

PROJECT PRESENTATION ON SHIELD INSURANCE, YOUR TRUSTED PROTECTOR

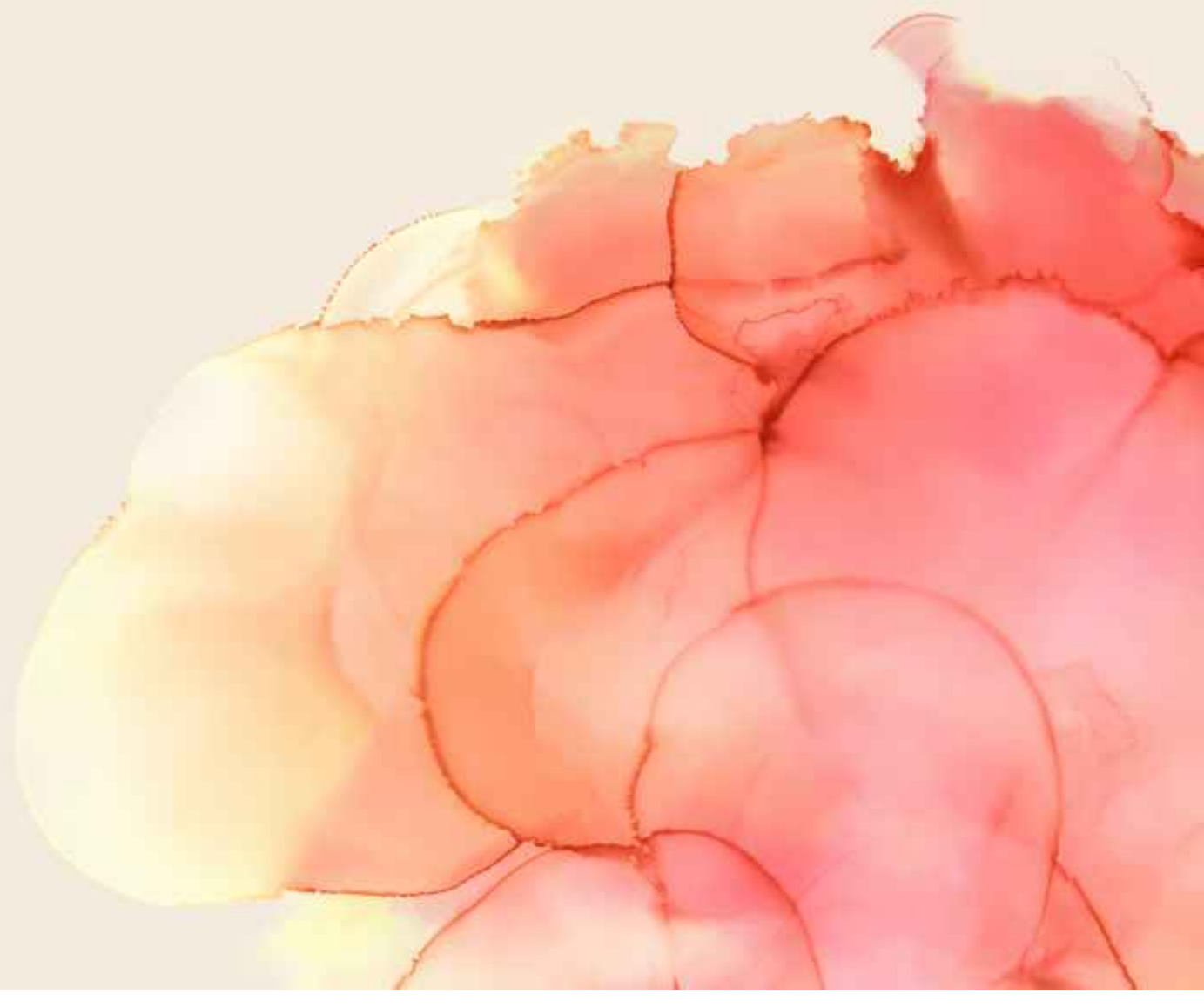
*Presented By Abhinav
Ghosh*





ABOUT SHIELD INSURANCE:

Shield Insurance is renowned for offering comprehensive coverage that safeguards individuals against life's unexpected events. Trusted for their unwavering commitment to reliability, they provide protection you can count on.



PROBLEM STATEMENT:

Shield Insurance faces challenges in monitoring critical business metrics such as customer growth, revenue generation, and policy trends. With a growing customer base and a variety of sales modes, it is essential to have a clear understanding of these key drivers to facilitate effective decision-making. The lack of an integrated, interactive dashboard has made it difficult to track real-time data, identify trends, and gain insights for strategic business decisions.

