What 's in this report?

The insurance dataset is about a large insurance company which are due to undergo an internal audit with regards to their complaint's procedure

*This report contains the complaint's historical analysis from 2018 to 2020 by dimensions, the complaint's status changes, client's satisfaction & brokers performances to get ready for the **Internal Audit.***

If anyone is interested in this dataset, you can click this statement for getting the dataset.

CONTENTS

This project is conducted by Nguyen Dang Vu with the instruction of MUDASSIR ALI from Enterprise DNA. All measures and dax calculation is written by Nguyen Dang Vu.
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This section looks at the general overview of the company clients and its composition, number of brokers, number of complaints, complaint handling day & market share.

1. General Overview

Number of complaints 2018-2020

5,554 Non Urgent

12 Urgent

Market Share by Region

Increasing customers with increasing population but the overall Market Share is very low i.e. 0.01%

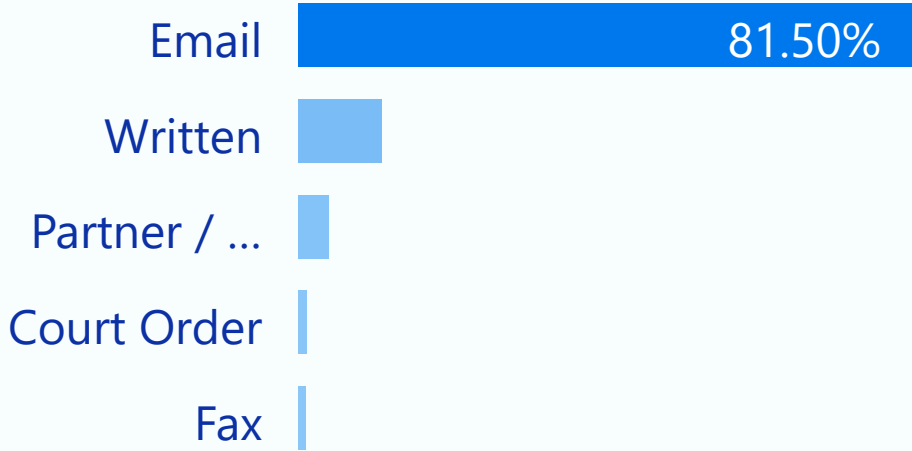|	
# of Clients	**12,305**
# of Brokers	**707**
# of Complaints	**5,566**
Reimbursements	**$35,379**
Satisfaction Level	**56.14%**
Day to Solve Complaint	**7.87**
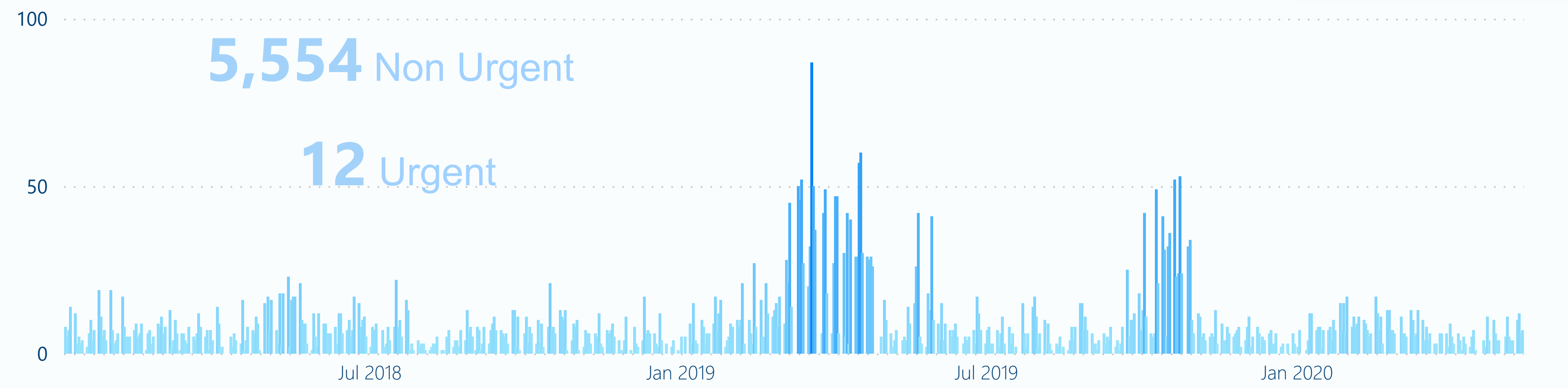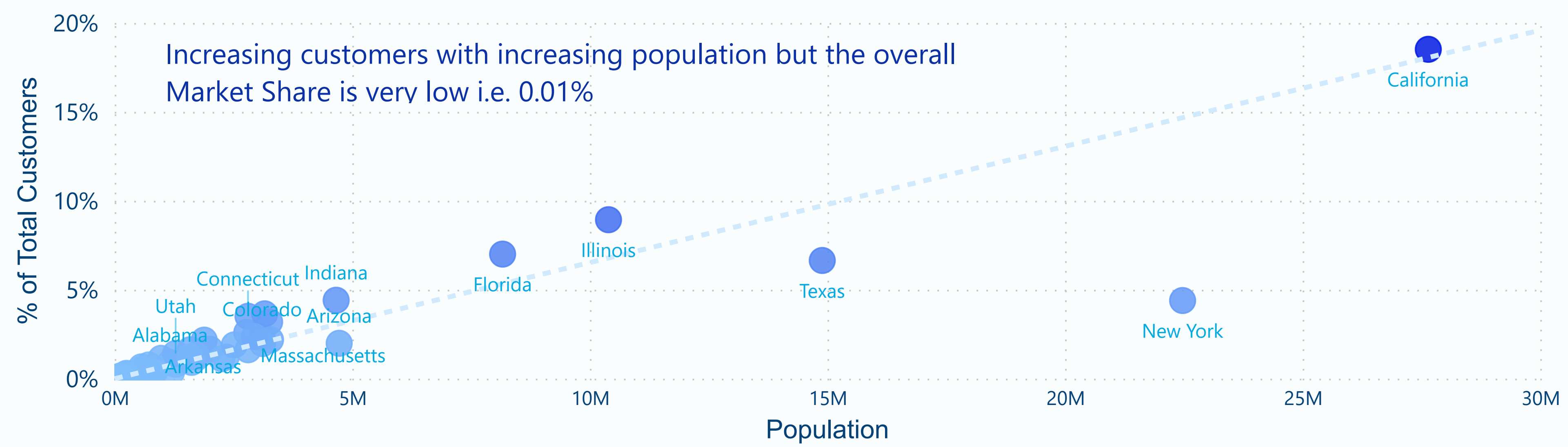
53% Male customers

45% Female Customers
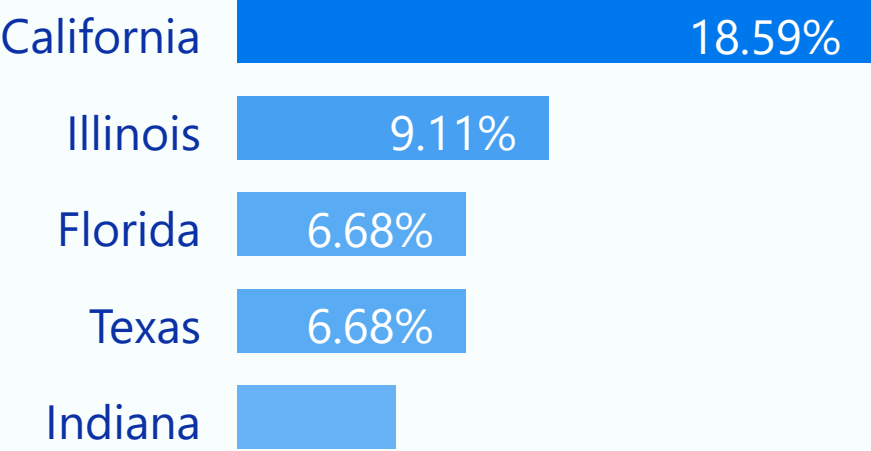
1.5% Other customers

