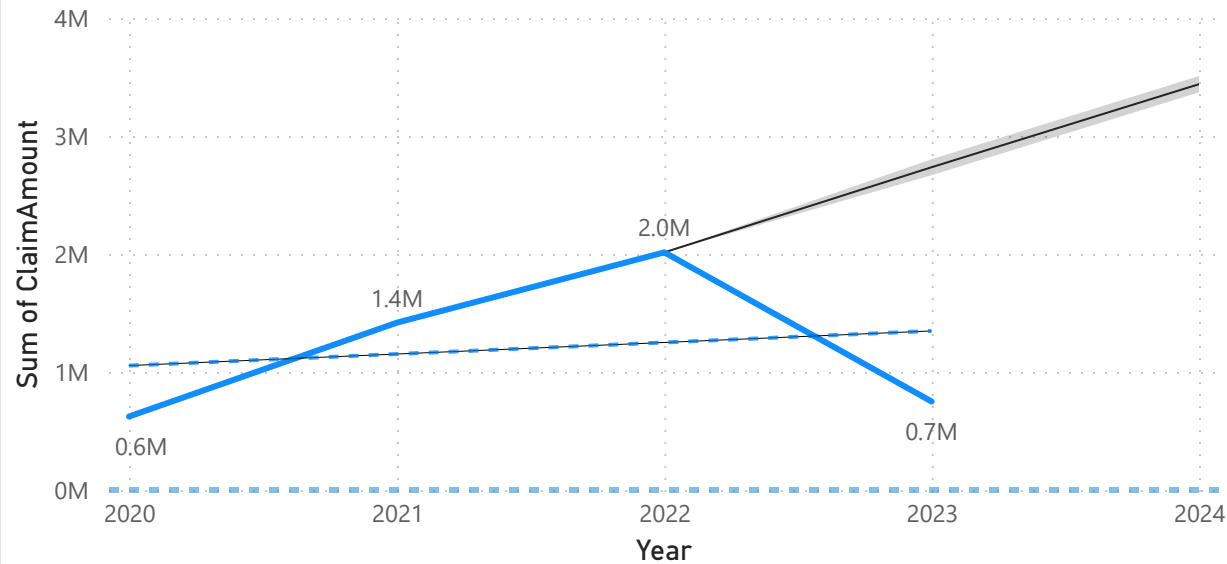
Next

Loss Ratio
Of Approved Claims
45.6%

Expense Ratio
Of Approved Claims
54.9%

Claim Trend and Forecast

Ignore the last Data point



Claims Risk Assessment Matrix

PolicyType	Approved	Denied	Pending
Auto	183	40	60
Health	142	56	85
Home	154	56	73
Total	479	152	218



