



Shield Insurance

Shield Insurance has been helping individuals and businesses protect what matters most.

Our idea is simple: **make insurance easy, honest, and affordable.**

We offer a wide range of plans — from **health and motor to home and life** — all designed to give you peace of mind.

Objective

- To provide a detailed overview of Shield Insurance's performance.
- To analyze revenue trends, customer demographics, and sales modes.
- To help identify key contributing factors and areas for improvement.

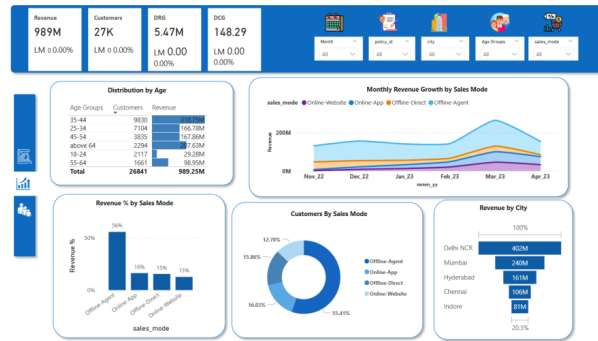


Dashboard Overview



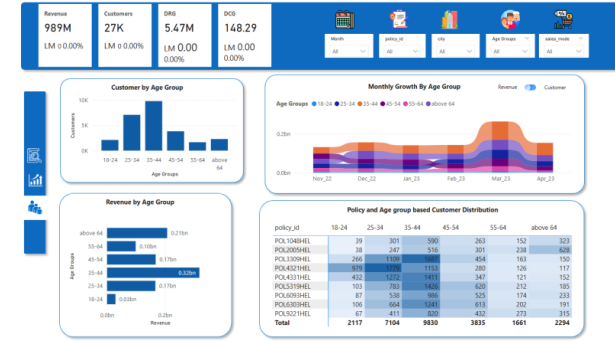
General View

This dashboard gives a high-level overview of **total revenue, customer count, and growth trends**. It allows filtering by **month, policy, city, and age group** to explore the data in more depth. The dashboard also highlights key performing customer segments and cities.



