



SHIELD INSURANCE

Presented By Shimran Gupta



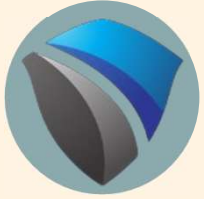
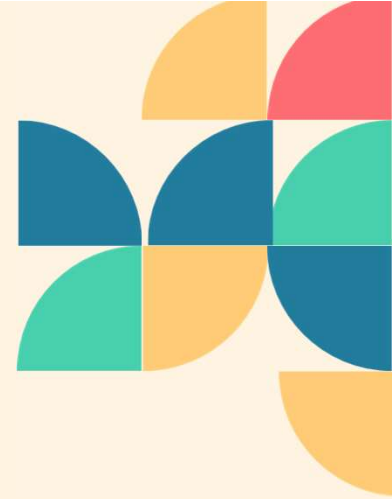
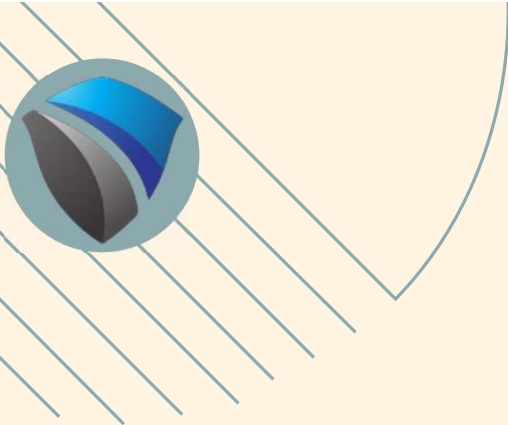


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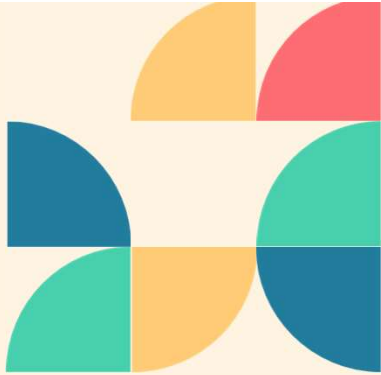


- Project Overview
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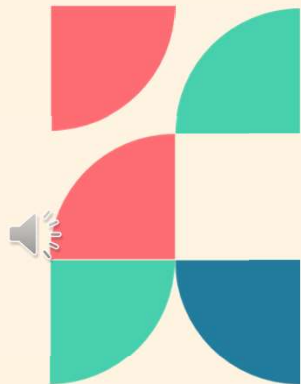


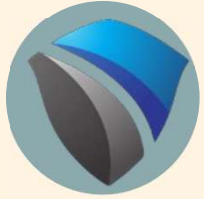


PROJECT OVERVIEW



- Shield Insurance, a major player in the industry, provides diverse insurance policies across five Indian cities.
- As part of my internship, I analyzed Shield Insurance's operational data to generate key insights that support strategic decision-making.
- The analysis was presented through an interactive Power BI dashboard, focusing on customer acquisition, revenue growth, and policy performance.

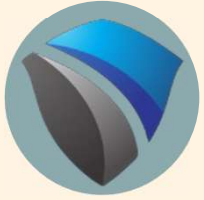




PROBLEM STATEMENT

- SHIELD Insurance lacks a clear way to track and analyze key metrics like revenue and customer acquisition.
- There's a need for an interactive dashboard to improve data-driven decision-making.
- SHIELD Insurance requires a pilot project from AtliQ Technologies to assess their ability to meet the company's needs.





OBJECTIVES



- Develop a pilot project in Power BI that demonstrates a centralized, interactive dashboard for visualizing key data insights.
- Analyze customer acquisition trends and revenue changes over time to highlight growth opportunities and potential challenges.
- Evaluate the performance of various insurance policies to pinpoint areas where improvements or adjustments can be made.
- Implement demographic segmentation and advanced filters to provide a more detailed analysis of customer behavior across age groups and other relevant metrics.





SHIELD INSURANCE

Shield your future, Secure peace of mind.



GENERAL ANALYSIS

Track essential KPIs, including monthly revenue, customer trends, age groups, and city segmentation, for comprehensive insurance insights.



