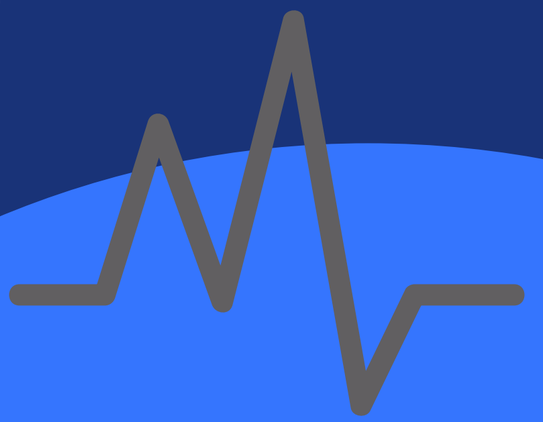
Shield
Insurance

PRESENTATION

Shield Insurance Analysis

Transforming Lives, Innovations and Challenges in Modern Insurance domain.



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Agenda

- Project Overview
- Objective
- Dashboards
- Key Insights
- Recommendations

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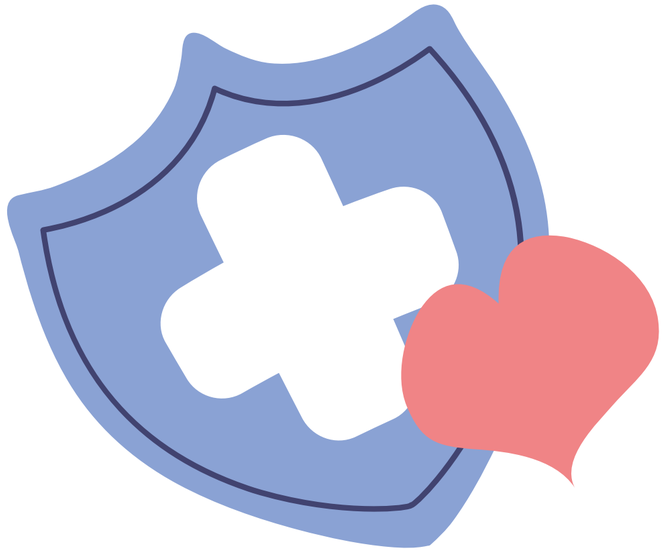
Project Overview

The main aim of this project was to conduct a comprehensive analysis of key performance metrics associated with customer acquisition, revenue generation, and policy effectiveness. I have developed an interactive dashboard that elegantly visualizes these insights, empowering the company to make informed, data-driven decisions.



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Objectives

- Monthly Revenue and Customer Acquisition Analysis
- Track Daily Revenue and Customer Growth Trends
- Evaluate Insurance Policy Performance
- Perform Age Group Segmentation
- Apply Filters for Detailed Analysis

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Key Insights

Delhi NCR has emerged as the leading market in terms of sales, while **Indore** has recorded the lowest sales figures among the cities analyzed.

The **31-40** age group leads in both revenue contribution and total customer count, while the **18-24** age group contributes the least revenue.

The **Offline-Agent** sales mode generates the highest revenue and customer count, whereas the **Online-Website** sales mode contributes the least in both categories..

March 2023 recorded the highest revenue, while **November 2022** had the lowest.

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Recommendations

Improve Online Sales: Enhance the user experience and marketing strategies for the Online-Website sales mode to boost its performance.

Youth Engagement: Create strategies to engage the 18-24 age group, potentially through digital channels and social media, to increase their revenue contribution.

Seasonal Promotions: Implement targeted promotions and campaigns in months with historically low revenue, such as November, to balance out the revenue distribution.

Agent Training and Support: Continue to invest in training and support for offline agents to maintain their high performance and customer acquisition rates.

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Thank You.

For Your Attention

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