Shield Insurance Company: Your Trusted Partner

A comprehensive analysis of Shield Insurance's performance and strategies for 2024, crafted by Sima Mishra.

Sima Mishra

About Shield Insurance Company

Reliable Insurance Solutions for Peace of Mind

→ **Commitment to Safety**

Shield Insurance Company ensures safety for individuals and businesses.

→ **Diverse Insurance Plans**

Offers a variety of insurance plans tailored for customer protection.

→ **Reputation for Reliability**

Known for its reliability, Shield Insurance builds trust with clients.

→ **Customer-Centric Approach**

Focuses on making customers feel safe and secure through excellent service.

Data Analyst Profile Overview

[MY PORTFOLIO](#)

Sima Mishra

Data Analyst

Aspiring data analyst with a strong foundation in statistical analysis. Proficient in Excel, SQL, and Power BI. Aims to leverage data to drive informed decisions and enhance business strategies.

Comprehensive Meeting Agenda Overview

Key discussion points for today's meeting
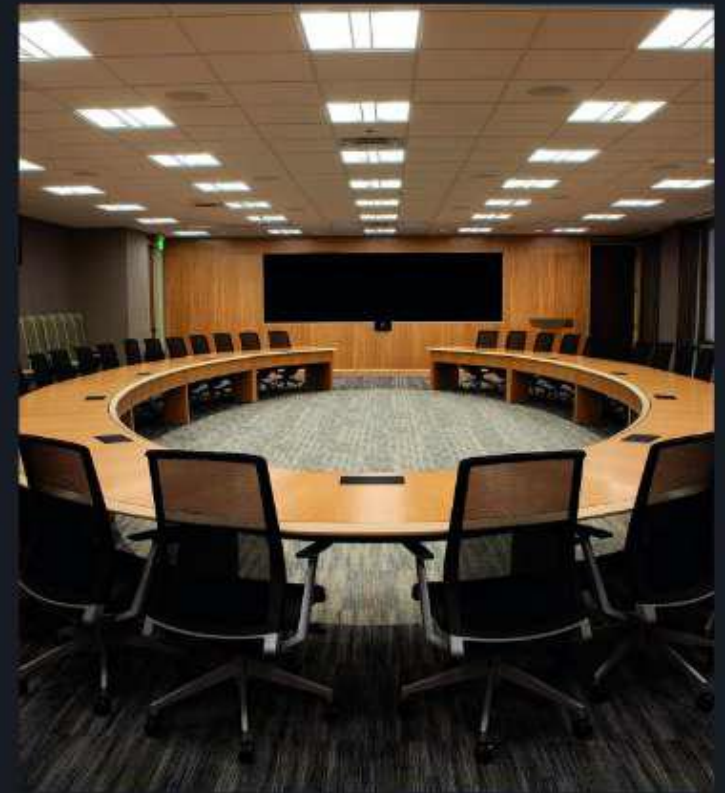
01 General View

An overview of the main topics and objectives for today's meeting.

02 Age Group View

Discussion on how different age groups impact our sales strategies and customer engagement.

03 Sales Mode View

Exploration of various sales modes and their effectiveness in the current market.