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Click Here

Renewal Details

Sales Performance

Of Policies

Sales Details

Reset Slicer

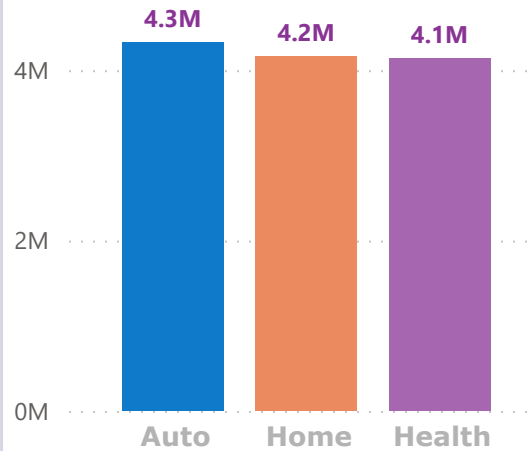
Bookmark

Select Year, Quarter, Month, Day

All

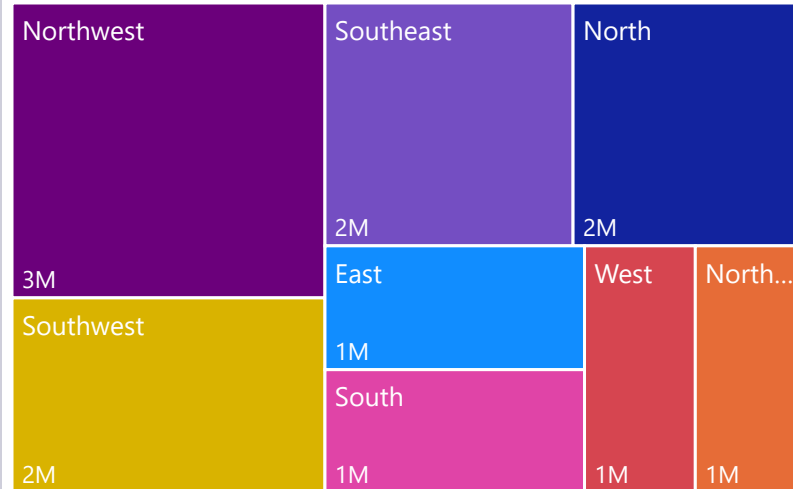
Revenue Generated

By Policy Type



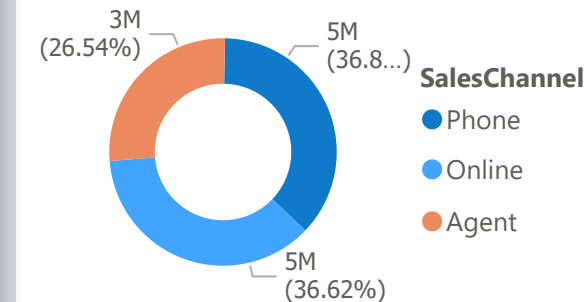
Policy Sales

By Sales Region



Sales

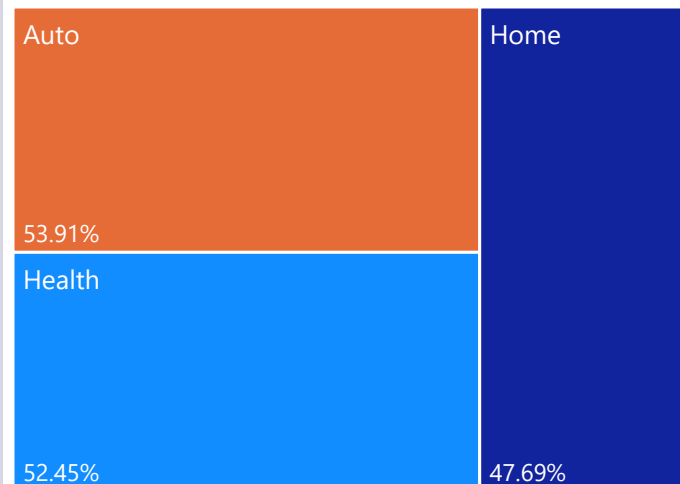
By Sales channel Type



Retention Analysis

Of Policies

Customers RenewalRate by
PolicyType



Overall Renewal
Rate

51.4%

Policies

Up for Renewal

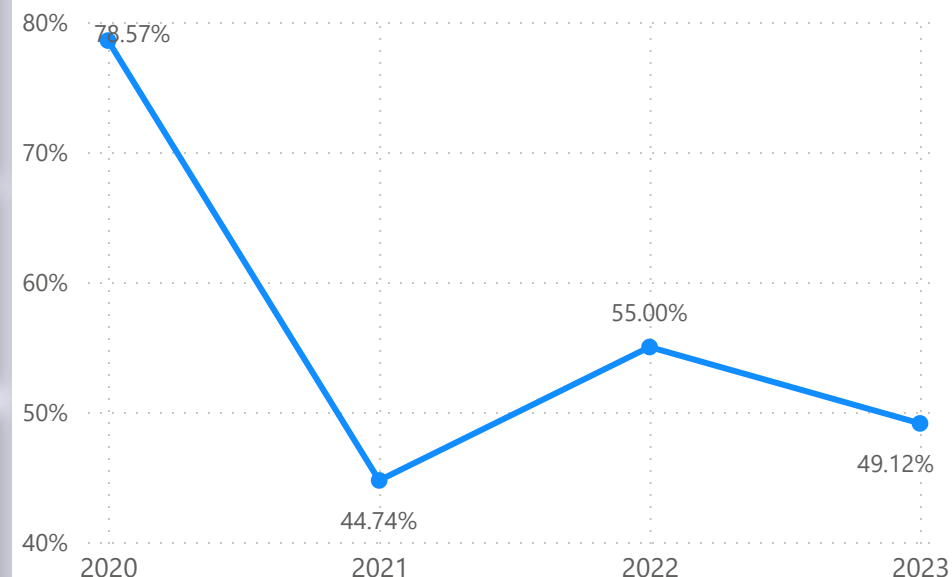
401

Renewed

Policies Renewed by customers

206

Policies RenewalRate by Year





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Customer Feedback & Segmentation