PROJECT GOAL:

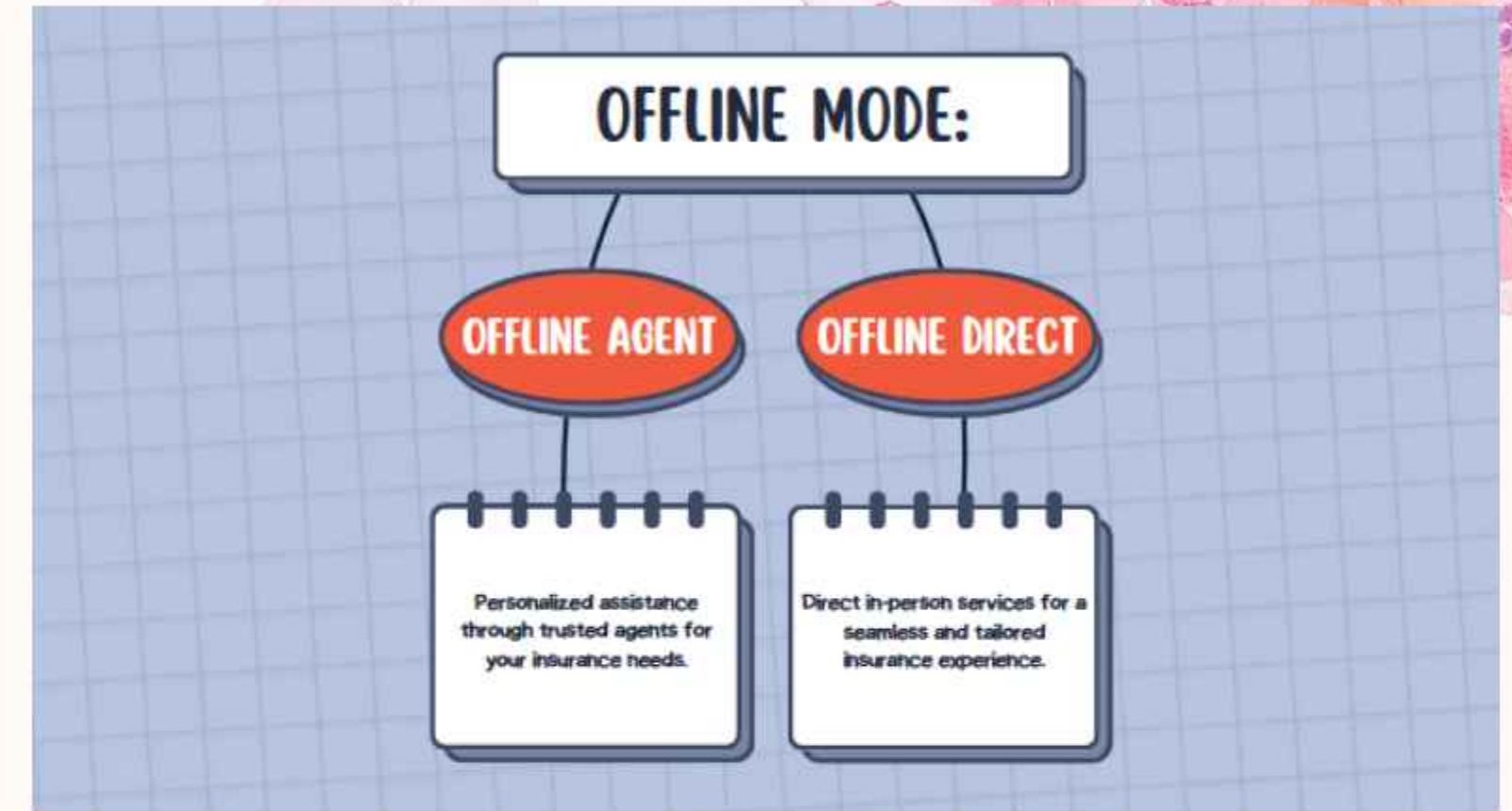
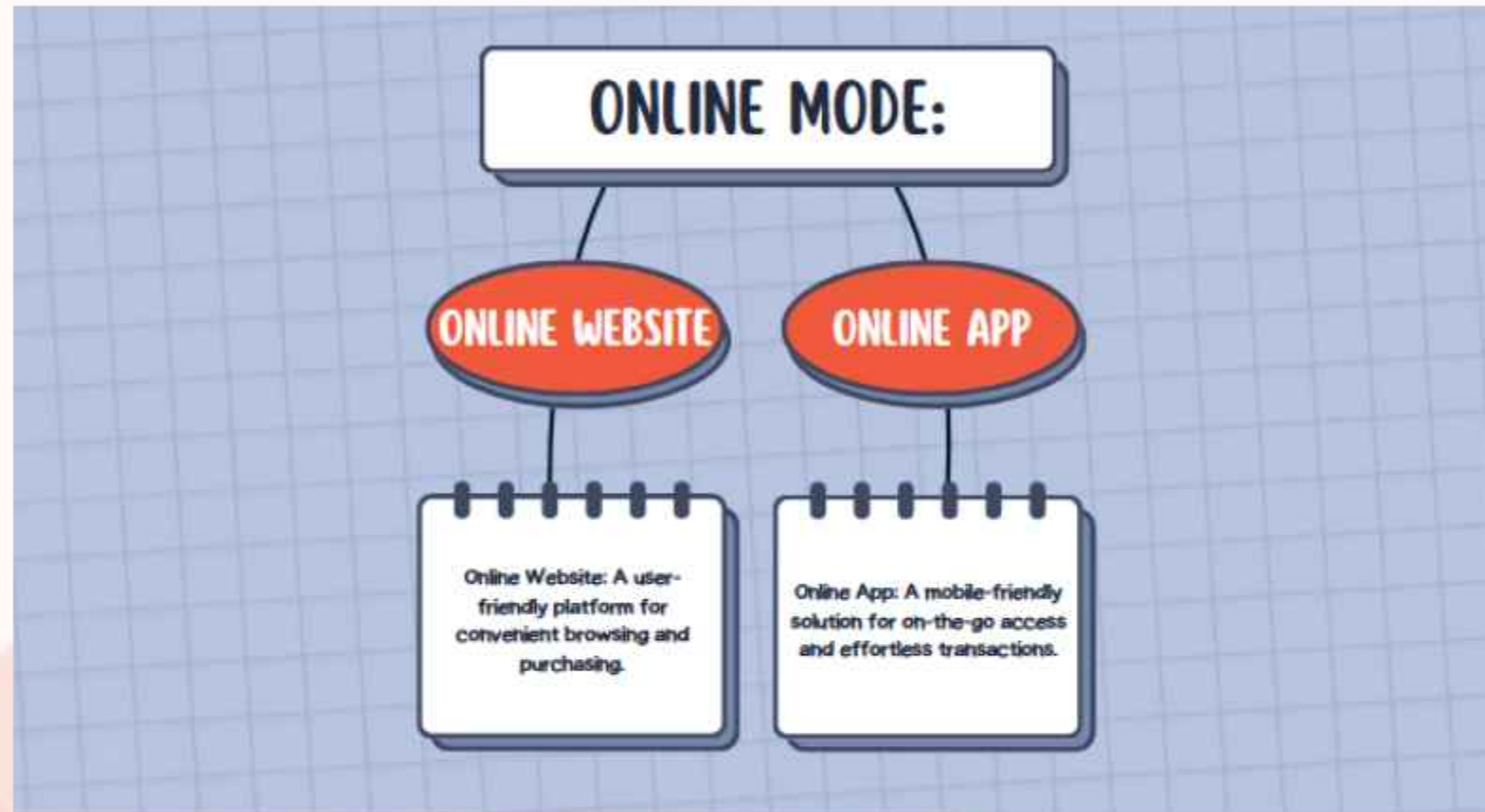
The primary goal of this project is to develop a robust, interactive dashboard that provides deep insights into the operational performance of Shield Insurance. This will include tracking the number of customers, total revenue, growth rates, policy trends, and customer segmentation by age and city. By creating dynamic visualizations and enabling easy filtering options, the project aims to enhance the ability to monitor business progress, identify trends, and ultimately support data-driven decision-making to drive growth and improve performance.