SALES MODE ANALYSIS

Explore customer preferences in sales modes and view sales performance metrics across different channels, including revenue trend charts.



AGE GROUP ANALYSIS

Examine customer demographics and revenue, highlighting company performance by age group with details on estimated settlement amounts and policy preferences.

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Designed By : Shimran Gupta



FILTERS

SELECT MONTH

[Nov_22](#)[Feb_23](#)[Dec_22](#)[Mar_23](#)[Jan_23](#)[Apr_23](#)

SELECT CITY

[All](#)

SELECT AGE GROUP

[All](#)

SELECT POLICY

[All](#)

SELECT SALES MODE

[All](#)[CLEAR ALL SLICERS](#)[ABBREVIATIONS](#)

LM : Last Month

DRG : Daily Revenue Growth

DCG : Daily Customer Growth

989.3M

Total Revenue

Last Month : 835.5M **+18.40%****27K**

Total Customer

Last Month : 23K **+18.28%****5.47M**

DRG

Last Month : 5.53M **-1.22%****148.29**

DCG

Last Month : 150.28 **-1.32%**

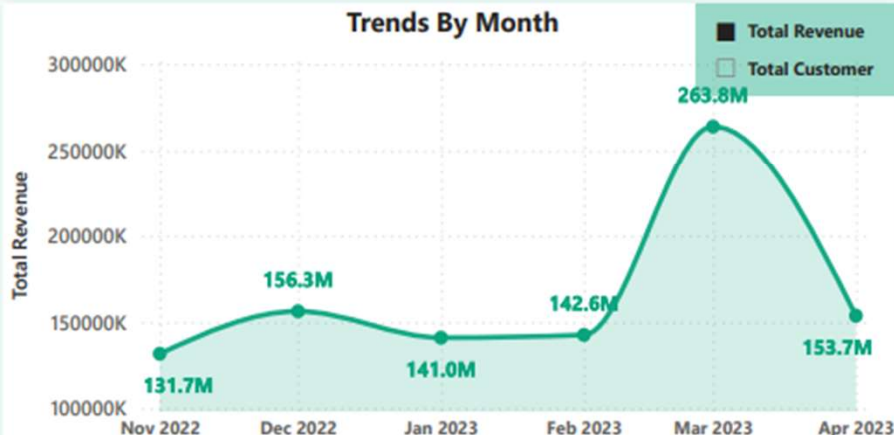
City wise customer segmentation

City	Total Customer	Total Revenue	Total Settlement Amount
<input checked="" type="checkbox"/> Mumbai	6432	239.51M	142.56M
<input checked="" type="checkbox"/> Indore	2096	81.35M	48.43M
<input checked="" type="checkbox"/> Hyderabad	4340	160.52M	95.82M
<input checked="" type="checkbox"/> Delhi NCR	11007	401.57M	239.03M
<input checked="" type="checkbox"/> Chennai	2966	106.31M	63.35M

Revenue Split

city	Total Revenue	Total Customer
Chennai	106.31M	2966
Delhi NCR	401.57M	11007
Hyderabad	160.52M	4340
Indore	81.35M	2096
Mumbai	239.51M	6432

Trends By Month



Customer Split

Age Group	Total Revenue	Total Customer
18-24	30.74M	2239
25-30	61.50M	3407
31-40	335.72M	10977
41-50	210.60M	5357
51-65	156.92M	2792
65+	193.77M	2069