Sales View

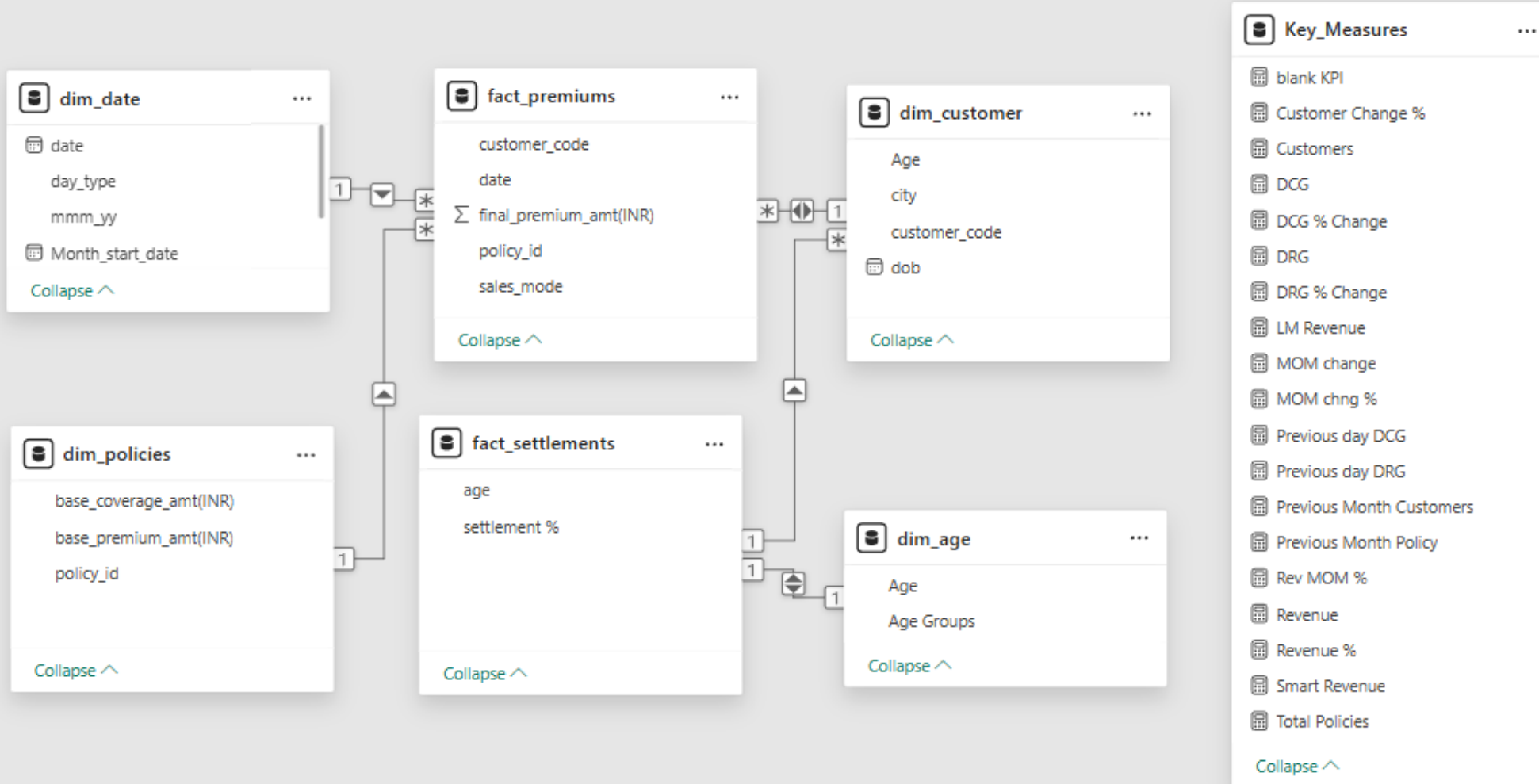
This dashboard compares **revenue** and **customer** distribution across different sales modes. It features visual comparisons and a **monthly trend** analysis to observe how different channels are performing over time. **Regional performance** is also shown for additional business insights.



Age Group View

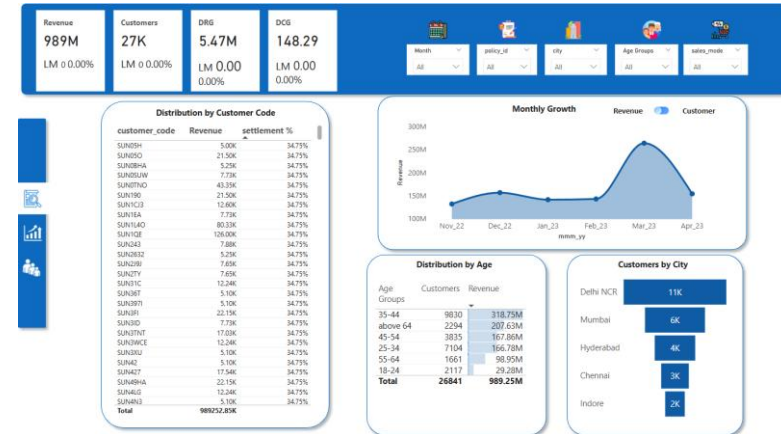
This dashboard focuses on analyzing **revenue** and **customer** data by **age group**. It shows which **age brackets** are the most active and how their preferences vary by policy. **Monthly trends** are included to understand changes in customer behavior over time.

Data model View



Overall Business Snapshot

- Revenue: ₹989M | Customers: 27K
- 35–44 age group is the top contributor (₹318M)
- Highest customer count in Delhi NCR (11K)
- March showed the best growth



Possible Reasons:

- March peak could be due to renewal offers or seasonal campaigns.
- Delhi NCR likely has better agent coverage or brand trust.

Suggestions:

- Try similar marketing in other cities.
- Repeat successful March offers in future months.