2. Complaint Distribution

This section looks at distribution of complaints by sectors/location from 2018 to 2020. The report can be filter by States, Regions, Distribution Centers, Processing Portals and Product Category. **Bad performing sectors/locations can be identified for improvements.**
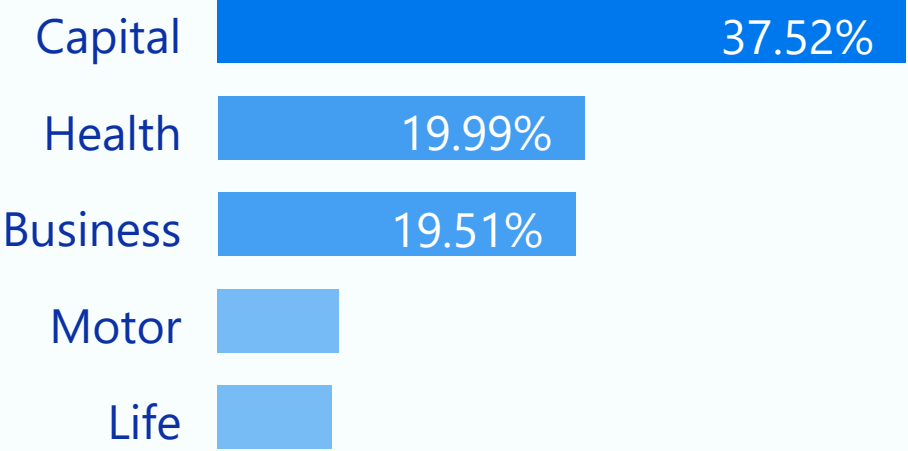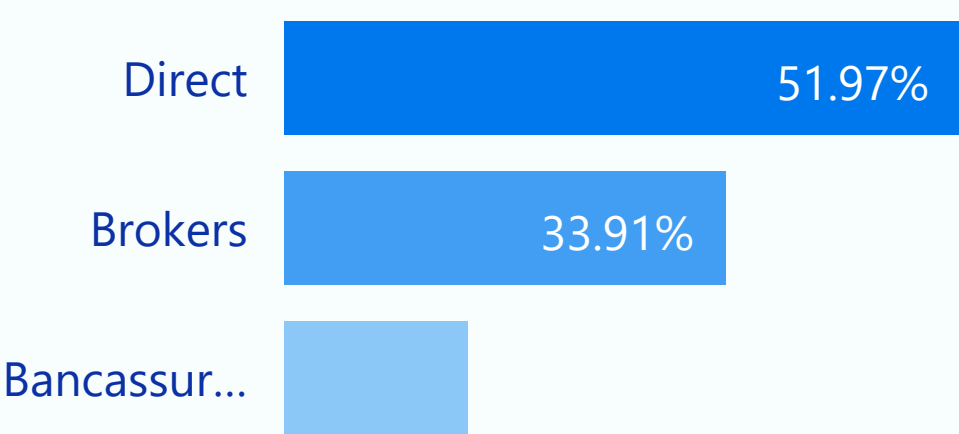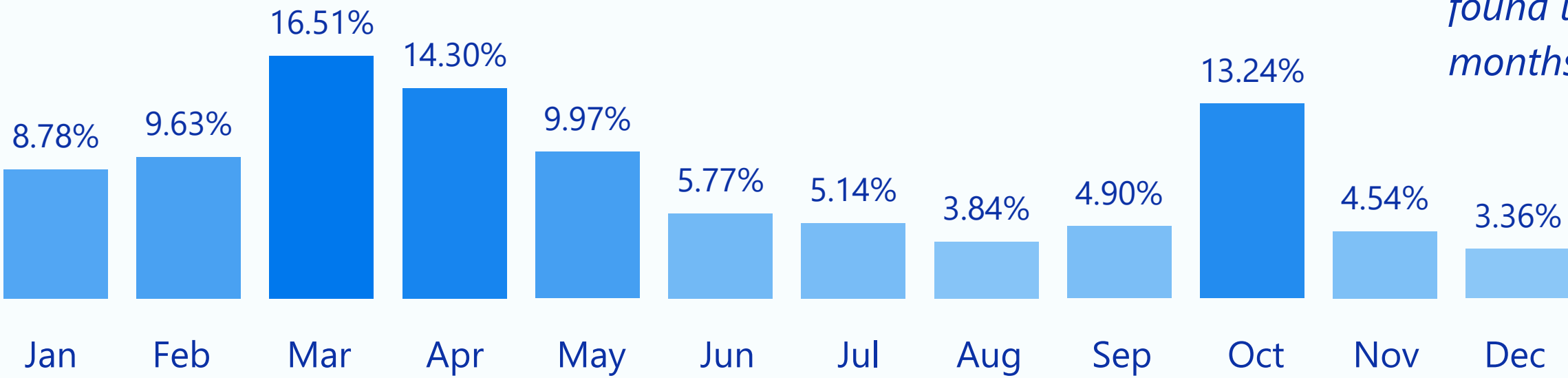
Complaints Processing Portals

Email	81.50%
Written	
Partner / ...	
Court Order	
Fax	

States

California	18.59%
Illinois	9.11%
Florida	6.68%
Texas	6.68%
Indiana	

Product Category

Capital	37.52%
Health	19.99%
Business	19.51%
Motor	
Life	

Distribution Centers

Direct	51.97%
Brokers	33.91%
Bancassur...	

Percentage of Complain by Month

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
8.78%	9.63%	16.51%	14.30%	9.97%	5.77%	5.14%	3.84%	4.90%	13.24%	4.54%	3.36%