FILTERS
SELECT MONTH

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Dec_22Mar_23

Jan_23Apr_23

SELECT CITY

All

SELECT AGE GROUP

All

SELECT POLICY

All

SELECT SALES MODE

All

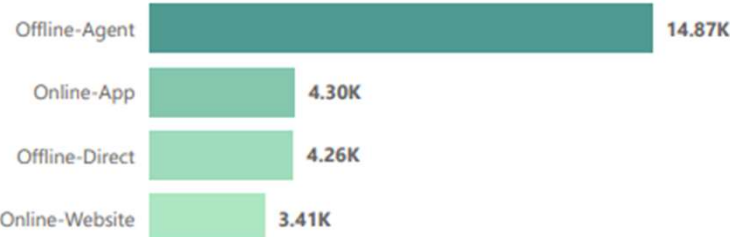
CLEAR ALL SLICERS

ABBREVIATIONS

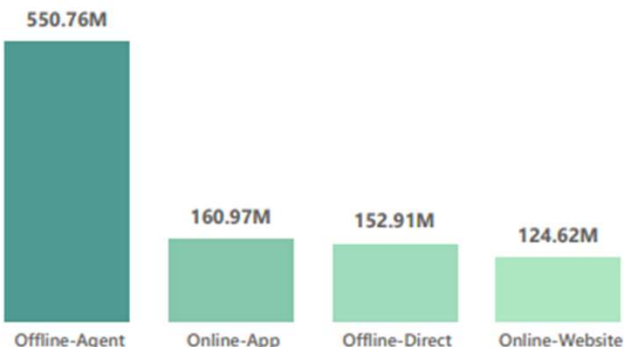
LM : Last Month
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DCG : Daily Customer Growth



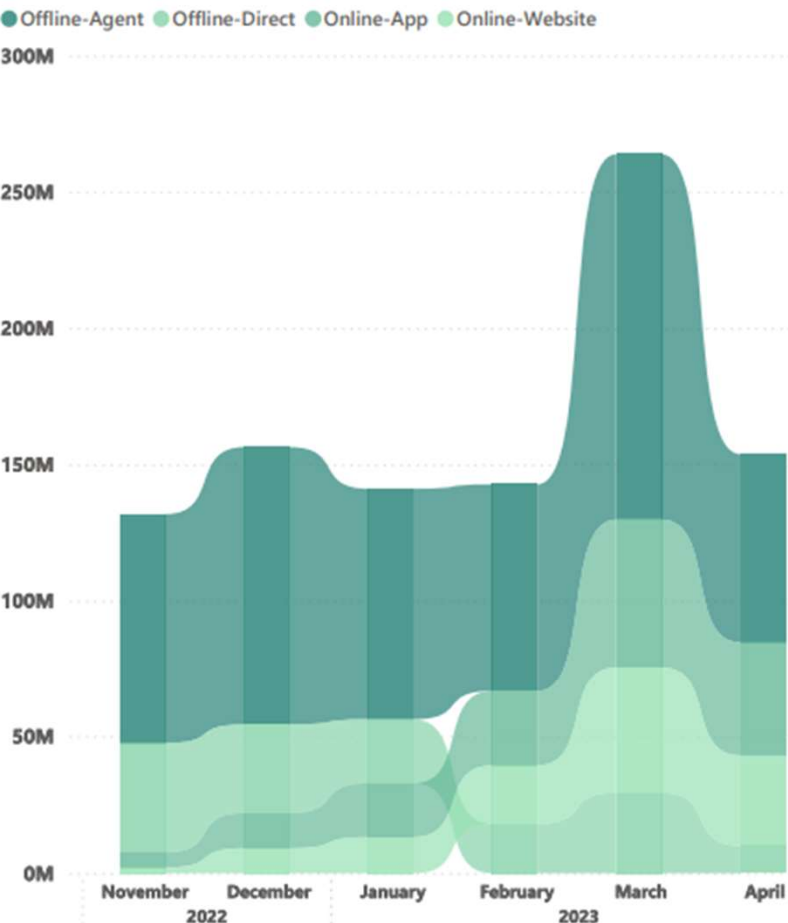
Total Customer by sales_mode



Total Revenue by sales_mode



Total Revenue By Month and Sales Mode





FILTERS

SELECT MONTH

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SELECT CITY

[All](#)

SELECT AGE GROUP

[All](#)

