



SHIELD INSURANCE

Comprehensive Analysis for
Strategic Insights and Growth



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AGENDA



- **Company Overview**
- **Problem Statement**
- **Dashboard Presentation**
- **Key Insights**
- **Recommendations**

COMPANY OVERVIEW

Shield Insurance provides affordable and customizable insurance solutions tailored to individuals across all age groups.

With a strong presence in Mumbai, Chennai, Delhi, Hyderabad, and Indore, the company ensures accessibility through offline agents, direct sales teams, a mobile app, and a website.

It focuses on delivering seamless protection with a customer-centric approach.



PROBLEM STATEMENT

Shield Insurance seeks to enhance decision-making through a pilot project focused on delivering actionable insights.

KEY OBJECTIVES



CUSTOMER & REVENUE ANALYSIS

Analyze total customers, revenue, and daily growth rates with segmentation by city, age group, and sales mode.



TREND MONITORING

Monitor month-over-month policy trends and visualize customer and revenue growth.



SALES MODE & DEMOGRAPHICS

Create dedicated pages for sales mode and age group analysis to understand trends, preferences, and demographics.

DASHBOARD PRESENTATION



KEY INSIGHTS

2. REGIONAL PERFORMANCE

- Top City: Delhi NCR
- Lowest City: Indore

4. SALES CHANNELS

- Top Channel: Offline agents (55.67% revenue, 55.41% customers)

6. CLAIMS PATTERNS

- High Settlements: Customers aged 65+
- Low Settlements: Customers aged 18–30

1. REVENUE & GROWTH

- Highest Month: March 2023
- Lowest Month: November 2022

3. CUSTOMER DEMOGRAPHICS

- Dominant Group: 31–40 age group (highest revenue and customers)
- Low Revenue: 18–30 age groups

5. POLICY TRENDS

- Top Policy: POL2005HEL (highest revenue, 7.3% ownership)
- Underperformers: POL4321HEL & POL4331HEL (30.47% customers, 5.9% revenue)

RECOMMENDATIONS

- **Boost Regional Performance:** Address challenges in Indore with localized initiatives to drive growth in revenue and customer numbers.
- **Leverage Delhi NCR's Success:** Expand offerings in Delhi NCR by targeting younger and older demographics with tailored insurance plans.
- **Attract Younger Audiences:** Develop affordable, personalized policies to engage the 18–30 age group and increase their participation.
- **Enhance Digital Channels:** Invest in website improvements and run targeted digital campaigns to grow the online customer base.
- **Promote Top Policies:** Focus on marketing high-performing policies, such as POL2005HEL, to maximize revenue and customer acquisition.

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