Reset Slicer

Bookmark

Select Year, Quarter, Month, Day

All

Customer Feedback

By Feedback Type and Policy Type

FeedbackType ● Positive ● Negative



Positive Feedbacks

526

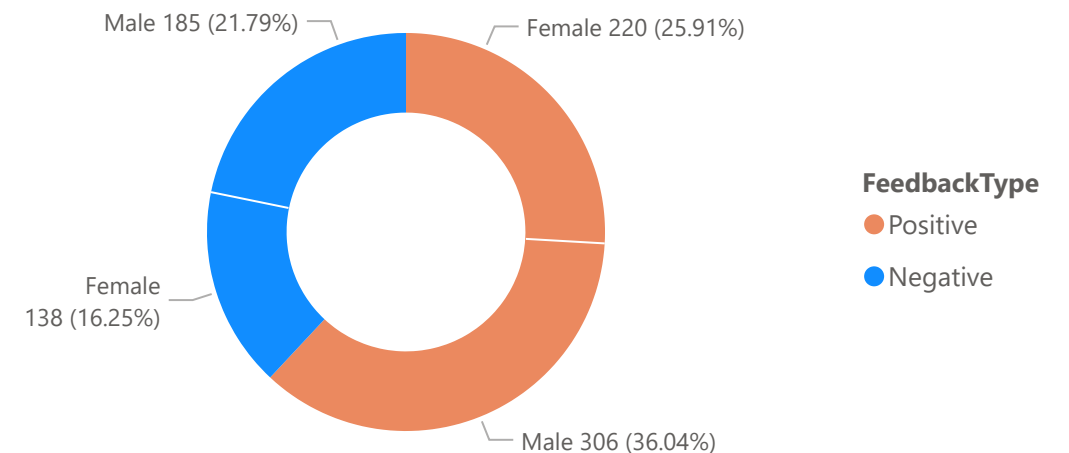
Negative Feedbacks

323

Need to focus on the Policies or the services we are providing, Male customer seems to be satisfied with the Policies they bought.

Customer satisfaction

By Gender





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Claim Details

of the insurance policies

Count of ClaimID	ClaimStatus	ClaimType	Sum of ClaimAmount
7	Approved	AutoAccident	56853
135	Approved	HealthIssue	1401989
142			1458842

Year, Quarter, Month

All

Claims

By Policy Type

ClaimStatus ● Approved



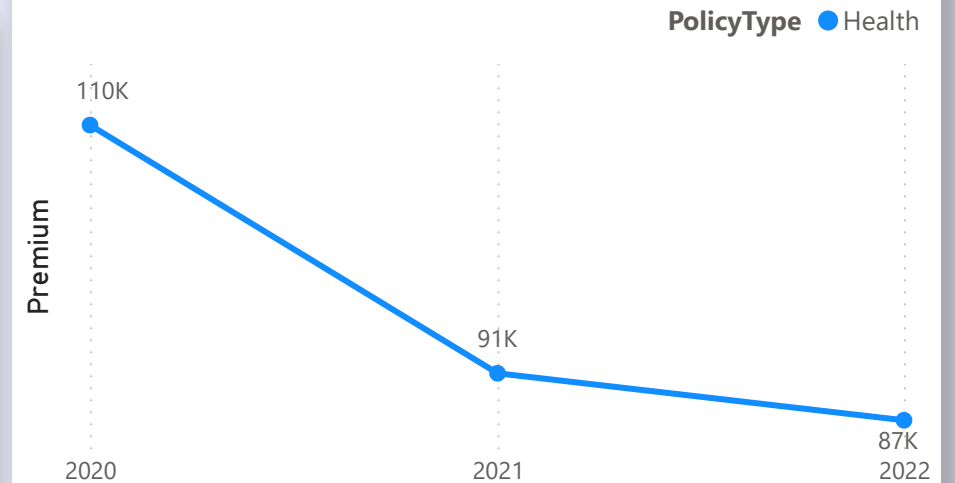
Policy, Premium Details

of the insurance policies

PolicyID	PolicyHolderID	FullName	Sum of PremiumAmount	PolicyType
3	103	Orlando Gee	386	Health
6	106	Janet Gates	791	Health
9	109	Dominic Gash	1403	Health
12	112	Johnny Caprio	1780	Health
15	115	John Beaver	1560	Health
18	118	Linda Burnett	188	Health
21	121	Donald Blanton	1180	Health
24	124	Todd Logan	585	Health
27	127	Betty Haines	1339	Health
30	130	Edith	1780	Health
Total			288308	

Premium Distribution

By Policy Type and trends over time



Claim Efficiency Details

of the insurance policies



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Claims Efficiency
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Approved Claims
Count

479

Total Claims
Count

849

Average Claim Process
time
per Policy (in days)