SELECT POLICY

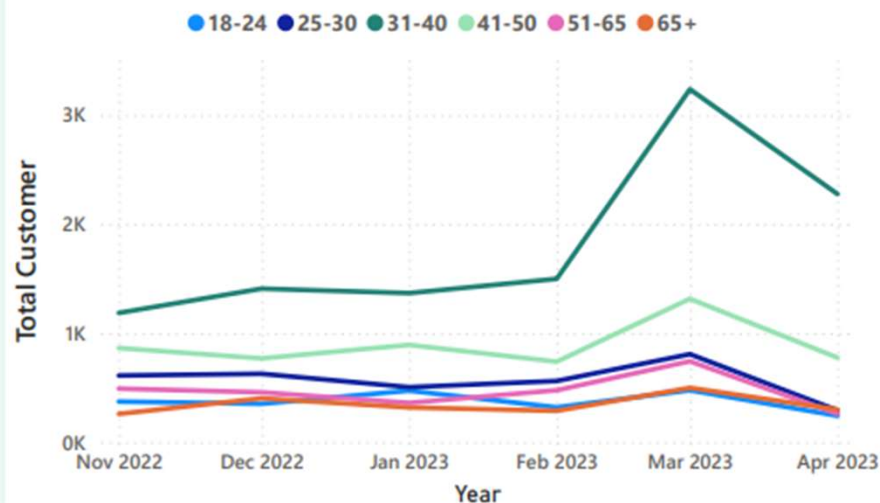
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SELECT SALES MODE

[All](#)[CLEAR ALL SLICERS](#)[ABBREVIATIONS](#)

LM : Last Month
DRG : Daily Revenue Growth
DCG : Daily Customer Growth

Total Customer by Year, Month and Age Group



Customer metric by age group v/s Policy Preferences

policy_id	18-24	25-30	31-40	41-50	51-65	65+
POL1048HEL	40	111	629	340	244	304
POL2005HEL	39	83	545	351	358	592
POL3309HEL	276	490	1945	707	287	124
POL4321HEL	1044	1175	1449	453	209	104
POL4331HEL	455	661	1686	592	207	134
POL5319HEL	109	318	1511	862	361	168
POL6093HEL	95	197	1051	670	326	204
POL6303HEL	110	249	1297	824	381	156
POL9221HEL	71	123	864	558	419	283

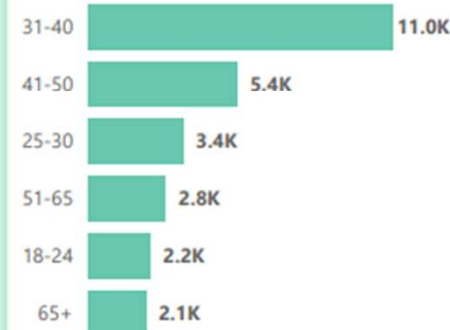
Customer metric by age group v/s sales mode

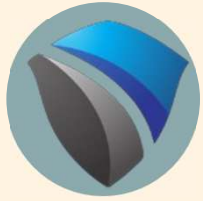
Age Group	Offline-Agent	Offline-Direct	Online-App	Online-Website
18-24	1283	393	323	240
25-30	1921	612	493	381
31-40	5914	1635	1868	1560
41-50	3019	842	817	679
51-65	1596	439	430	327
65+	1140	335	371	223

Age Group Total Settlement Amount

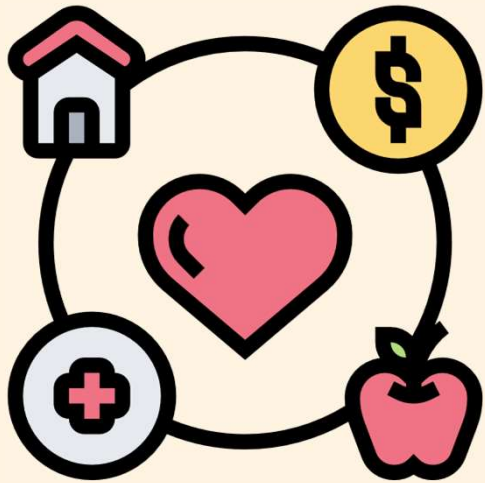
Age Group	Total Settlement Amount
18-24	11.76M
25-30	28.31M
31-40	181.05M
41-50	127.73M
51-65	102.35M
65+	138.00M

