



SHIELD Insurance

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SHIELD INSURANCE

About Company

SHIELD Insurance Company, a well-known supplier of comprehensive insurance, is wholly committed to protecting people from unforeseen events. They stand out among other players in the market because of their focus on assuring coverage reliability.





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Operational Cities

The Company operates in **FIVE** cities across India:

- Mumbai
- Delhi NCR
- Chennai
- Hyderabad
- Indore





Sales Modes

The Company employs **FOUR** Sales Channels:

- Offline Agents
- Offline Direct
- Online App
- Online Websites





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Problem Statement

SHIELD Insurance seeks to enhance its data-driven decision-making capabilities by implementing a dashboard solution that provides actionable insights into key performance metrics.

To evaluate the effectiveness of this initiative, SHIELD Insurance is considering a **collaboration with AtliQ Technologies**.

Before committing to a full-scale project, SHIELD Insurance requires a **Pilot Project** to be developed in Power BI. **This Pilot Project will serve as a Proof of Concept**, demonstrating AtliQ Technologies' ability to meet the SHIELD Insurance's specific needs.

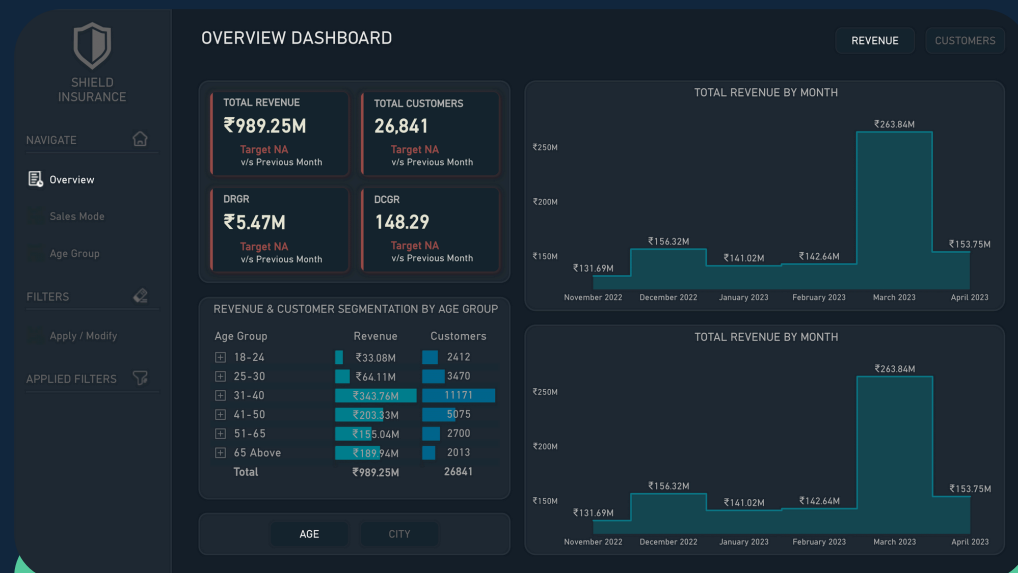




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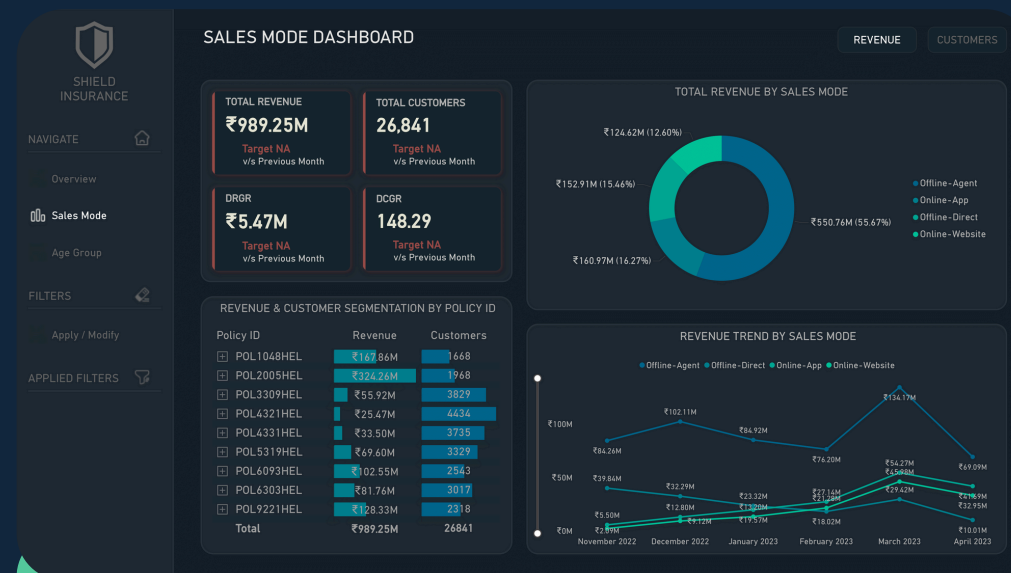
Power BI Dashboard