KPI Insights

General View - Executive Insights

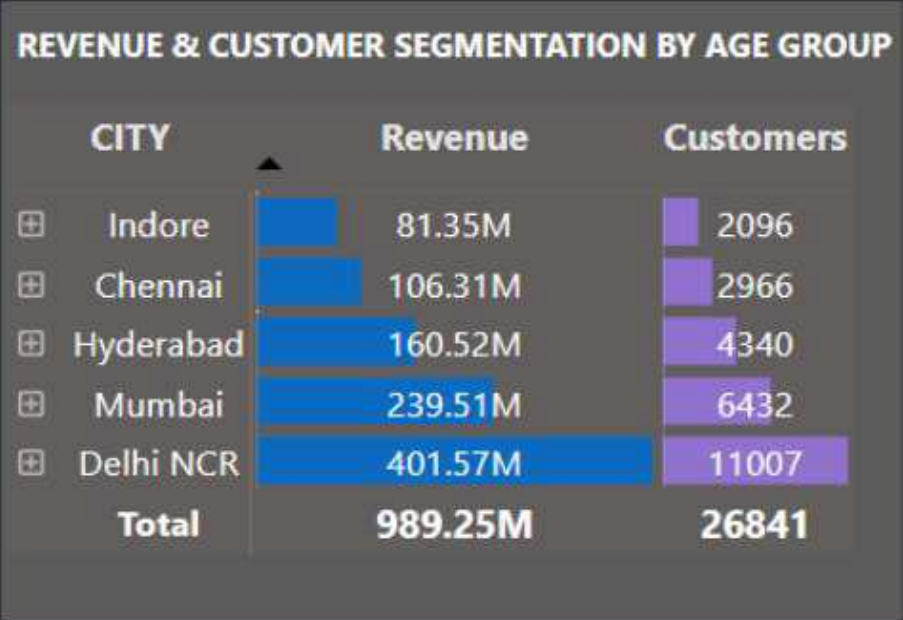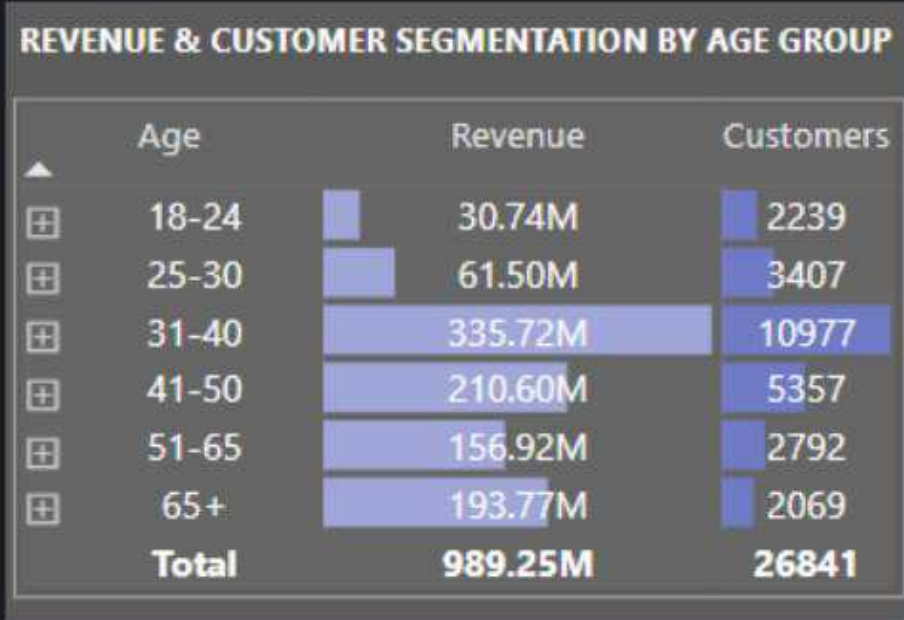Essential KPIs empowering executives with in-depth insights for strategic decision-making to drive organizational success.

Revenue & Customer Segmentation by Age with City Distribution

Insights on age demographics across major cities

REVENUE & CUSTOMER SEGMENTATION BY AGE GROUP

Age	Revenue	Customers
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
Total	**989.25M**	**26841**

REVENUE & CUSTOMER SEGMENTATION BY AGE GROUP

CITY	Revenue	Customers
Indore	81.35M	2096
Chennai	106.31M	2966
Hyderabad	160.52M	4340
Mumbai	239.51M	6432
Delhi NCR	401.57M	11007
Total	**989.25M**	**26841**

Detailed Insights

Revenue and Customer Distribution by Age and Region

01

Total Revenue Overview

Total revenue reached ₹989.25M from 26,841 customers across all age segments.

02

Top Performing Age Group

The 31-40 age group generated the highest revenue of ₹335.72M with 10,977 customers.

03

Second Highest Revenue Age Group

The 41-50 age group followed with ₹210.60M revenue from 5,357 customers.

04

Lowest Revenue Age Group

The 65+ age group contributed the least with ₹44.47M from 2,069 customers.

05

Leading Geographic Region

Delhi NCR leads with ₹401.57M revenue from 11,007 customers.

06

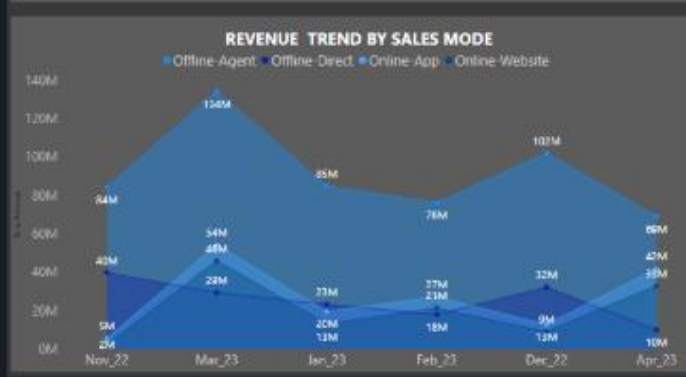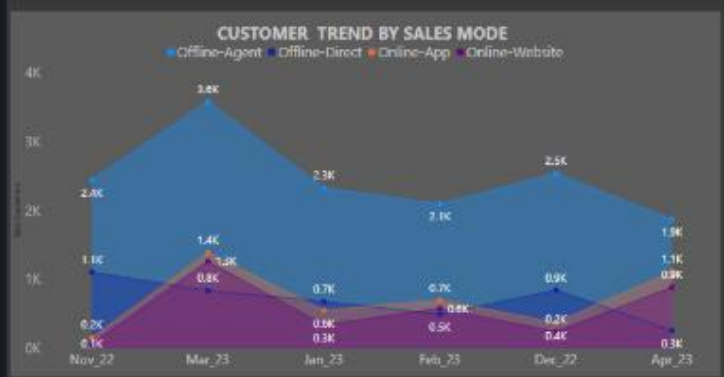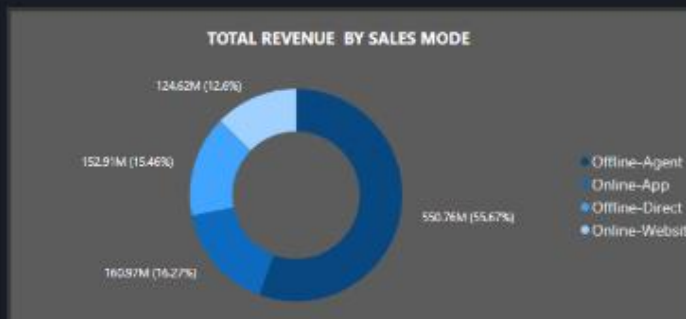### Strong Performer Cities