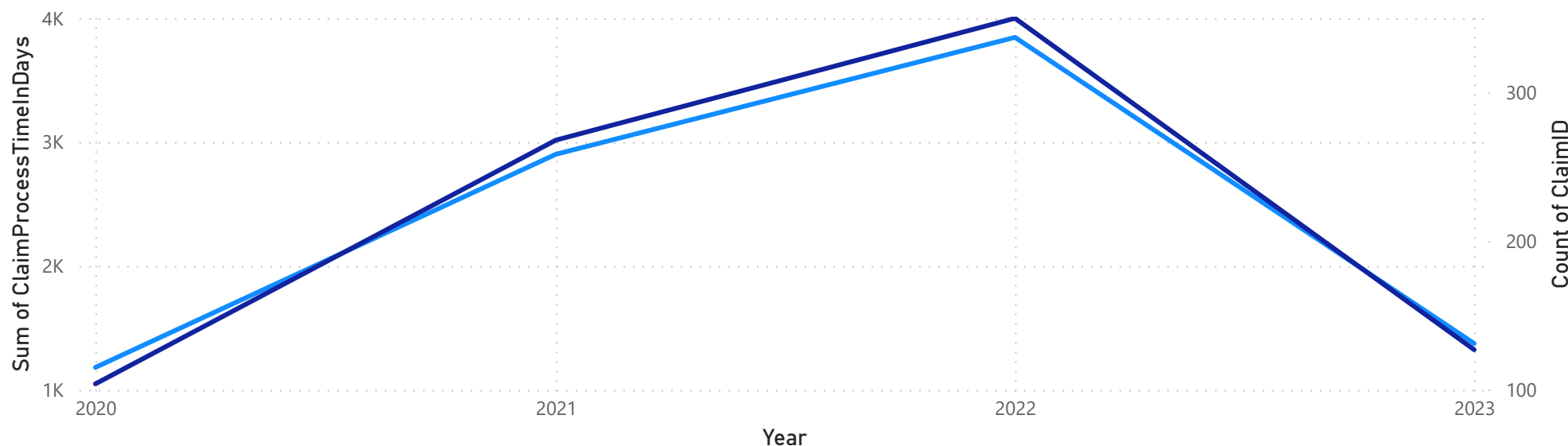
1094

Claims Efficiency

56.42%

Claim Process Time and Number of Claims

● Sum of ClaimProcessTimeInDays ● Count of ClaimID





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Claims Efficiency Dashboard

Policy Renewal Details

by Policy type

IsRenewed

1

PolicyID	PolicyType	PolicyHolderID	FullName	Gender	IsRenewed(1 means Yes)
7	Auto	107	Lucy Harrington	Male	1
61	Auto	161	Prashanth Desai	Male	1
79	Auto	179	Pat Coleman	Male	1
88	Auto	188	Derek Graham	Male	1
91	Auto	191	Jon Grande	Male	1
121	Auto	221	Frank Campbell	Male	1
136	Auto	236	Robert Jones	Male	1
202	Auto	302	Thomas Armstrong	Male	1
223	Auto	323	Ranjit Varkey Chudukatil	Male	1
292	Auto	392	Jon Ganio	Male	1
322	Auto	422	Kelly Focht	Female	1
337	Auto	437	David Givens	Male	1
340	Auto	440	Jeanie Glenn	Female	1
370	Auto	470	Joshua Huff	Male	1
382	Auto	482	Raul Casts	Male	1
388	Auto	488	Alice Steiner	Female	1
391	Auto	491	Liza Marie Stevens	Female	1
397	Auto	497	Phyllis Huntsman	Female	1
430	Auto	530	Reuben D'sa	Male	1
442	Auto	542	Linda Ecoffey	Female	1
454	Auto	554	Michelle Alexander	Female	1
478	Auto	578	Christopher Beck	Male	1
484	Auto	584	John B	Male	1
Total					122