Highest number of claims are found in Mar, Apr & Oct months

Year

2018
- Midwest
- Northeas
- South
- West

2019
- Midwest
- Northeas
- South
- West

2020
- Midwest
- Northeas
- South
- West
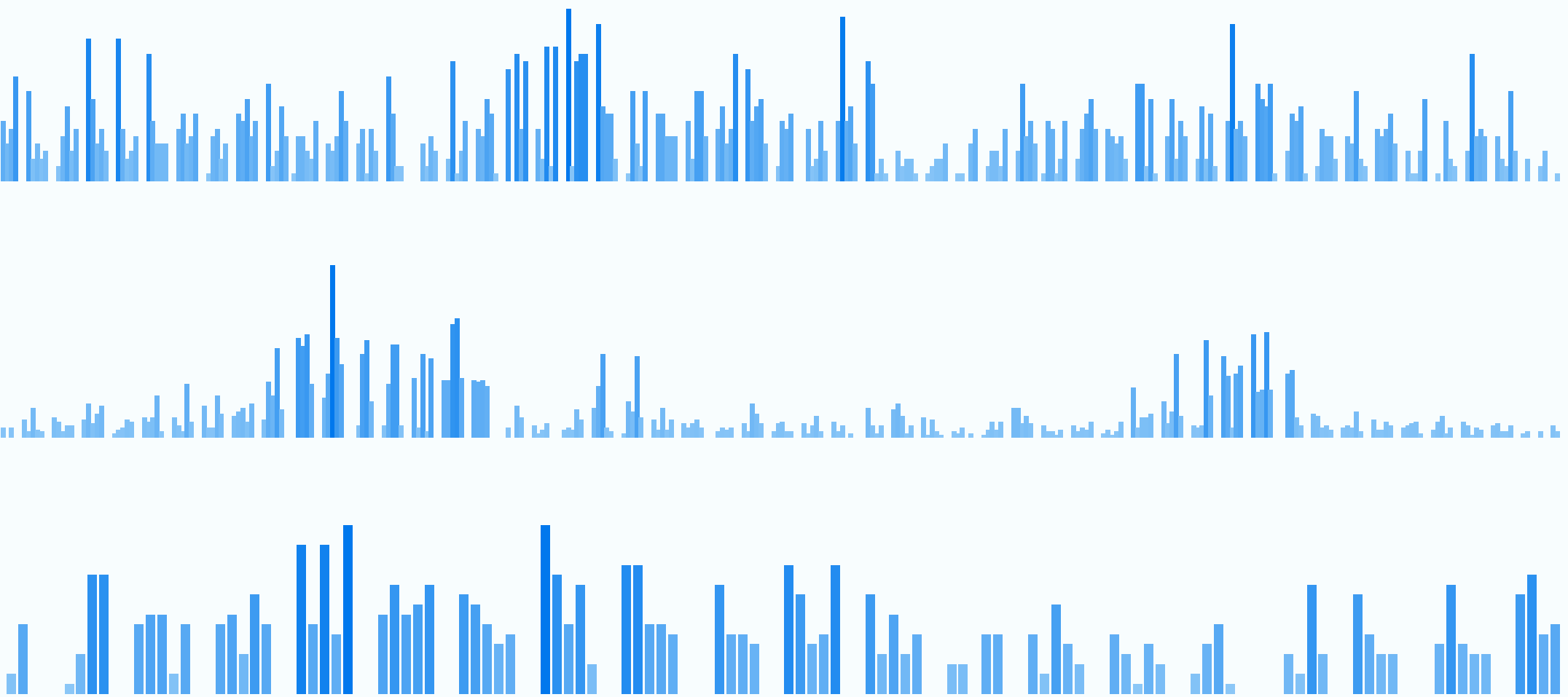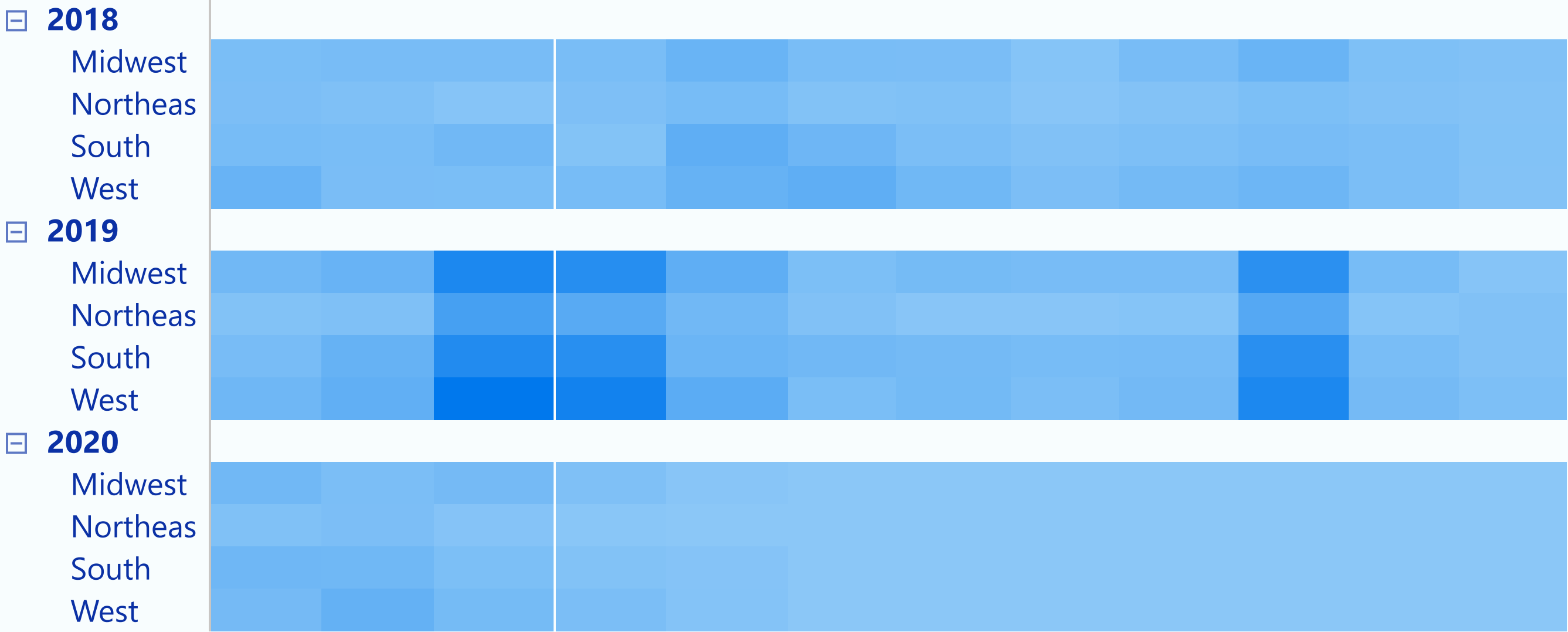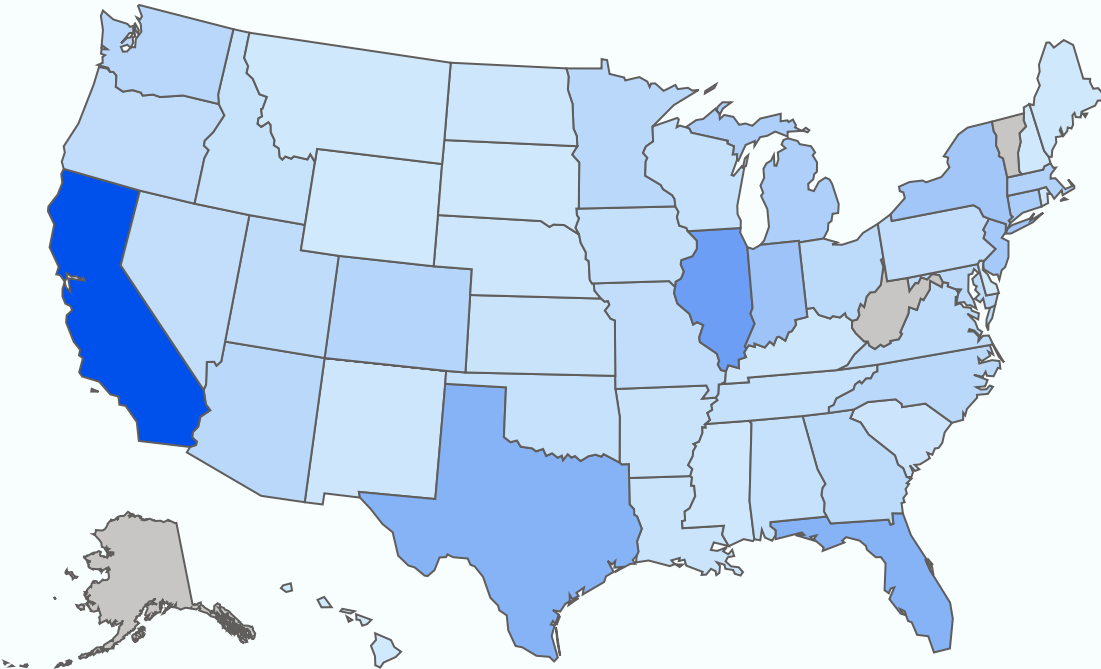
| Midwest | Northeast | South | West |