POLICIES:

policy_id ▾	base_coverage_amt(INR) ▾	base_premium_amt(INR) ▾
POL4321HEL	200000	5000
POL4331HEL	300000	7500
POL3309HEL	500000	12000
POL5319HEL	750000	16700
POL6303HEL	1000000	21500
POL6093HEL	1500000	31700
POL9221HEL	2500000	42500
POL1048HEL	5000000	76500
POL2005HEL	10000000	120000

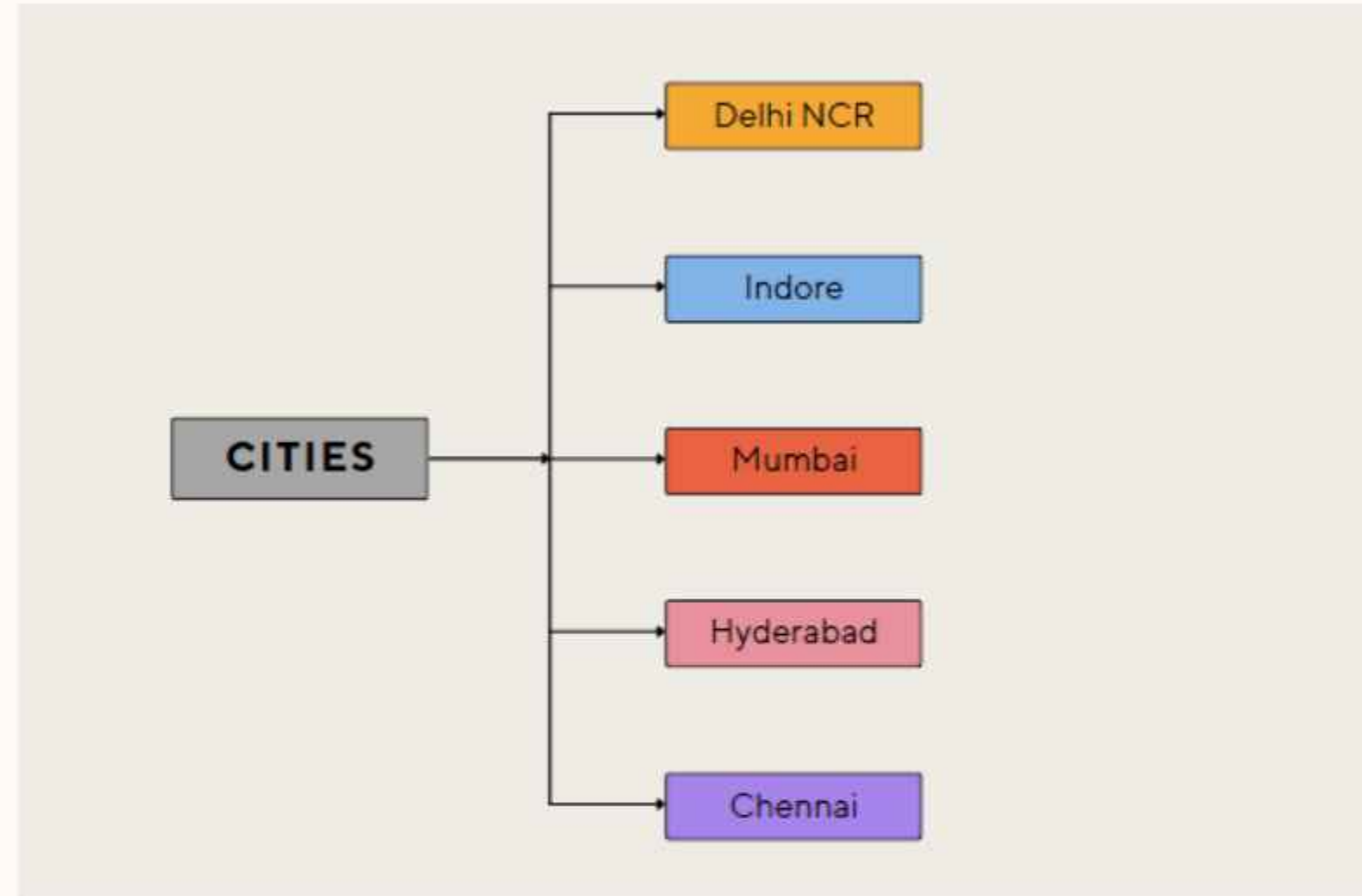
