Project Write Up

This project is about the Comparative Study of Countries to compare various parameters such as income, life insurance share, market share, penetration, ratio of reinsurance accepted, and retention ratio of different countries using the sample insurance dataset and world development indicators dataset.

The objective is to **create a dashboard to compare all the parameters mentioned above for different countries, to strategize market penetration and to target new customers.**

**MAP**

To start with the project, I created a map to show different income group around the world.

I dragged the Longitude on the column shelf and Latitude on the row shelf, then dragged Country code on the Text level shelf and Country on the Details shelf and then dragged Income on the Filter as well as Colour shelf. I got the desired map showing the different income group around the world.

**KPI**

To create a KPI table, I first created some parameters. I created Select Year parameter and Select Category parameter which includes life insurance share, market share, penetration, ratio of reinsurance accepted, and retention ratio as category. The I created a calculated field for the Select Category to link the parameter.

I also created calculated fields of Category for current year and Category for previous year. Then I created calculated fields for Growth, Growth Colour and Growth Indicator.

Then I first dragged the Measure names on the column shelf and Measure values on the text level shelf. I got a table with all the measures with their values. I removed the unwanted measure and then added the Category(CY), Category (PY) and Growth in the table by dragging them on the measures. Then I dragged the Income on the filter and choose the option of show filter for Category and Select year.

Finally, I had to change the decimal value to percentile for the values from format option and I got the desired KPI table.

**Growth Indicator**

For Growth indicator, I just dragged the growth indicator in the text level shelf and growth colour in the colour shelf and I got the indicator and then I just increased the size from the size shelf and adjusted the indicator colour from colour legend.

**Trend Chart**

For Trend Chart, I dragged the Year on the column shelf and Select Category on the row shelf. Then I dragged the Year on the pages shelf and Income on the filter shelf. The from the Year filter on the right selected the year 2016 and I got the trend line. Now from marks card I chose shape option and I added right arrow at the end of the line. Then I just choose show parameter option for Select year and Select category and my Trend chart is ready.

**Dashboard**

To create and interactive Dashboard, I chose the floating option for all the chart first and then I dragged all the charts on the dashboard. For map, I created an action to visit Wikipedia for countries and I linked the URL in the action. Also I added a different box to show the Wikipedia page and I added all the filters and colour legend to use the all the charts effectively from the dashboard.

**Formula**

**Category (CY)**

IF YEAR([Year])=YEAR([Select Year])

THEN [Select Category] END

**Category (PY)**

IF YEAR([Year])=YEAR([Select Year]) -1

THEN [Select Category] END

**Growth**

AVG([Category(CY)]) - AVG([Category(PY)])

**Growth Colour**

IF [Growth] >0 THEN "Green"

ELSEIF [Growth]=0 THEN "Black"

ELSEIF [Growth]<0 THEN "Red"

ELSEIF [Growth]= NULL THEN "None"

END

**Growth Indicator**

IF [Growth] >0 THEN "→ "

ELSEIF [Growth]=0 THEN "↔"

ELSEIF [Growth]<0 THEN "←"

ELSEIF [Growth]= NULL THEN "None"

END

**Select Category**

CASE [Parameters].[Select Category]

WHEN "Life insurance share" THEN [Life insurance share]

WHEN "Market share" THEN [Market share > Life]

WHEN "Penetration" THEN [Penetration > Life]

WHEN "Ratio of reinsurance accepted" THEN [Ratio of reinsurance accepted > Life]

WHEN "Retention ratio" THEN [Retention ratio > Life]

END