3. Complaint Handling Day

This section looks at the average number of days taken to resolve complaints by sectors/location from 2018 to 2020. The report can be filter by Brokers, Regions, Distribution Chanels, Processing Portals and Business Units. **Bad performing sectors/locations can be identified for improvements.**

Complaints Processing Portals

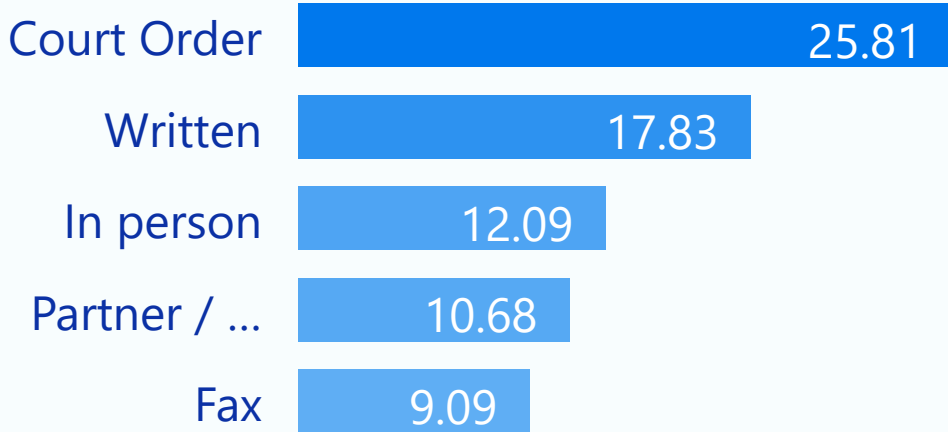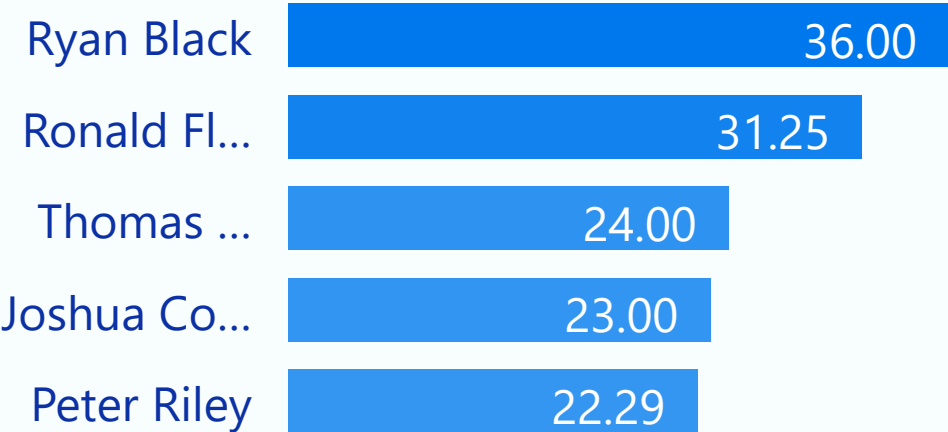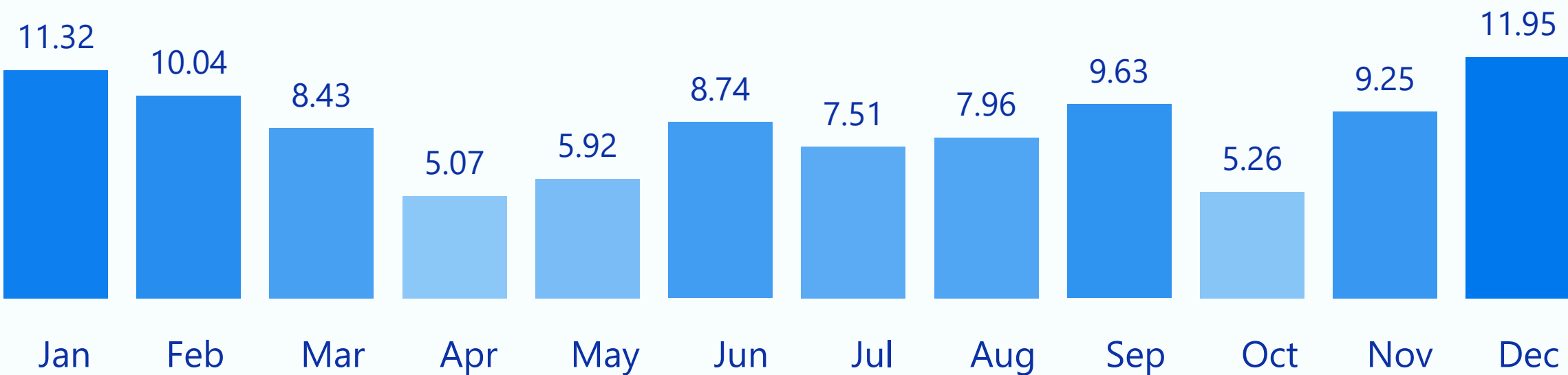|	
Court Order	25.81
Written	17.83
In person	12.09
Partner / ...	10.68
Fax	9.09

Distribution Centers

MKG	8.40
CDW	8.25
Headquar...	8.10
CSU	8.02
Tele sales	7.98

Product Category

Other	9.08
Health	8.29
Property	7.98
Capital	7.97
Motor	7.94

Brokers

Ryan Black	36.00
Ronald Fl...	31.25
Thomas ...	24.00
Joshua Co...	23.00
Peter Riley	22.29

Average Day to Solve Complaints by Month

Month	Value
Jan	11.32
Feb	10.04
Mar	8.43
Apr	5.07
May	5.92
Jun	8.74
Jul	7.51
Aug	7.96
Sep	9.63
Oct	5.26
Nov	9.25
Dec	11.95

1st & 2nd Quarter take the highest time to resolve the complaints.

Year	
2018	Midwest / Northeast / South / West
2019	Midwest / Northeast / South / West
2020	Midwest / Northeast / South / West