Shield Insurance offers a comprehensive selection of 9 distinct policies to meet diverse needs.

SALES MODE:



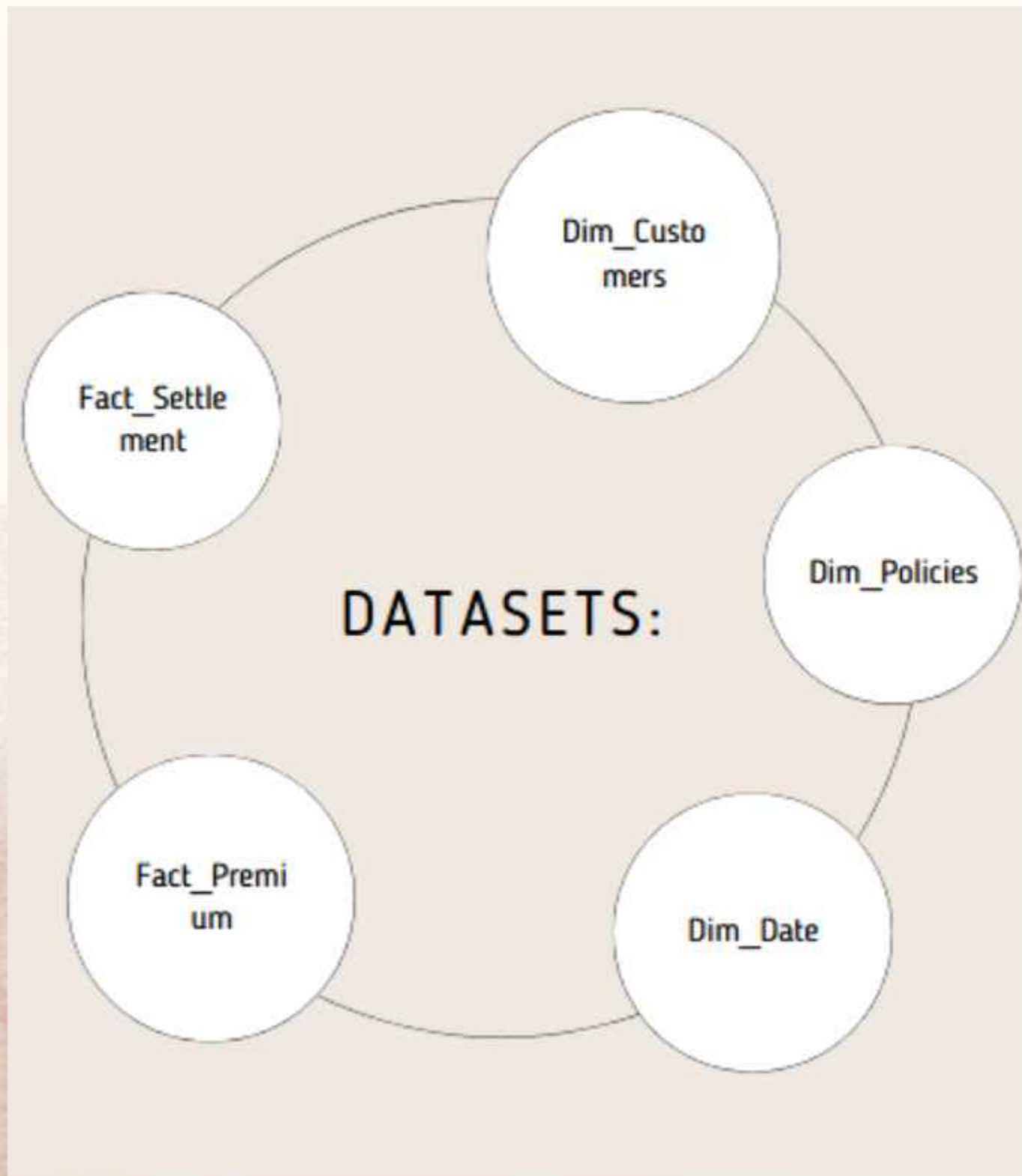
Shield Insurance offers both online and offline options for convenience and accessibility. Customers can choose between the online website and app or offline services through agents and direct in-person assistance.

