SHIELD INSURANCE

PRESENTED BY:

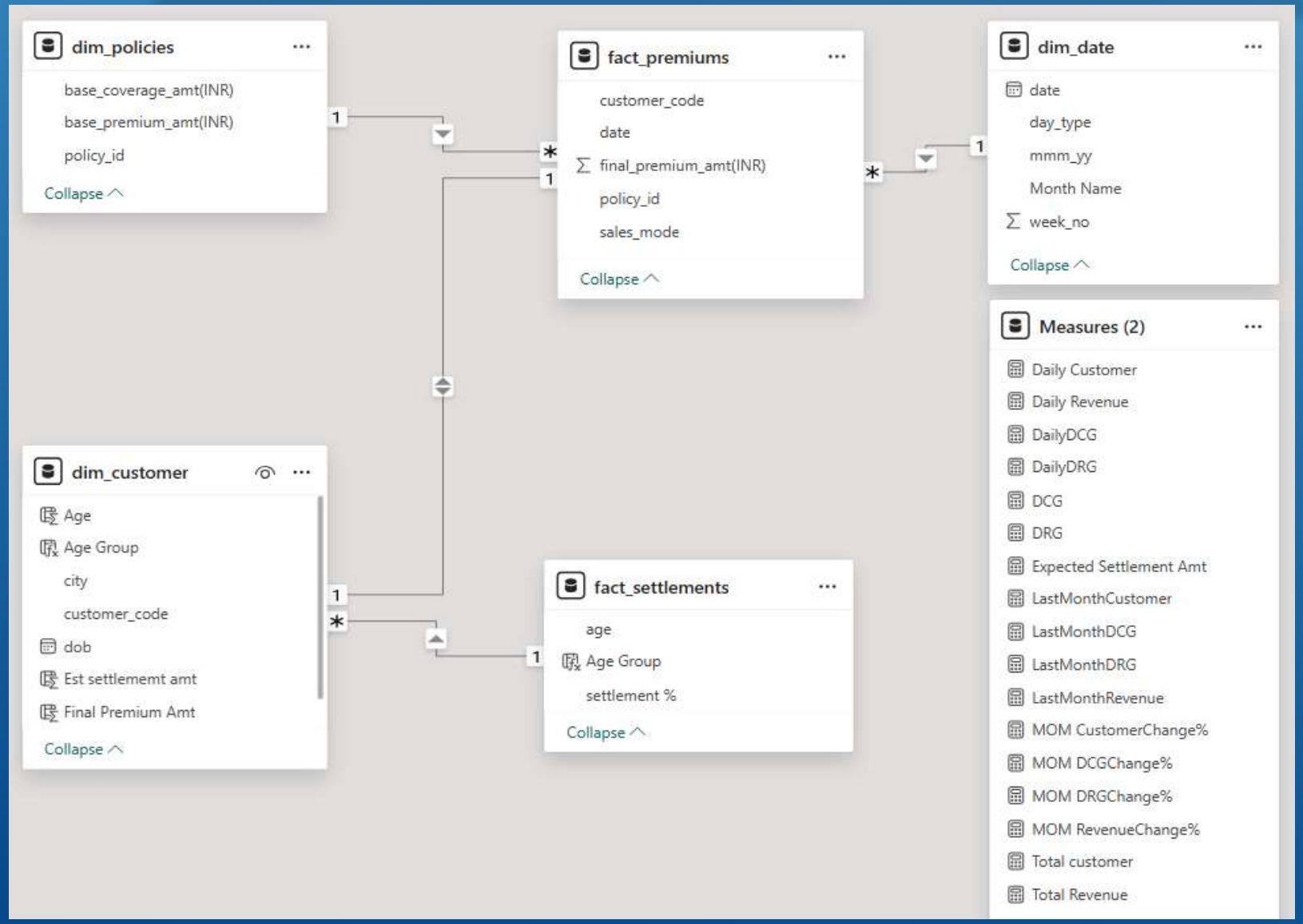
PRIYA AGRAWAL

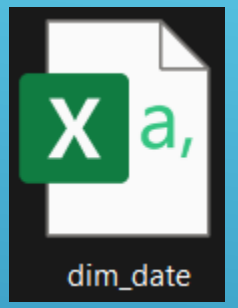
ABOUT COMPANY

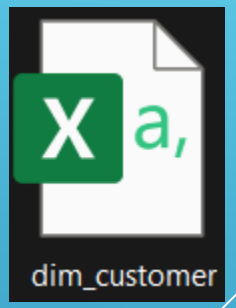
City	Sales Mode	Policy Number and Month
• Chennai • Delhi NCR • Indore • Hyderabad • Mumbai	• Offline agent • Offline Direct • Online App • Online Website	• 9 Policy • From November 2022 to April 2023

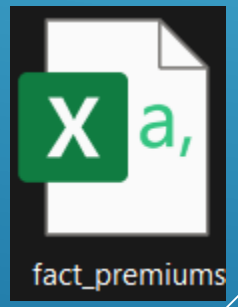
My task is to help Shield insurance make data driven decisions by analysing their data from November 2022 to April 2023