Midwest	Northeast	South	West
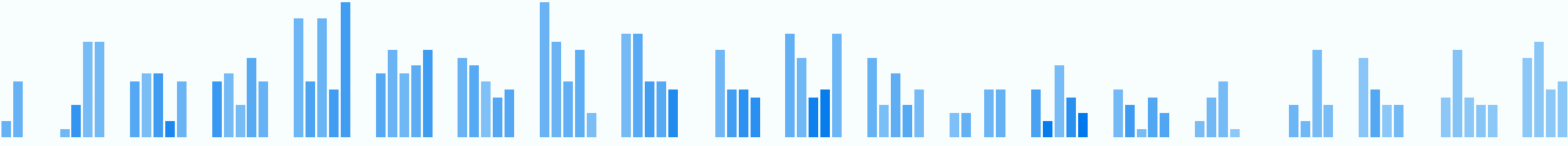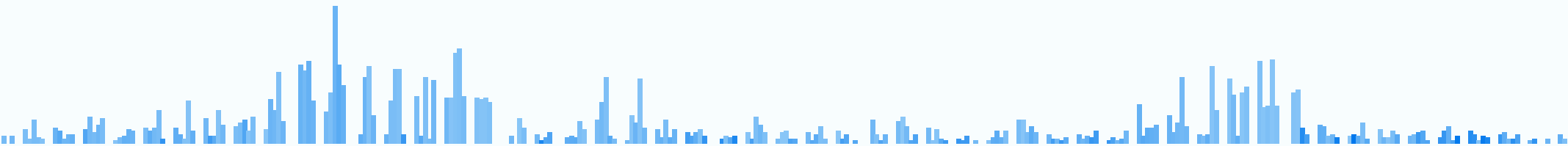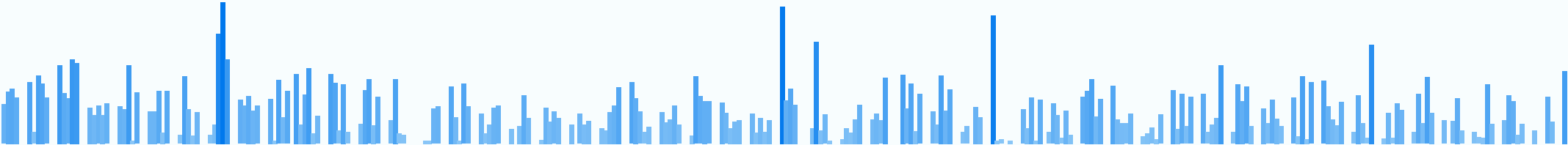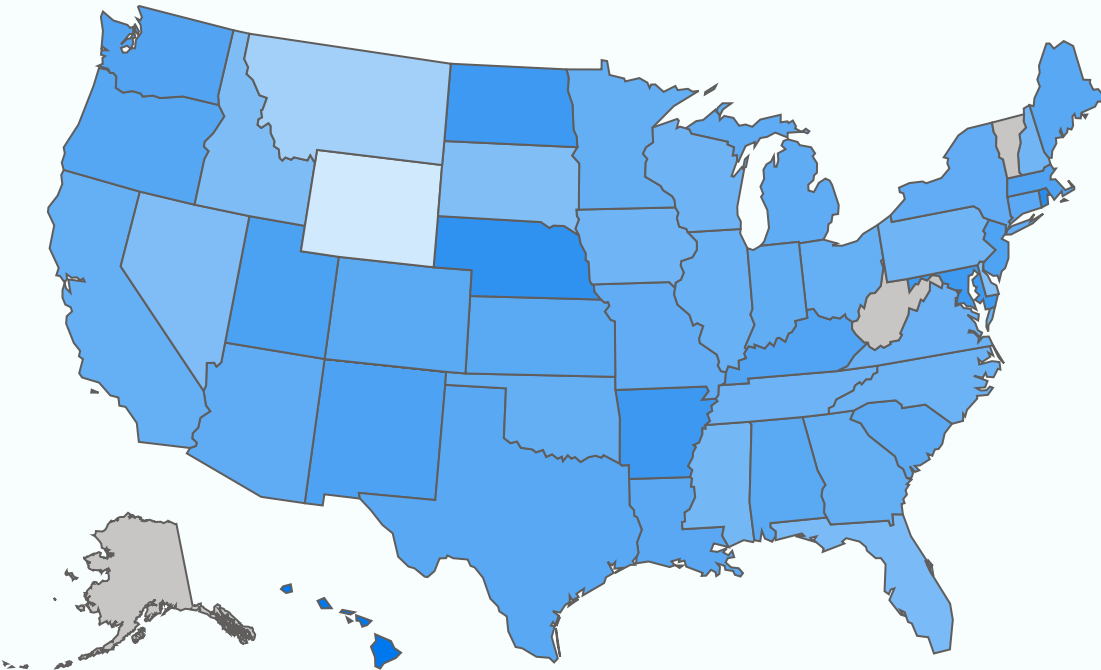
4. Complaint Status

Customer Name	Broker Name	State	Region
All ⌄	All ⌄	All ⌄	All ⌄

Average Day Spent Along the Complaints Processing Status

	OUTSTANDING	NEW	IN PROGRESS	ASSIGNED TO	PENDING	CLOSED
	0.19	0.03	11.43	2.39	24.00	5.18
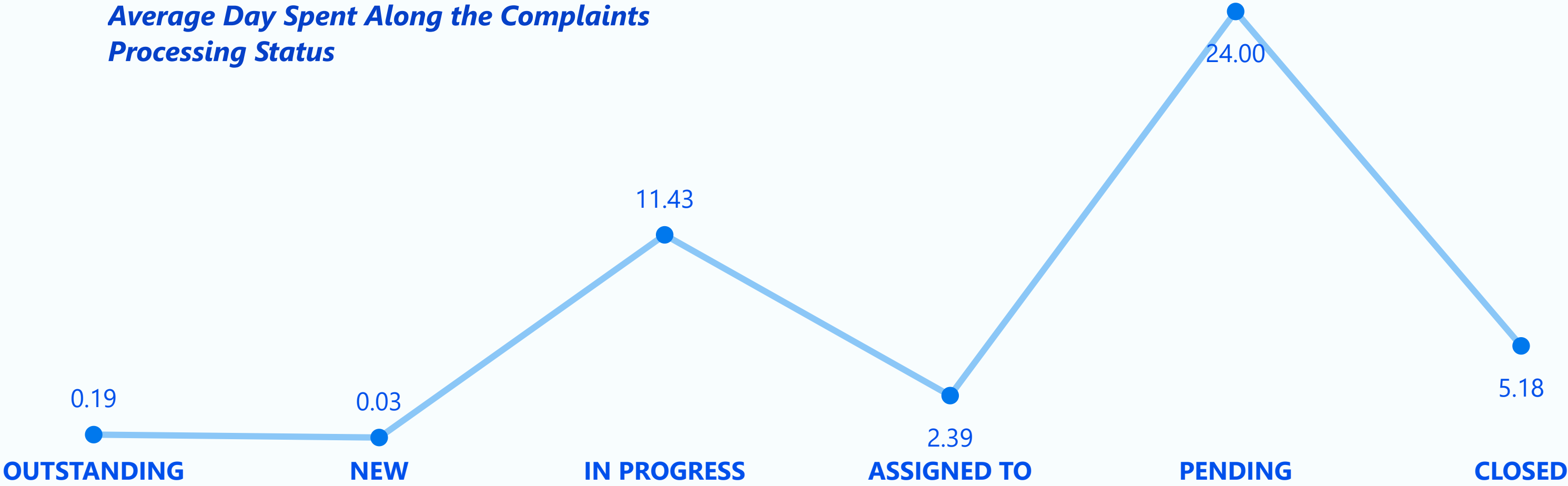
Broke ID	Broker Name	Product	Description	Customer Name	Status Days
10052	Louis Rivera	PNM-002	Company HQ	Freeman Joshua	3
10053	Justin Lawson	HOC-053	Company HQ	Ray Brian	41
10083	Keith White	BNM-034	Company HQ	Romero Helen	15
10090	Matthew Young	HOC-047	Company HQ	Carter Kevin	61
10101	Justin Gardner	BNM-062	Company HQ	Bryant Brenda	6
10104	Peter Hunter	CAP-024	Company HQ	Taylor Justin	3
10106	James Reid	CAP-026	Company HQ	Moore Sara	26
10108	Brian Davis	LOL-046	Company HQ	Ross Scott	6
10117	Victor Myers	CAS-075	Company HQ	Warren Denise	10
10119	Martin Franklin	CAP-025	Company HQ	Alexander Juan	13