Total Customer by Age Group



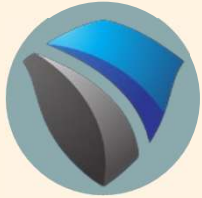


KEY INSIGHTS

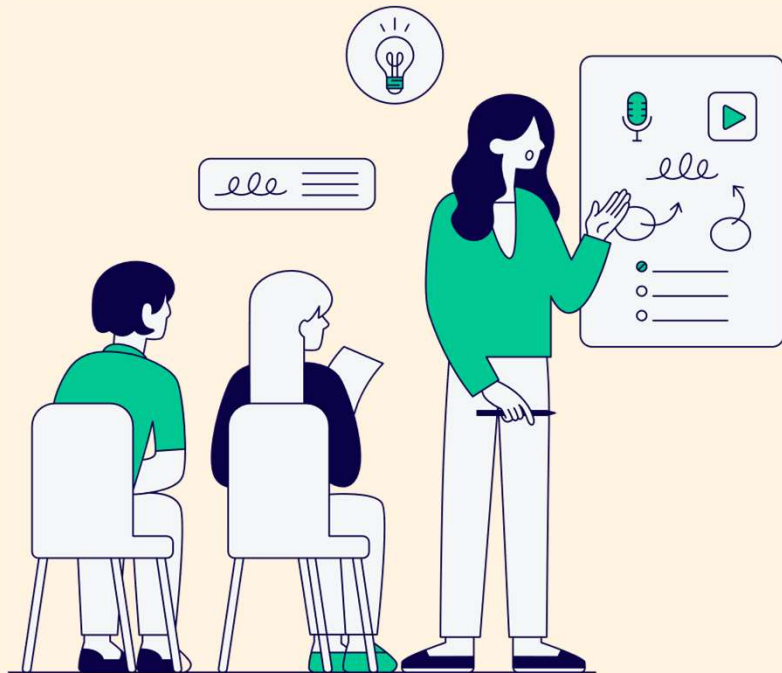


Overall Performance

- Total Revenue: ₹989.3M, a significant increase of 18.40% compared to last month's ₹835.5M.
- Total Customers: 27K, up by 18.28% from 23K in the previous month.
- Revenue Trend: The highest revenue month was March 2023, generating ₹263.8M, followed by December 2022 (₹153.7M) and April 2023 (₹142.6M).
- Growth Trends:
- Daily Revenue Growth (DRG): Slight decline of 1.22% from 5.53M to 5.47M.
- Daily Customer Growth (DCG): Also experienced a marginal decrease of 1.32% from 150.28 to 148.29.

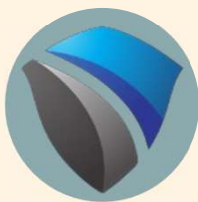


KEY INSIGHTS



City-Wise Performance:

- Delhi NCR: Generated the highest revenue of ₹401.57M with 11,007 customers and a settlement amount of ₹239.03M.
- Mumbai: Contributed ₹239.51M in revenue from 6,432 customers, with a settlement amount of ₹142.56M.
- Hyderabad: ₹160.52M in revenue, acquired 4,340 customers, and had a settlement amount of ₹95.82M.
- Chennai: Revenue of ₹106.31M from 2,966 customers, with a settlement amount of ₹63.35M.
- Indore: ₹81.35M in revenue from 2,096 customers, with a settlement amount of ₹48.43M.



KEY INSIGHTS


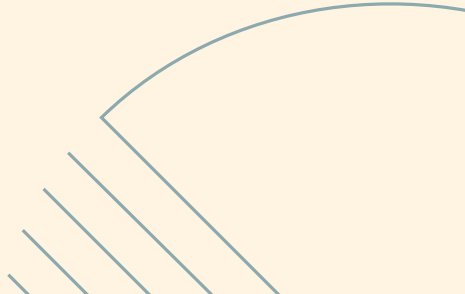


- **Sales Channels:** Offline-agent sales dominate with ₹550.76M and 14.87K customers, but online channels (₹160.97M from the app) are growing rapidly.
- **Demographic Insights:** The 31-40 age group is the largest revenue generator, contributing ₹335.72M from 10,977 customers. The 65+ group has high settlement amounts, indicating increased risk.
- **Policy Preferences:** POL4321HEL is the most popular policy, particularly among the 31-40 age group, while POL2005HEL leads in the 65+ age group.



RECOMMENDATIONS



- Invest in enhancing digital sales channels, especially the app and website, to capture more online customers.
 - Create tailored products for the 31-40 age group to maximize revenue potential.
 - Develop specialized policies for the 65+ segment to address their higher settlement needs.
 - Focus on regional marketing in Delhi NCR and Mumbai to boost customer acquisition.
 - Incentivize offline agents to further drive sales and increase cross-selling opportunities.
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THANK YOU

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