CITIES:



Shield Insurance operates in five major cities across India: Delhi NCR, Indore, Mumbai, Hyderabad, and Chennai. These strategic locations ensure comprehensive coverage and accessibility for customers nationwide.

DATA SETS:



The dataset comprises five tables: Dim_Customer, Dim_Policies, Dim_Date, Fact_Premium, and Fact_Settlement, providing a comprehensive view of customers, policies, timeframes, premium transactions, and claim settlements. The data spans from November 2022 to April 2023, offering insights into a six-month operational period.



Let's dive in and
explore the
dashboard!





Shield Insurance Project



Home View

The home view serves as a central hub, offering a comprehensive overview that includes a general snapshot, sales mode analysis, and detailed age group insights.



General View

To gain a comprehensive overview of all the key metrics, including KPIs, revenue, performance, and customer segmentation.



Sales Mode Analysis View

An analysis based on sales modes, highlighting their effectiveness in driving revenue and expanding the customer base.



Age Group Analysis View

An analysis based on age groups to uncover valuable insights into annual settlements, customer trends, preferred policies, and sales modes



989M

LM: 835.5M (18.40%)

Total Revenue

5.47M

LM: 5.5M (-122.26%)

Daily Revenue Growth

27K

LM: 22.7K (18.28%)

Total Customers

148.29

LM: 0.2K (-132.11%)

Daily Customers Growth

Customers Segmentation

City	Age Group	Total Revenue	Total Customers
Chennai	18-24	4M	254
Chennai	25-30	7M	407
Chennai	31-40	35M	1196
Chennai	41-50	23M	598
Chennai	51-65	16M	286
Chennai	65+	21M	225
Delhi NCR	18-24	12M	896
Total		989M	26841

General View

Month Year

All

City

All

Age Group

All

Policy Id

All

Sales Mode

All

show revenue trend

show customer trend

Trend By Months



Revenue Split

city	Total Customers	Total Revenue
Chennai	2966	106M
Delhi NCR	11007	402M
Hyderabad	4340	161M
Indore	2096	81M
Total	26841	989M

Age Group Wise Split

age_group	Total Customers	Total Revenue
18-24	2241	31M
25-30	3411	62M
31-40	10976	336M
41-50	5252	210M
51-65	286	16M
65+	225	21M
Total	26841	989M

