Shield Insurance

Presentation - 2024

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SHIELD INSURANCE

Agenda

1) About Company

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2) Problem Statement

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1) About Company

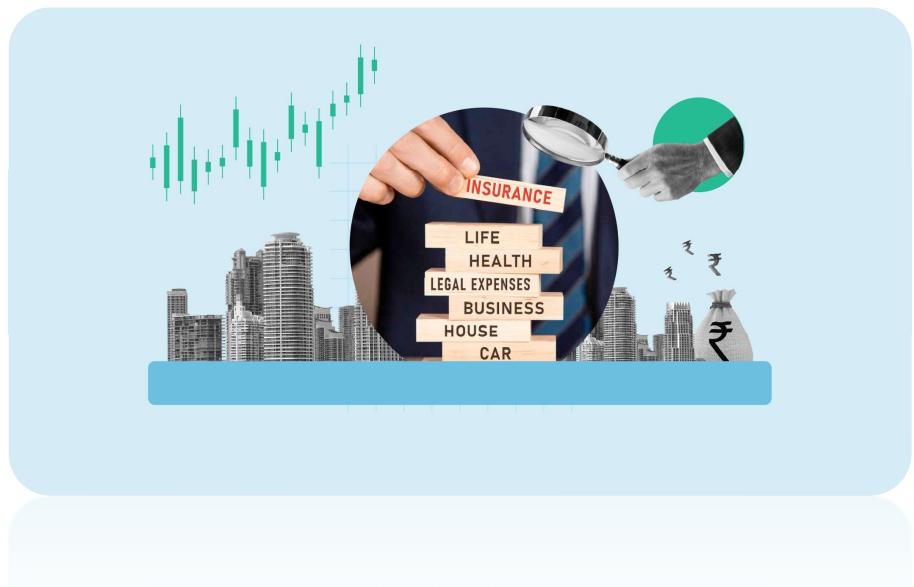2) Problem Statement

3) Dashboard

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1) About Company

2) Problem Statement

3) Dashboard

4) Recommendation

About Company

Shield Insurance Company is a well-know provider of complete insurance plans ,dedicated to protecting people from unexcepted events. They are recognized in the market of their focus on offering reliable coverage.

Operational Cities

The Company Operates in five cities across India.

1) Mumbai
2) Delhi
3) Chennai
4) Hyderabad
5) Indore

Sales Modes

The Company has four sales channels.

1) Offline Agents
2) Offline Direct
3) Online App
4) Online Website

Problem Statement

SHIELD Insurance aims to enhance its data-driven decision-making by implementing a dashboard solution that delivers valuable insights into key performance indicators.

To assess the success of this approach, SHIELD Insurance is considering partnering with ATLIQ Technologies.

Before proceeding with a full-scale project, SHIELD Insurance requests a Pilot Project in Power BI. This pilot will act as a Proof of Concept, showcasing ATLIQ Technologies' ability to meet SHIELD Insurance's specific requirements.

Key Insights

1. Overall Performance:
   March 2023: Significant increase in revenue and customer growth.

2. Regional Performance:
   Delhi NCR: Achieved notable results in both revenue expansion and customer acquisition.

3. Demographic Insights:
   Age Group 31–40: Leading in both revenue generation and customer acquisition.

Key Insights

4. Sales Channels:
   Offline Agent Sales : Accounts for 55% of revenue generation and
                                       customer acquisition.
   Offline Direct Sales : Decline Observed.
    Online App Sales   : Significant Increase.

5. Policy Performances:
   P0L432IHEL : Large Customer Base.
   P0L2005HEL: Leads Revenue Growth

Recommendations

1. Concentrate on Indore and Chennai: Develop specific strategies to enhance customer acquisition and increase revenue in these areas.

2. Target 18–30 Age Group: Raise awareness and customize marketing efforts to draw in this underrepresented demographic.

3. Focus on Digital Channels: Capitalize on the growing trend of online sales via apps and websites.

4. Revamp Offline Sales: Tackle the decline in offline sales by identifying root causes and improving agent incentives.

DHAVEL PATEL
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