Closed Complaints

i.e **99.08%** of Total
Complaints ~ **5516**
Average Status Days ~ **5.18**

Open Complaints

50

New Complaints

i.e **0.23%** of Total
Complaints ~ **13**
Average Status Days ~ **0.03**

In-Progress Complaints

i.e **0.23%** of Total
Complaints **13**
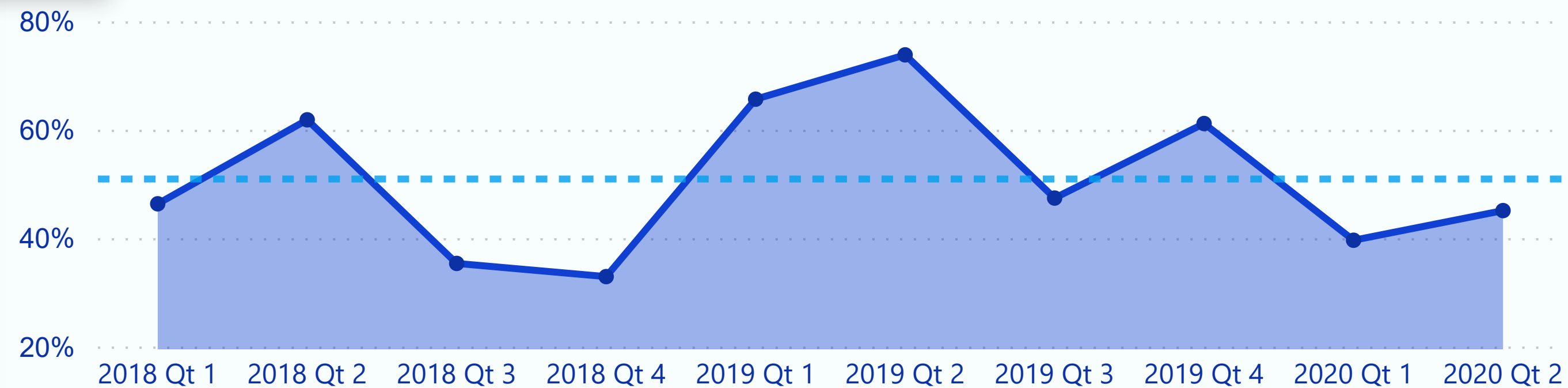Average Status Days ~ **11.43**

Assigned Complaints

i.e **0.29%** of Total
Complaints ~ **16**
Average Status Days ~ **2.39**

Outstanding Complaints

i.e **0.14%** of Total
Complaints **8**
Average Status Days ~ **0.19**

5. Clients Satisfaction Survey
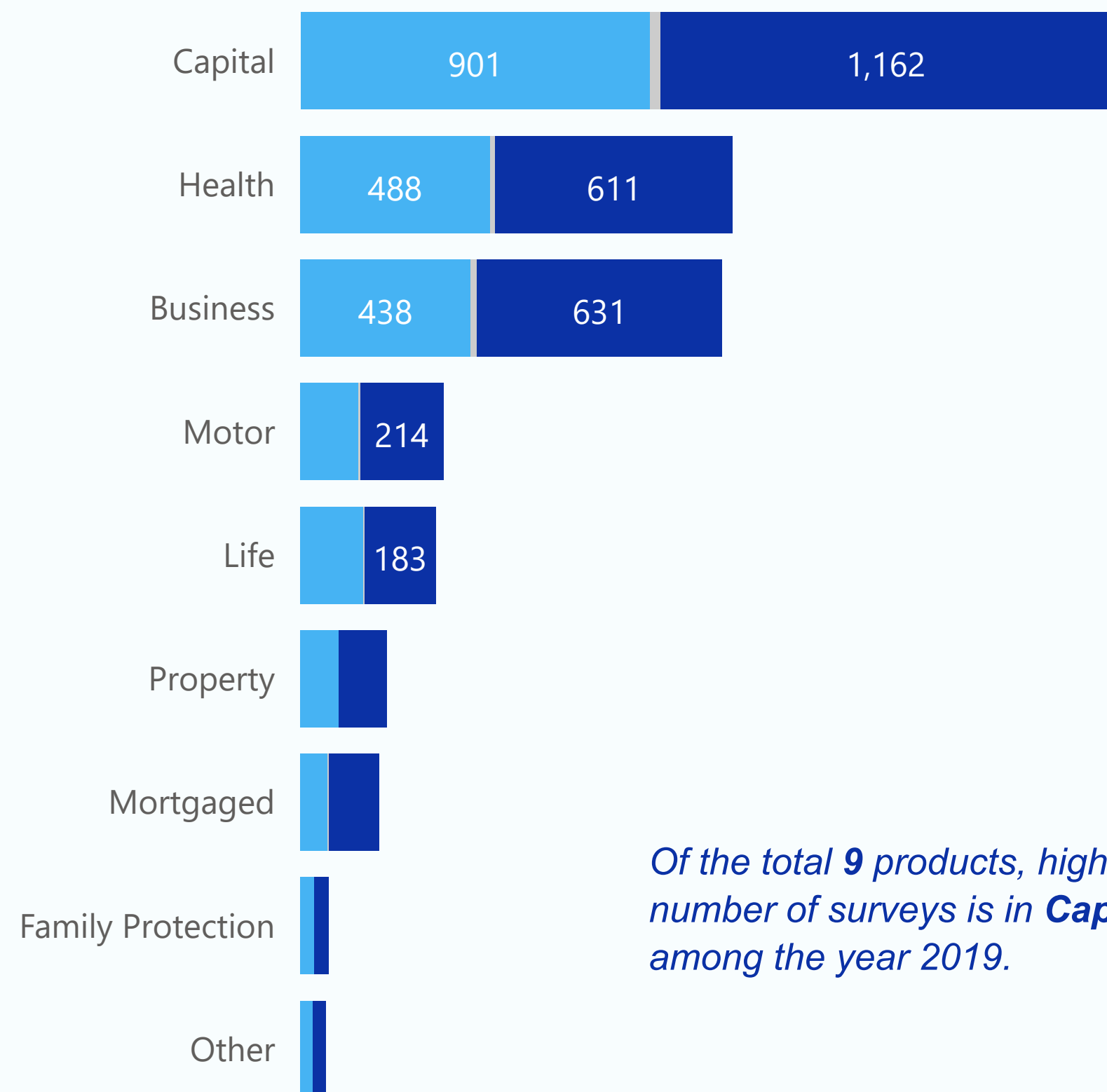
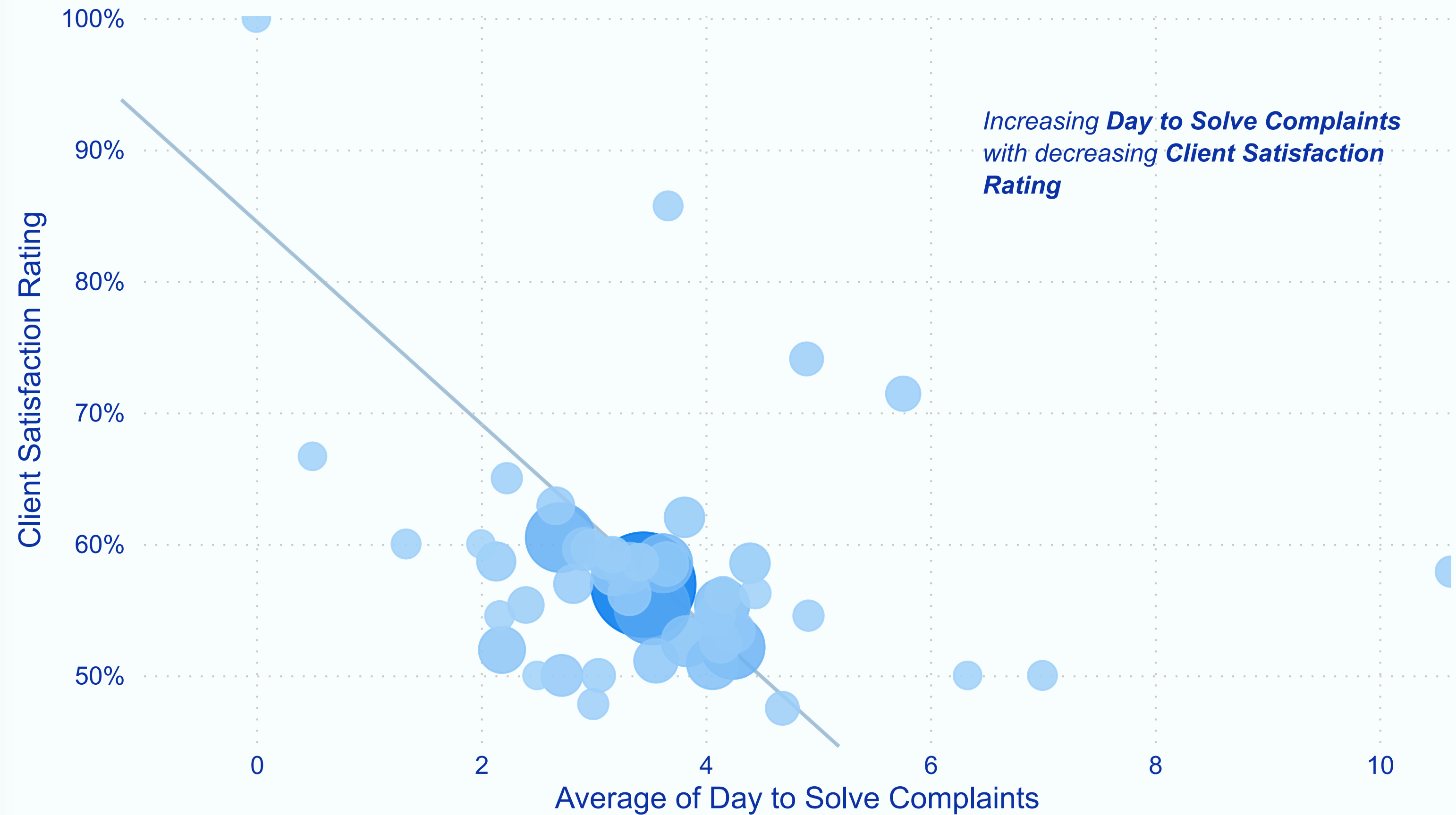## Rating of Client Satisfaction Over Times

