| **Analysis Focus** | **Plan** | **Purpose** | **Illustration** |
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| **Objection Breakdown Analysis** | Breakdown the count of objections by state, LOB, and month. | Understand regional and business-specific trends in objections. | Stacked Bar Chart, Line Chart |

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| **Impact on Financial Metrics** | Analyze total written premium and rate changes post-objection handling. | Evaluate financial impact to optimize pricing and negotiation. | Combination Chart (Bar and Line) |

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| **Objection Difficulty Categorization** | Categorize states and LOB into easy, moderate, and difficult based on objection rounds and counts. | Prioritize resources and tailor strategies for varying difficulty. | Bubble Chart, Heat Map |

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| **Theme-Based Objection Analysis** | Count objections by the 9 main themes and identify the most common ones. | Develop targeted responses and enhance team training. | Pie Chart, Treemap, Bar Chart |

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| **Identification of Repeated Objections** | Identify if specific questions are asked repeatedly and share insights quarterly. | Reduce redundancy with standardized responses for common questions. | Frequency Distribution Table, Word Cloud |

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| **Correlation Analysis Between Rates and Objections** | Determine if higher rates lead to more objections. | Adjust pricing strategies based on correlation insights. | Scatter Plot, Regression Line |

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| **Identification of New Types of Objections** | Regularly analyze data to identify emerging types of objections. | Recognize and address emerging objections promptly. | Time Series Line Chart, Bar Chart |

| **Proposed Analysis** | **Plan** | **Purpose** | **Illustration (Visual Representation)** |
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| **Objection Breakdown Analysis** | Breakdown the count of objections based on state, LOB, and month. | Understand regional and business-specific trends in objections to better target training and response strategies. | **Stacked Bar Chart** for LOB and state-wise breakdown; **Line Chart** for month-wise trend analysis. |

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| **Impact on Financial Metrics** | Analyze the total written premium and rate changes post-objection handling. | Evaluate the financial impact of objections to optimize pricing and negotiation strategies. | **Combination Chart (Bar and Line)** showing premium volume changes and rate changes side-by-side for easy comparison. |

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| **Objection Difficulty Categorization** | Categorize each state and LOB into easy, moderate, and difficult based on objection rounds and counts. | Prioritize resources and tailor strategies for different levels of objection difficulty to improve efficiency. | **Bubble Chart** where the size of the bubble indicates difficulty level; **Heat Map** for a geographical representation of difficulty by state. |

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| **Theme-Based Objection Analysis** | Count objections by the 9 main themes and identify the most common ones. | Pinpoint prevalent objection themes to develop targeted responses and enhance team training. | **Pie Chart** or **Treemap** for visualizing the proportion of objections by theme; **Bar Chart** for detailed counts of objections per theme. |

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| **Identification of Repeated Objections** | Identify if specific questions are asked repeatedly and share insights quarterly. | Reduce redundancy in handling objections by creating standardized responses for common questions. | **Frequency Distribution Table** with highlights for the most repeated questions; **Word Cloud** to show the most common questions visually. |

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| **Correlation Analysis Between Rates and Objections** | Determine if higher rates lead to more objections. | Adjust pricing strategies to balance competitiveness with objection volume, potentially improving conversion rates. | **Scatter Plot** showing the correlation between rates and objection volume; **Regression Line** to indicate trends and relationships. |

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| **Identification of New Types of Objections** | Regularly analyze data to identify emerging objection types. | Stay proactive by recognizing and addressing new objections promptly. | **Time Series Line Chart** to show trends of new types of objections over time; **Bar Chart** for frequency counts of new types. |

