

Policy & Sales Intelligence Dashboard

Total Customer

Total Revenue

Daily Revenue Growth

Daily Customer Growth

Policy Change Tracker → Bar chart showing month-to-month % and absolute changes.

Trend Switch → Toggle between revenue trend and customer trend line charts.

Customer Age Groups → Bar chart with age brackets.

Customers by City & Age Group → Two side-by-side tables.

Revenue by City & Age Group → Two side-by-side tables.

Filters → Dropdowns for Sales Mode, Age Group, City, Month, Policy ID.

Sales Mode Analysis

Total Customers by Sales Mode – Horizontal bar chart comparing Online, Agent, and Partner channels.

Total Revenue by Sales Mode – Horizontal bar chart showing revenue split across the same channels.

% Split & Trend – Visual breakdown of percentage share plus a monthly trend line to see changes over time.

Age group Analysis

Expected Settlement by Age Group – Bar chart showing which age groups bring in the highest settlement amounts.

Sales Mode Preference by Age Group – Quick view of which channels each age group prefers.

Policy Preference by Age Group – Snapshot of the most popular policies within each age group.