AGENDA

o Company Overview

o Problem Statement

o Tasks

o Dashboard Presentation

o Insights

o Recommendations

COMPANY OVERVIEW

Shield Insurance specializes in providing affordable and customizable insurance policies tailored to individuals across all age groups. With a strong presence in key cities like Mumbai, Chennai, Delhi, Hyderabad, and Indore.

The company ensures accessibility through diverse sales channels, including offline agents, direct sales, a mobile app, and a website.

PROBLEM STATEMENT

Shield Insurance wanted to enhance their decision-making process by leveraging advanced data-driven insights.

To assess our capabilities in delivering actionable analytics and supporting their business objectives, they initiated a pilot project as a step toward a potential long-term partnership.

TASK

○ **Customer and Revenue Insights:** Analyze total customers, revenue, daily growth rates, and trends using filters for city, age group, sales mode, and policies.

○ **Trend Monitoring:** Track month-over-month policy impacts and switch between customer and revenue trend graphs for better visualization.

○ **Sales Mode and Demographics:** Create dedicated pages to analyze sales mode trends, revenue splits, customer demographics, and policy preferences by age group.

○ **Actionable Insights:** Use segmented data and trends to make informed decisions and improve business performance.

INSIGHTS

○ **Revenue Highlights:** March 2023 marked the highest revenue month, while November 2022 had the lowest daily revenue and customer growth.

○ **Regional Insights:** Delhi NCR led in revenue generation, whereas Indore recorded the lowest revenue and customer numbers.

○ **Age Group Dominance:** The 31-40 age group contributed the most revenue and accounted for the largest customer share.

○ **Low Revenue Groups:** Customers aged 18-24 and 25-30 are the lowest among all age groups.

○ **Leading Sales Channel:** Offline agents drove 55.67% of the revenue and attracted 55.41% of the total customer base.

○ **Best-Selling Policy:** Policy ID POL2005HEL generated the highest revenue, despite being owned by just 7.3% of customers.

○ **Underperforming Policies:** Policies POL4321HEL and POL4331HEL accounted for 30.47% of customers but contributed only 5.9% of revenue.

○ **Claims Patterns:** Customers aged 65+ had the highest claim settlement amounts, while those aged 18-30 had the lowest.

RECOMMENDATION

o **Improve Regional Performance:** Identify and address specific challenges in Indore, and launch localized marketing campaigns to drive revenue and customer growth.

o **Tap into Delhi NCR:** Build on Delhi NCR's success by designing insurance plans tailored to attract younger and older age groups.

o **Engage Younger Audiences:** Investigate the low interest among 18-30 age groups and create affordable, personalized policies to meet their needs.

o **Strengthen Online Channels:** Focus on enhancing the website and running digital marketing campaigns to attract more online customers.

o **Capitalize on Top Policies:** Increase promotion of high-revenue policies like POL2005HEL to further boost sales and customer acquisition.

THANK YOU