3,125 Satisfied

2,375 Survey N/A

66 Not Satisfied

Client Satisfaction by Product

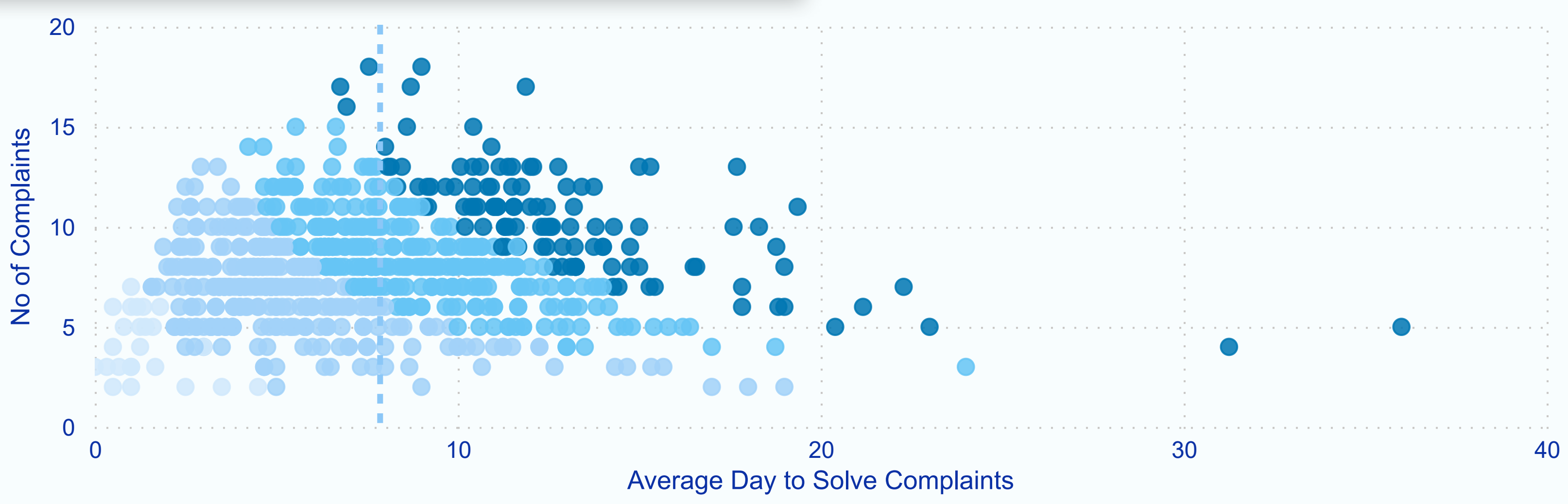| Product	Value 1	Value 2
Capital	901	1,162
Health	488	611
Business	438	631
Motor		214
Life		183
Property		
Mortgaged		
Family Protection		
Other		

*Of the total **9** products, highest number of surveys is in **Capital** and among the year 2019.*