SHIELD Insurance Power BI Dashboard provides a comprehensive analysis of **Key Metrics**, offering insights into **Overall Performance**, **Sales Modes**, and **Age Group** segments to drive data-driven decisions.



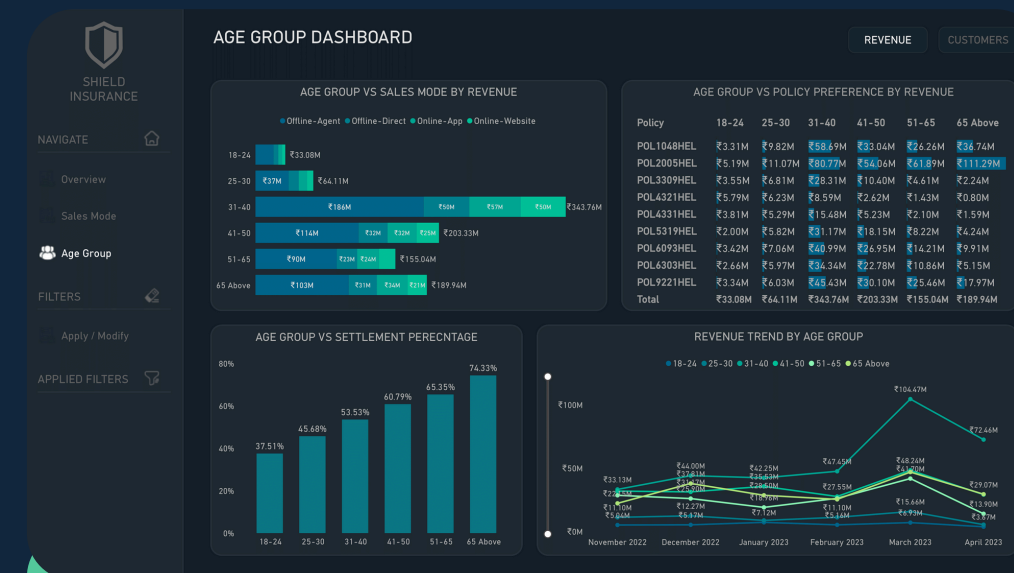
Overview` Dashboard

Provide an Overview of essential insurance metrics, including **Montly Revenue** and **Customer Trend** along with **Customer Segmentation**.



Sales Mode Dashboard

Revenue and **Customer** metrics based on different sales modes.



Age Group Dashboard

Revenue and **Customer** metrics based on different age groups.



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Key Insights

Overall Performance:

March 2023: Notable **Revenue** generation and **Customer** acquisition.

Regional Performance:

Delhi NCR: Significant results in both **Revenue** generation and **Customer** acquisition.

Demographic Insights:

Age Group 31 - 40: Leading in **Revenue** generation and **Customer** acquisition.





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Key Insights

Sales Channels:

Offline Agent Sales: Accounts for **55%** of **Revenue** generation and **Customer** acquisition.

Offline Direct Sales: Decline observed.

Online App Sales: Significant increase.

Policy Preference:

POL4321HEL: Larger **Customer** base.

POL2005HEL: Leads in **Revenue** generation.



Recommendations

- **Focus on Indore and Chennai:** Implement targeted strategies to boost **Customer** aquisition and **Revenue** generation in these regions.
- **Engage 18–30 Age Group:** Increase **Awareness** and tailor **Marketing** efforts to attract this underrepresented demographic.
- **Prioritize Digital Channels:** Leverage the growing trend in **Online Sales** through Apps and Websites.
- **Revitalize Offline Sales:** Address the decline in **Offline Sales** by identifying causes and **Enhancing Agent Incentives**.