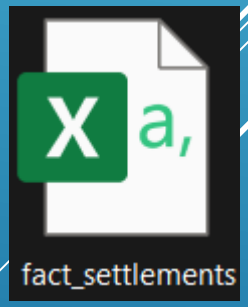
DATA SETS AND DATA MODEL



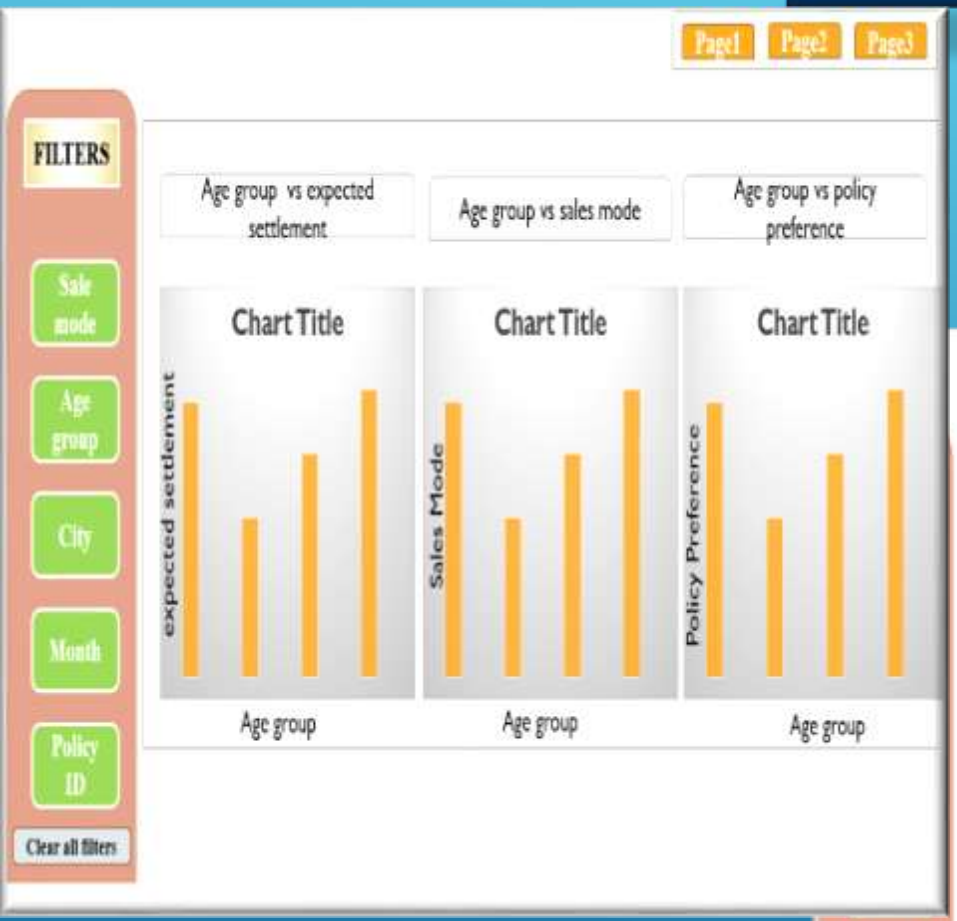








MOCK-UPS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FILTERS
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Month
Policy ID
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Age group vs expected settlement
Age group vs sales mode
Age group vs policy preference
Chart Title
Chart Title
Chart Title
expected settlement
Sales Mode
Policy Preference
Age group
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Age group

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Tot Customer
Tot Revenue
DCG
DRG
MOM chg%
MOM chg%
MOM chg%
MOM chg%
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Revenue Trend
Customer Trend
Customer /Revenue
Month
Age group
City
Total customer
Age Group
Customer
City
Total Revenue
DCG- Daily Customer Growth , MOM- Month Over Month , DRG - Daily Revenue Growth

INSIGHTS

1. CITY ANALYSIS

- Delhi NCR has the highest revenue and customer base, followed by Mumbai and Hyderabad.
- Indore has the least revenue and customer base.

2. POLICY ANALYSIS

- The POL2005HEL policy generates the highest revenue but The POL4321HEL has maximum customers.

3. AGE GROUP ANALYSIS

- The 31-40 age group generates the highest revenue and also maximum number of customers

4. SALES MODE ANALYSIS

- Offline agents generate the most revenue. It was the top performer generating 55.67% of total revenue and contributing 55.41% of all customers.

5. REVENUE TREND ANALYSIS

- Highest revenue shows in March 2023 and least revenue shows in November 2024.

6. CLAIM SETTLEMENT

- Customers of age-group had the highest expected settlement amount , while those of age-group of 18-24 had the least expected settlement amount.

RECOMMENDATIONS

1. CITY ANALYSIS

- Indore has the least revenue so focus on Indore by applying the strategies used by Delhi NCR to boost the revenue and customer growth.

2. POLICY ANALYSIS

- The POL2005HEL policy generates the highest revenue so focus on expanding marketing efforts, optimizing pricing, and enhancing customer experience to maximize its impact.

3. AGE GROUP ANALYSIS

- Find out why customers age 18-24 are less interested in buying policies. Consider offering affordable, customized plans that fit their needs and budget

4. SALES MODE ANALYSIS

- Most customers and revenue are come from offline agents so improve the customer support and website features to increase the online platform customers.