| **Analysis Type** | **Purpose** | | **Plan** | **Visualization** | **Business Impact** | | **Key Insights** |
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| 1. Objection Breakdown | Understand regional and business trends | | Break down objections by state, LOB, month | Stacked bar chart, Line chart | Optimize regional strategies | | • Identify high-objection areas<br>• Tailor approach by state/LOB |
| 2. Financial Impact | Evaluate impact on pricing and negotiation | | Analyze premium and rate changes post-objection | Combination chart (Bar and Line) | Enhance pricing and profitability | | • Quantify objection impact on premiums<br>• Refine rate-setting strategies |
| 3. Difficulty Categorization | Prioritize resources, tailor strategies | | Categorize states/LOBs by difficulty | Bubble chart, Heat map | Streamline objection handling | | • Prioritize resources based on difficulty<br>• Focus training on challenging areas |
| 4. Theme-Based Analysis | Develop targeted responses, enhance training | | Count objections by main themes | Pie chart/Treemap, Bar chart | Improve product-market fit | | • Uncover underlying objection themes<br>• Align product features with customer needs |
| 5. Repeated Objections | Standardize responses for common questions | | Identify frequently asked questions | Frequency table, Word cloud | Increase operational efficiency | | • Standardize responses to common objections<br>• Reduce response time and improve consistency |
| 6. Rates vs. Objections | Adjust pricing strategies | | Correlate rates with objection volume | Scatter plot, Regression line | Sharpen market positioning | | • Analyze rate sensitivity<br>• Optimize pricing for competitiveness |
| 7. New Objection Types | Address emerging objections promptly | | Identify new types of objections | Time series line chart, Bar chart | Maintain competitive edge | | • Proactively address new objection types<br>• Anticipate emerging customer concerns |
| **What We're Tracking** | | **Purpose & Key Insights** | | | | **Illustration Description** | |
| 1. Objection Breakdown | | • Understand regional and business trends<br>• Identify high-objection areas<br>• Tailor strategies by state/LOB | | | | "Objection Hotspots by State and LOB" | |
| 2. Financial Impact | | • Evaluate impact on pricing and negotiation<br>• Quantify objection impact on premiums<br>• Refine rate-setting strategies | | | | "Premium Changes vs. Objection Resolution" | |
| 3. Objection Difficulty | | • Prioritize resources and tailor strategies<br>• Focus training on challenging areas<br>• Streamline objection handling | | | | "Objection Complexity Map" | |
| 4. Objection Themes | | • Develop targeted responses<br>• Uncover underlying objection patterns<br>• Align product features with customer needs | | | | "Top Objection Themes Distribution" | |
| 5. Repeated Objections | | • Standardize responses for common questions<br>• Reduce response time<br>• Improve consistency in handling | | | | "Most Frequent Objection Questions" | |
| 6. Rates vs. Objections | | • Adjust pricing strategies<br>• Analyze rate sensitivity<br>• Optimize pricing for competitiveness | | | | "Correlation: Rate Levels and Objection Frequency" | |
| 7. New Objection Types | | • Address emerging objections promptly<br>• Anticipate customer concerns<br>• Maintain competitive edge | | | | "Emerging Objection Types Over Time" | |

| **What We're Tracking** | **Purpose & Key Insights** | **Visualization** |
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| 1. Objection Breakdown | • Understand regional and business trends<br>• Identify high-objection areas<br>• Tailor strategies by state/LOB | Stacked bar chart,<br>Line chart |
| 2. Financial Impact | • Evaluate impact on pricing and negotiation<br>• Quantify objection impact on premiums<br>• Refine rate-setting strategies | Combination chart<br>(Bar and Line) |
| 3. Objection Difficulty | • Prioritize resources and tailor strategies<br>• Focus training on challenging areas<br>• Streamline objection handling | Bubble chart,<br>Heat map |
| 4. Objection Themes | • Develop targeted responses<br>• Uncover underlying objection patterns<br>• Align product features with customer needs | Pie chart/Treemap,<br>Bar chart |
| 5. Repeated Objections | • Standardize responses for common questions<br>• Reduce response time<br>• Improve consistency in handling | Frequency table,<br>Word cloud |
| 6. Rates vs. Objections | • Adjust pricing strategies<br>• Analyze rate sensitivity<br>• Optimize pricing for competitiveness | Scatter plot,<br>Regression line |
| 7. New Objection Types | • Address emerging objections promptly<br>• Anticipate customer concerns<br>• Maintain competitive edge | Time series line chart,<br>Bar chart |