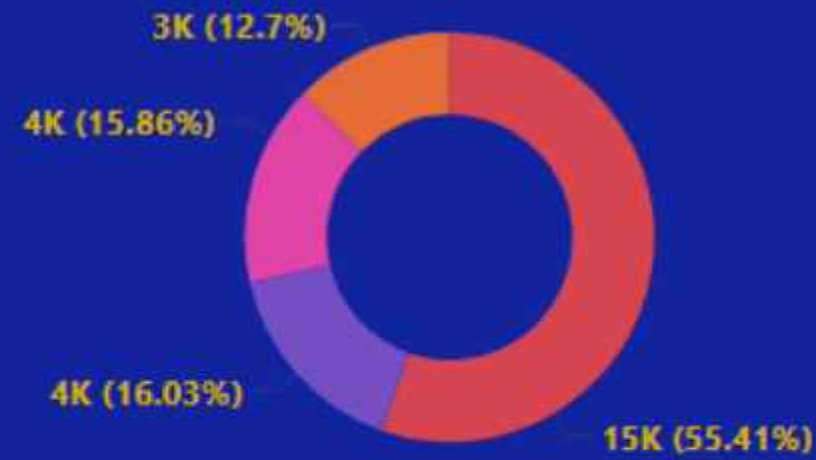
LM - Last Month

Sales Mode Analysis



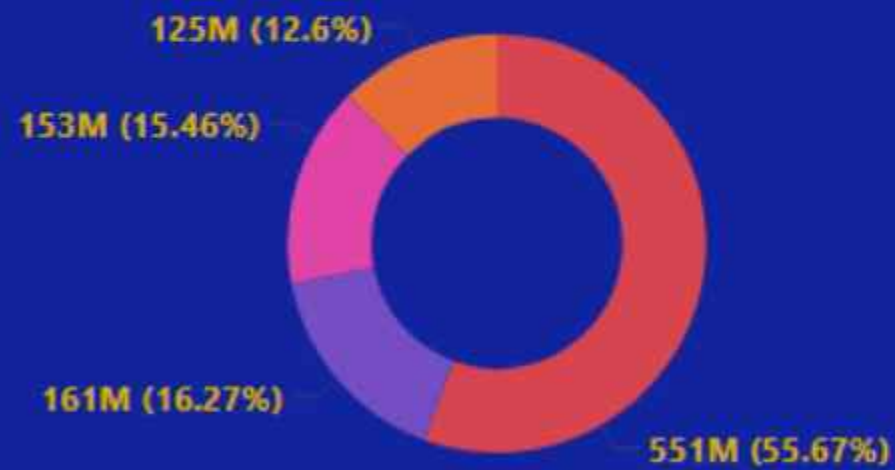
Total Customers By Sales Mode

Offline-Agent Online-App Offline-Direct Online-Website



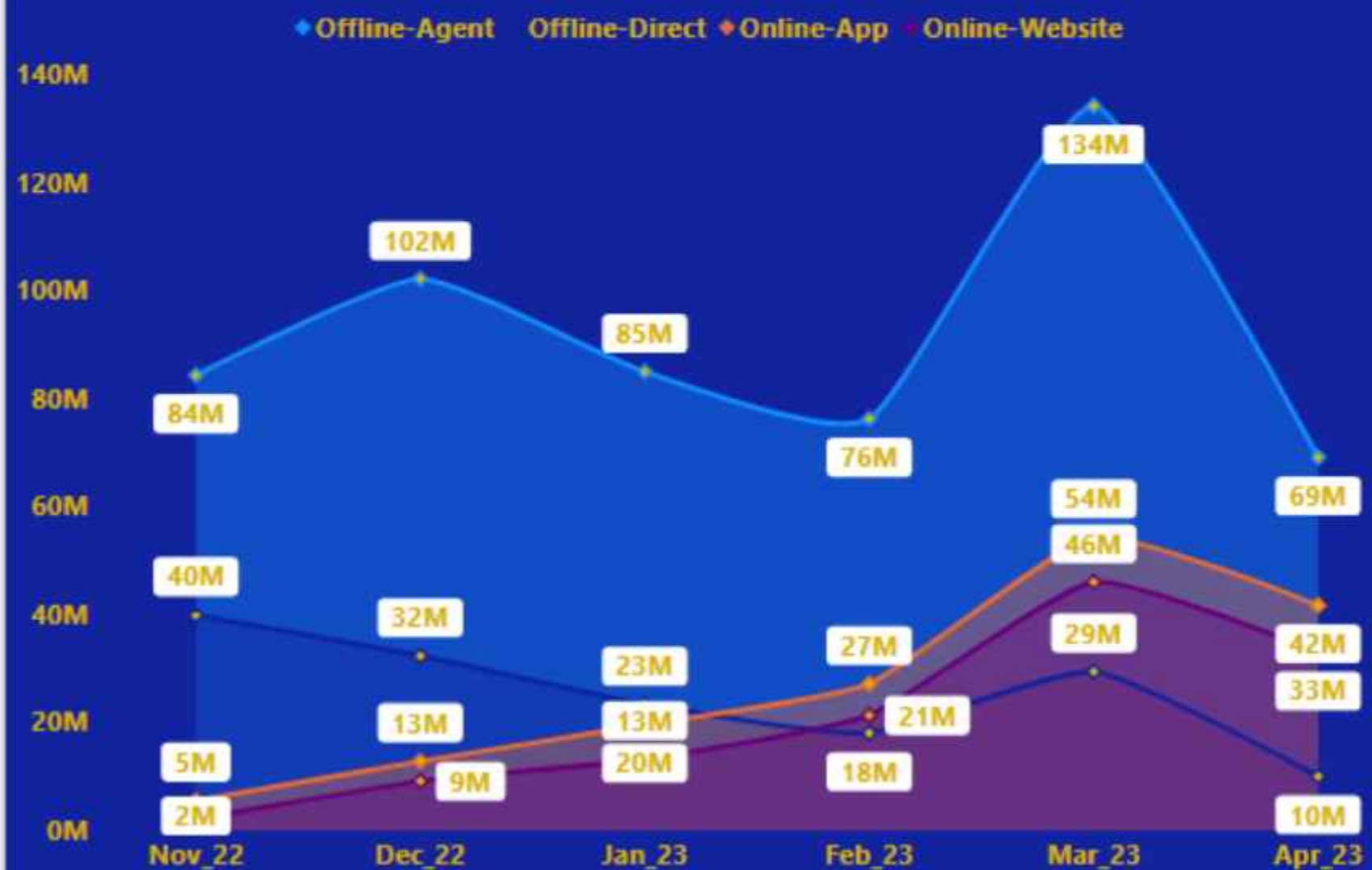
Total Revenue By Sales Mode

Offline-Agent Online-App Offline-Direct Online-Website



Month Year	City	Age Group	Policy Id	Sales Mode
All	All	All	All	All

Sales Mode Trend By Month



Age Group Analysis

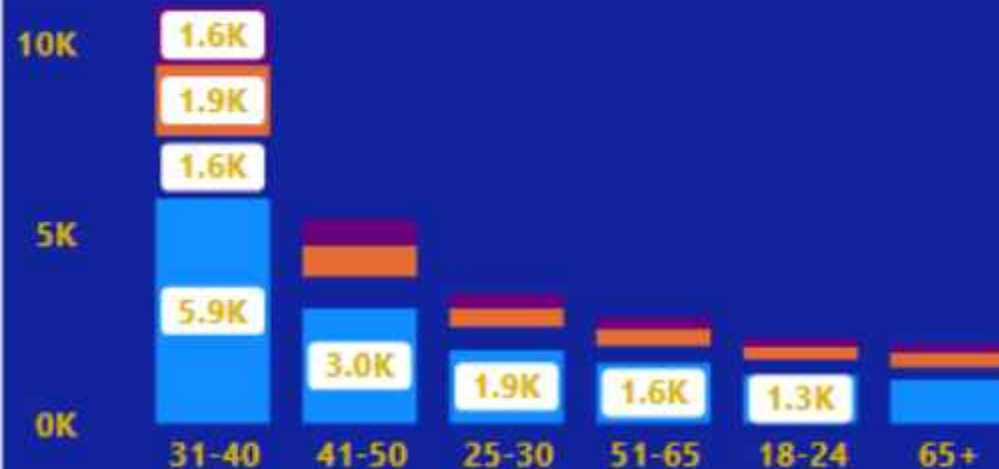


Age Group Vs Policy Preference