Revenue by Sales Mode and City



Revenue share by mode:

- Offline Agent: 56%
- Online App: 16%
- Offline Direct: 15%
- Online Website: 13%

Most revenue comes from Delhi NCR (₹402M)

Possible Reasons:

- Customers may prefer personal contact with agents
- Digital platforms may lack awareness or trust factor

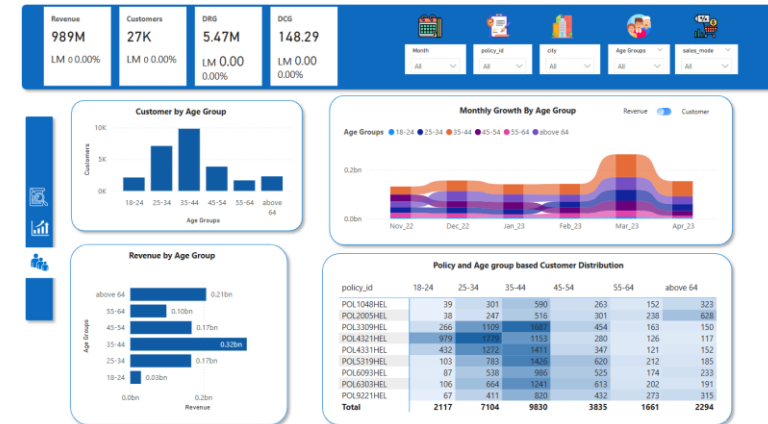
Suggestions:

- Offer extra benefits for online purchases
- Improve mobile app and website for ease of use
- Train agents to encourage digital shift



Customer distribution By Age

- Most customers: 35–44 (9.8K), 25–34 (7.1K)
- Low in 18–24 group (2.1K), also low revenue (₹29M)



Possible Reasons:

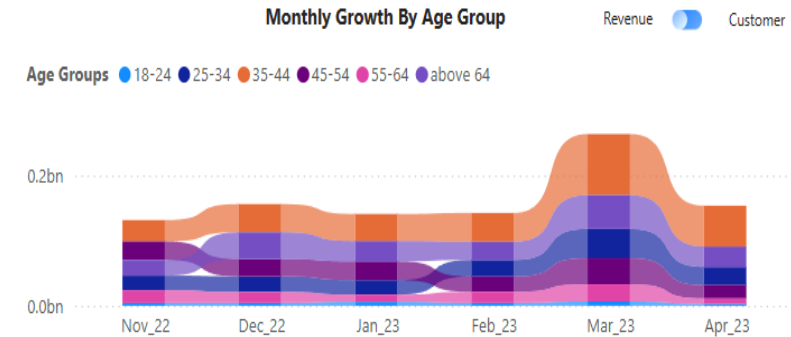
- Younger audience may not see value in insurance yet.
- Lack of affordable plans for students or new earners.

Suggestions:

- Introduce affordable policies for younger people.
- Promote health insurance benefits for early starters.

Monthly Growth by Age Group / Policy & Age Mapping

- Noticeable peak in March across most age groups, especially 25–44.
- March could have had a campaign or renewal drive.



Policy and Age group based Customer Distribution

policy_id	18-24	25-34	35-44	45-54	55-64	above 64
POL1048HEL	39	301	590	263	152	323
POL2005HEL	38	247	516	301	238	628
POL3309HEL	266	1109	1687	454	163	150
POL4321HEL	979	1779	1153	280	126	117
POL4331HEL	432	1272	1411	347	121	152
POL5319HEL	103	783	1426	620	212	185
POL6093HEL	87	538	986	525	174	233
POL6303HEL	106	664	1241	613	202	191
POL9221HEL	67	411	820	432	273	315
Total	2117	7104	9830	3835	1661	2294

- Policy **POL3309HEL** and **POL4321HEL** attract large customer base across age groups.
- Can focus campaigns around such policies.

- increase focus on **online modes** (app/website) for better digital reach.
- run targeted campaigns for **younger age groups (18–24)**.
- study March strategies for repeatable success.
- maintain strong-performing **offline event model**, but gradually digitize.