Client Satisfaction Rating by Region

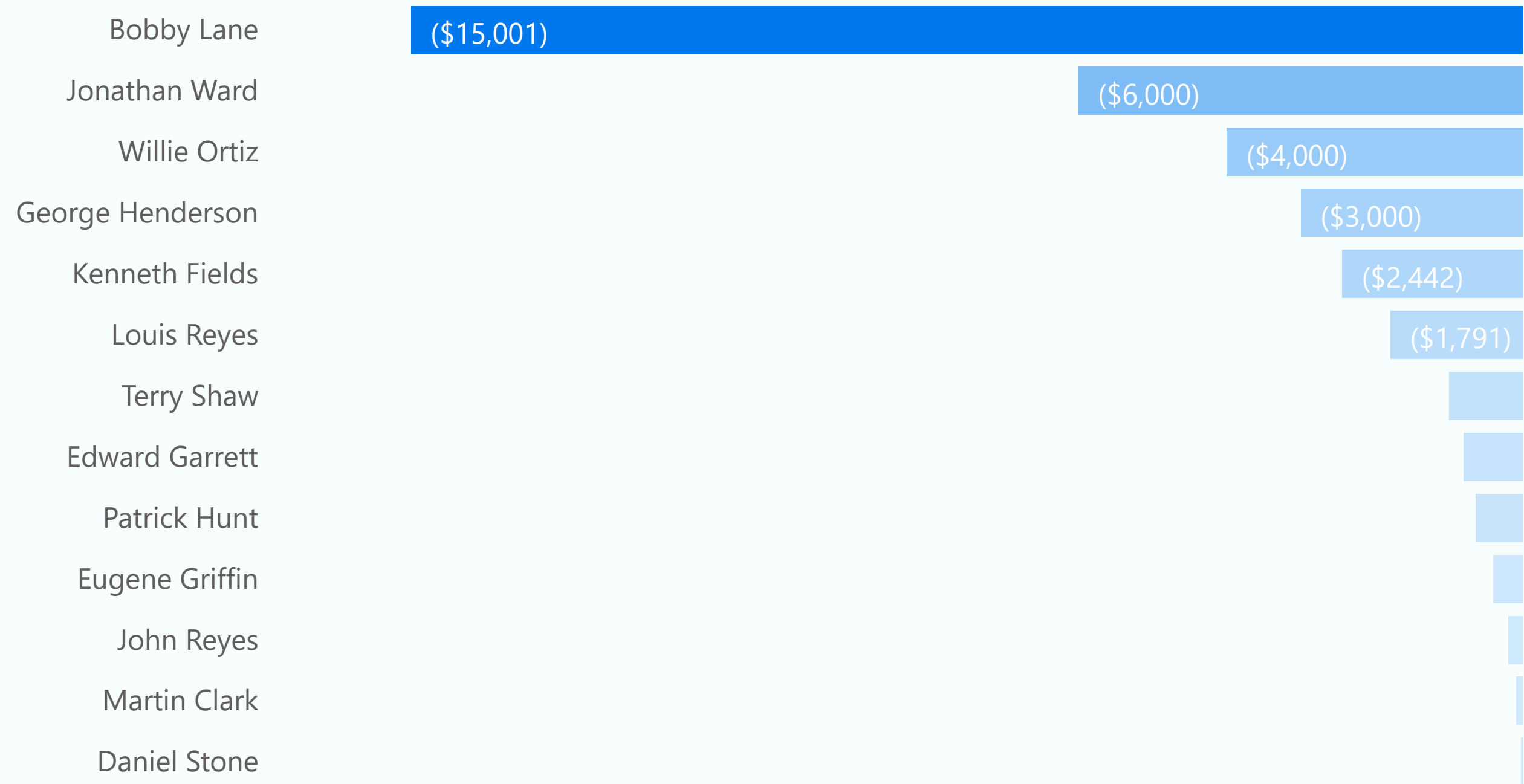*Increasing **Day to Solve Complaints** with decreasing **Client Satisfaction Rating***

Client Satisfaction Rating

Average of Day to Solve Complaints

6. Brokers Performance Measurement

111 Poor Performers

276 Avg Performers

295 Best Performers

24 Top Performers

Expected Reimbursements classified by Brokers

Broker	Value
Bobby Lane	($15,001)
Jonathan Ward	($6,000)
Willie Ortiz	($4,000)
George Henderson	($3,000)
Kenneth Fields	($2,442)
Louis Reyes	($1,791)
Terry Shaw	
Edward Garrett	
Patrick Hunt	
Eugene Griffin	
John Reyes	
Martin Clark	
Daniel Stone	

Average Day to Solve Complaints by Brokers
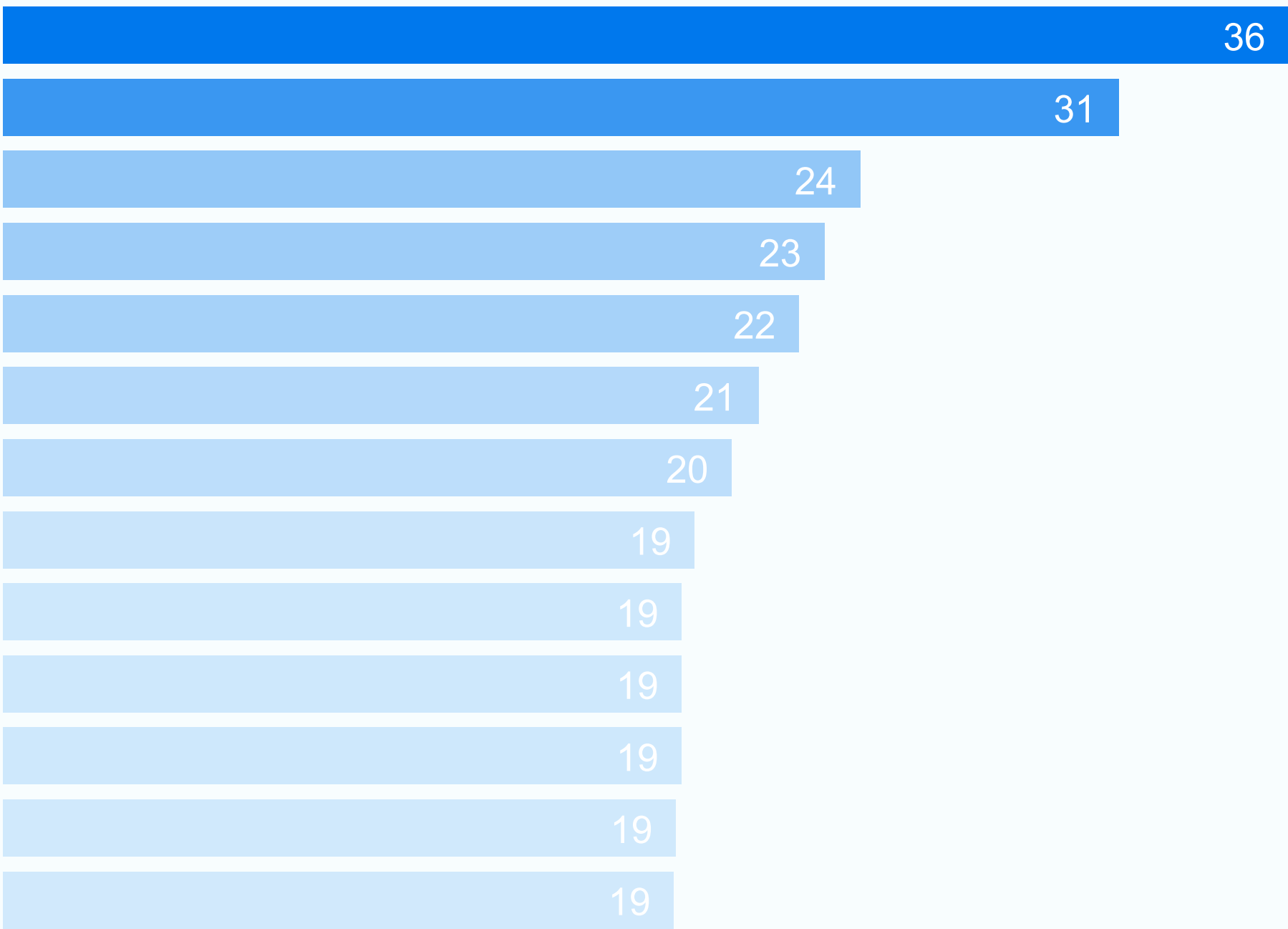
Broker	Value
Ryan Black	36
Ronald Flores	31
Thomas Martinez	24
Joshua Cooper	23
Peter Riley	22
Jose Burns	21
Raymond Collins	20
Earl Stewart	19
Antonio Sullivan	19
Bruce Edwards	19
Larry Marshall	19
Clarence Fox	19
Kenneth Morris	19

Problems identified

*Highest number of complaints are in the **West region,** where most of the complaints are in 2019. Every year, **March, April & October** has highest number of complaints.*

*Highest days taken to solve complaint are in the **Northeast region,** where most of the days taken are in 2018. Every year, **Jan, Feb & Dec** takes the highest time.*

*Client's satisfaction seems reasonable. However, **majority of the survey data is not obtained** to correctly conclude the client's satisfaction.*

*Majority of the broker **are taking more than the average time** to solve the complaints.*

Date
December 24, 2022