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL4321HEL	1044	1177	1447	453	209	104	4434
POL3309HEL	277	490	1944	707	287	124	3829
POL4331HEL	455	661	1687	591	207	134	3735
POL5319HEL	109	319	1511	861	361	168	3339
POL6303HEL	111	249	1297	823	381	156	3017
POL6093HEL	95	198	1050	670	326	204	2543
POL9221HEL	71	123	866	556	419	283	2318
POL2005HEL	30	82	545	351	258	502	1668
Total	2241	3411	10976	5352	2792	2069	26841

Age Group Vs Sales Mode

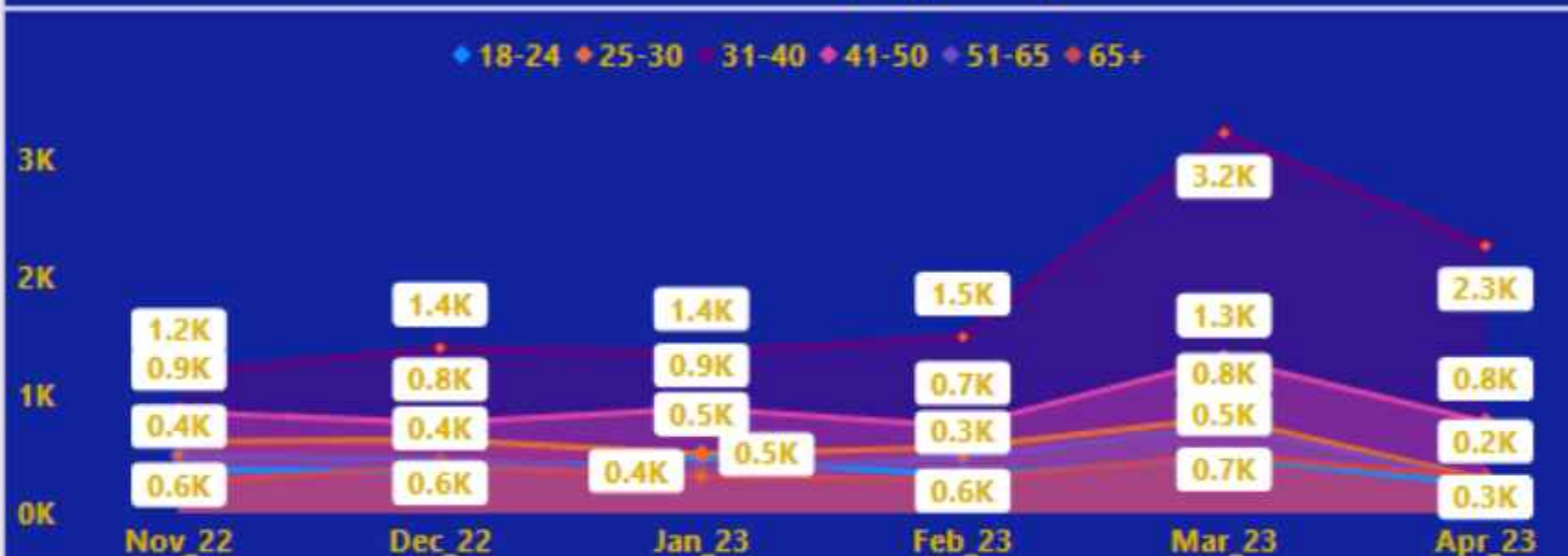
Offline-Agent Offline-Direct Online-App Online-Website