Mumbai and Hyderabad also performed well with ₹239.51M and ₹160.52M respectively.

07

Emerging Markets

Chennai and Indore showed smaller but significant revenues of ₹106.31M and ₹81.35M.

Sales Mode View - Title Analysis

Comprehensive Overview of Sales Performance

Sales Mode View - Key Insights

Analyzing Sales Performance Across Different Channels

Top Sales Channel
Offline-Agent sales mode attracted most customers and generated the highest revenue.

Growth Trend
Online sales exhibited a notable growth starting from February 2023.

Decline Note
Offline-Direct mode has shown a significant decline in customer engagement.
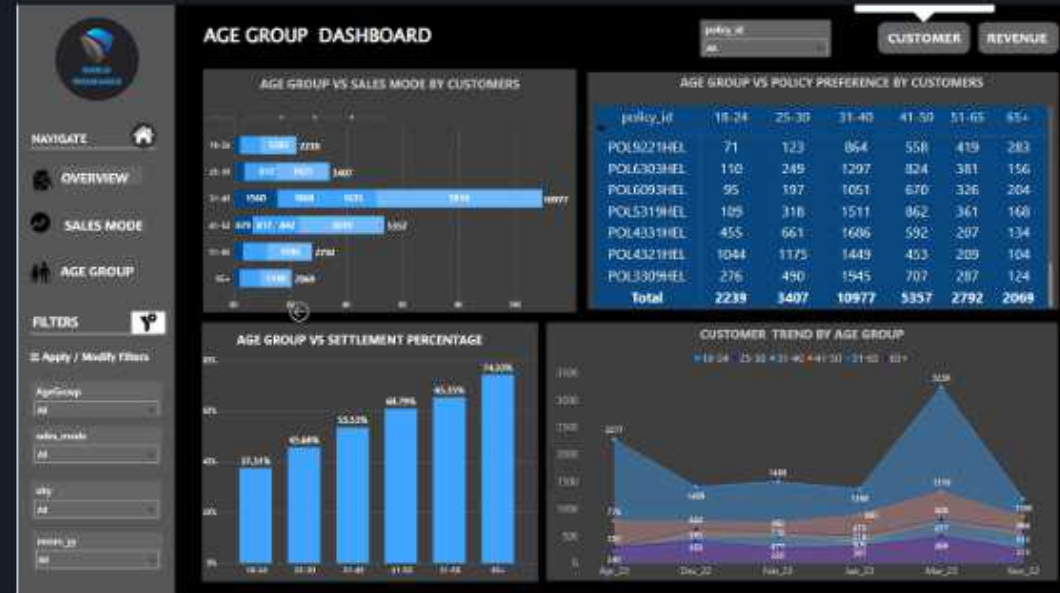
Popular Policy
'POL4321HEL' with a base premium of ₹5,000/- has a customer base exceeding 4000.

Demographic Distribution
The 31-40 age group dominates the customer base across all policies.

Age Group View

Insights

OpinjOns are Often cOnfessiOns in disguise

01 Demographic Distribution

31-40 age group dominates with 10,977 customers (41% of total) and highest revenue contribution (₹335.72M)

02 Sales Channel Effectiveness

Offline-Agent mode is most effective across all groups, with 31-40 segment generating ₹182M through this channel

03 Policy Preferences

POL4321HEL most popular with 31-40 age group (1,449 customers); POL2005HEL generates highest revenue from 65+ segment (₹113.02M)

04 Settlement Pattern

Clear trend of increasing settlement rates with age (37.51% for 18-24 to 74.33% for 65+)

05 Seasonal Trends

March 2023 showed peak revenue (31-40 group contributing ₹101M) and highest customer acquisition (3,238 customers)

Comprehensive Performance Dashboard

Insights from the Power BI Dashboard Analysis

75% User Engagement

$500K Sales Revenue

25% Increase in Leads

10% Improvement in Conversion Rate

80% Customer Satisfaction

High user interaction
75% of users interact with the dashboard regularly,

Robust sales performance
$500K in sales revenue achieved this quarter, showcasing

Lead generation growth
Lead generation has increased by 25%, reflecting

Effective sales tactics
The conversion rate has improved by 10%, indicating

High satisfaction levels
Customer satisfaction stands at 80%, highlighting quality

Appreciation

Thank You

We appreciate your time and attention during this presentation. Your engagement is invaluable to our success and future endeavors.