Renewed

Policies by customers

122

Not Renewed

Policies by customers

358

Year, Quarter, Month

2020

Qtr 1

Qtr 2

Qtr 3

Qtr 4

2021

Qtr 1

Qtr 2

Qtr 3

Qtr 4

2022

2023



Policy Analysis Dashboard

Risk Assessment Dashboard

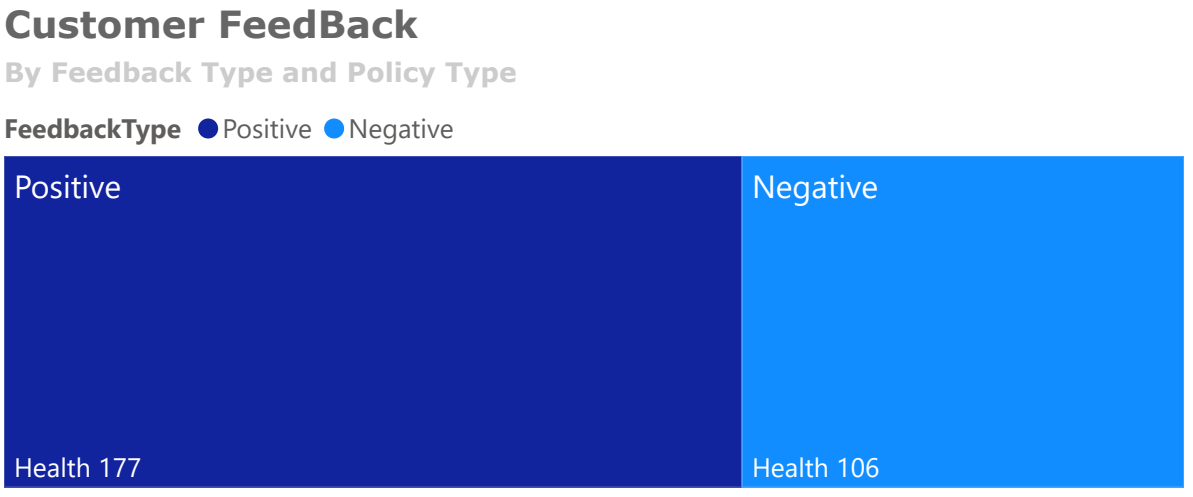
Sales and Revenue Dashboard

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Customer Feedback Details

by Feedback type and Policy type



Need to focus on the customer feedback as there is almost 50% negative feedback on the Products.

Customer Feedback			
FeedbackType	PolicyType	Count of FeedbackID	FeedbackText
Negative	Health	8	Claim approved but the policy has co-pay mentioned in it.
Negative	Health	24	Claim not approved
Negative	Health	26	Claim process took too long
Negative	Health	27	Not a good one
Negative	Health	21	Not recommend this policy
Positive	Health	29	Claim approved same day
Positive	Health	63	Excellent service
Positive	Health	28	Excellent service and quick claim payout
Positive	Health	29	Good policy
Positive	Health	28	Make the terms and conditions more clear
Total		283	

Customer Feedback		
FeedbackType	PolicyType	Count of FeedbackID
Negative	Health	106
Positive	Health	177
Total		283



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Sales Details
of the insurance policies

Select Gender

Female

Male

Year, Quarter, Month

2020

SalesRegion

Multiple selections

SalesChannel

Online

PolicyType

Multiple selections

SalesID	PolicyHolderID	FullName	Gender	SalesChannel	SalesRegion	PolicyType	SalesAmount
15	115	John Beaver	Male	Online	Southeast	Health	11852
61	161	Prashanth Desai	Male	Online	Northwest	Auto	18807
81	181	Joseph Lique	Male	Online	Northwest	Health	9146
87	187	Michael Graff	Male	Online	Northwest	Health	5472
92	192	Ted Bremer	Male	Online	Northeast	Home	4780
101	201	Lester Bowman	Male	Online	Southeast	Home	20757
116	216	Stanley Alan	Male	Online	Northwest	Home	5447
142	242	Robert Brown	Male	Online	Northwest	Auto	18574
178	278	Guy Gilbert	Male	Online	Northwest	Auto	26664
230	330	Joe Kim	Male	Online	Northwest	Home	19753
248	348	Scott Cooper	Male	Online	Northeast	Home	25172
259	359	Peter Houston	Male	Online	Northwest	Auto	2381
263	363	Eddie Holmes	Male	Online	Northwest	Home	22853
376	476	Pat Chambers	Male	Online	Northwest	Auto	9495
400	500	Lawrence Hurkett	Male	Online	Southeast	Auto	13350
413	513	Walter Mays	Male	Online	Southeast	Home	25352
457	557	Cecil Allison	Male	Online	Southeast	Auto	21115
477	577	John Beaver	Male	Online	Northwest	Health	21109
497	597	Eli Bowen	Male	Online	Northwest	Home	23372
510	610	Eric Brumfield	Male	Online	Northwest	Health	23421
545	645	Forrest Chandler	Male	Online	Northwest	Home	17188
607	707	Garth Fort	Male	Online	Northwest	Auto	9633
653	753	John Hanson	Male	Online	Northwest	Home	21597
659	759	Ronald Heymsfield	Male	Online	Northwest	Home	7930
662	762	Matthew Hink	Male	Online	Northwest	Home	4629
703	803	Victor Kelley	Male	Online	Northeast	Auto	26264
714	814	Anton Kirilov	Male	Online	Northwest	Health	7018
Total							492084

Sum of Sales

By Policy Type