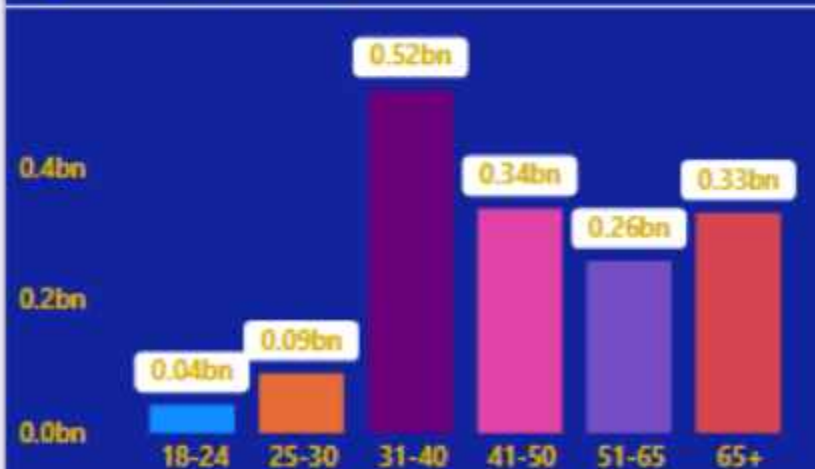
Month Year
City
Age Group
Policy Id
Sales Mode

All
All
All
All
All

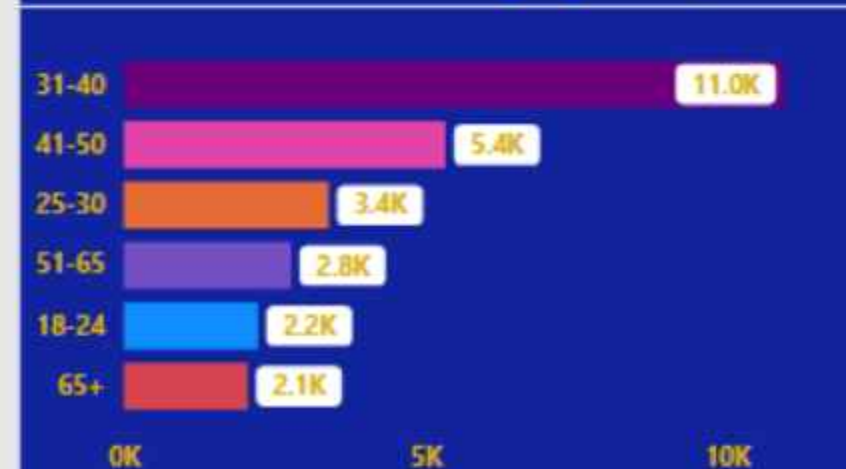
Customers Trend By Age Group



Age Group Vs Expected Settlement Amount



Total Customers By Age Group



INSIGHTS:

- **Revenue Surge in March 2023:** Achieved the highest revenue and customer acquisition during this period.
- **Delhi NCR Takes the Lead:** Emerged as the top-performing city, excelling in both revenue generation and customer acquisition.
- **Impactful Age Demographic:** The 31-40 age group drove significant growth in both revenue and customer base.
- **Top-Performing Sales Channel:** Offline-Agent sales mode attracted the largest customer base and delivered the highest revenue.
- **Online Growth Trends:** Revenue from the Online App and Website steadily increased from February 2023, while Offline-Direct sales declined.
- **Policy in High Demand:** Policy 'POL4321HEL,' with a base premium of ₹5,000/-, gained popularity with over 4,000 customers.
- **Preferred Age Bracket:** Customers aged 31-40 emerged as the dominant demographic across all policies.

RECOMMENDATIONS:



- **March Performance Insights:** Analyze the factors behind March's outstanding performance to identify replicable strategies for sustained success.
- **City-Specific Growth Strategies:** Apply effective tactics from Delhi NCR to drive balanced revenue growth across all cities.
- **Tailored Campaigns for Key Demographics:** Design customized marketing and policy offerings to maximize engagement with the 31-40 age group.
- **Optimizing Sales Channels:** Enhance the Offline-Direct mode by incorporating insights from the growth trends of the Online App and Website.
- **Policy Innovation:** Introduce variations of the popular 'POL4321HEL' policy to attract a diverse customer base across different demographics.

Thank You So
Much



Codebasics Virtual
Internship



Data Analyst
Intern at AtliQ
Technology