



# Shield Insurance

Secure Today. Sure Tomorrow.



# AGENDA

---

- About the company.
- Problem Statement.
- Dataset & Data Model Overview.
- Dashboard Overview.
- Key Insights.
- Recommendations.



# About the Company



# ABOUT THE COMPANY

---



## Best Insurance Services

**Shield Insurance is a rapidly growing insurance provider in India, offering high-quality and customer-focused services. With a focus on customer satisfaction and feedback, the company serves all age groups with tailored insurance solutions. Known for its trust, innovation, and commitment to excellence, Shield Insurance continues to set new benchmarks in the industry.**



# WE SERVE IN 5 MAJOR CITIES

**Shield Insurance is available in 5 major cities across India. It concentrates on reliability and improve growth.**



**Delhi:** Serving a diverse customer base in the capital region.



**Mumbai:** Delivering fast, reliable services in the financial hub.



**Hyderabad:** Supporting families and professionals in a tech-driven city.



**Chennai:** Ensuring quality insurance for the coastal metro.



**Indore:** Reaching growing communities in central India.





# SALES MODE

**Shield Insurance follows 4 different models or channels to reach customers and offer services.**



**Offline Agent** – Trained agents personally assist customers with policy selection and purchase offline.



**Offline Direct** – Customers can directly walk into our branch offices to buy insurance without intermediaries.



**Online Website** – Users can explore and purchase insurance plans conveniently through our official website.



**Online App** – Our mobile app allows customers to buy, manage, and renew policies anytime, anywhere.



# Problem Statement



# PROBLEM STATEMENT

---

**Shield Insurance, a fast-growing company, wants to improve its decision-making process by adapting data-driven strategies.**

**To achieve this, they have partnered with AtliQ Technologies for a pilot project focused on creating impactful dashboards and reports.**

**Shield has shared a portion of their business data to test the effectiveness of this approach.**

**The goal is to turn raw data into actionable insights that support future growth. If the pilot proves successful, Shield plans to extend the collaboration for larger projects.**

**The challenge is to ensure these reports truly aid in smarter, faster decisions.**



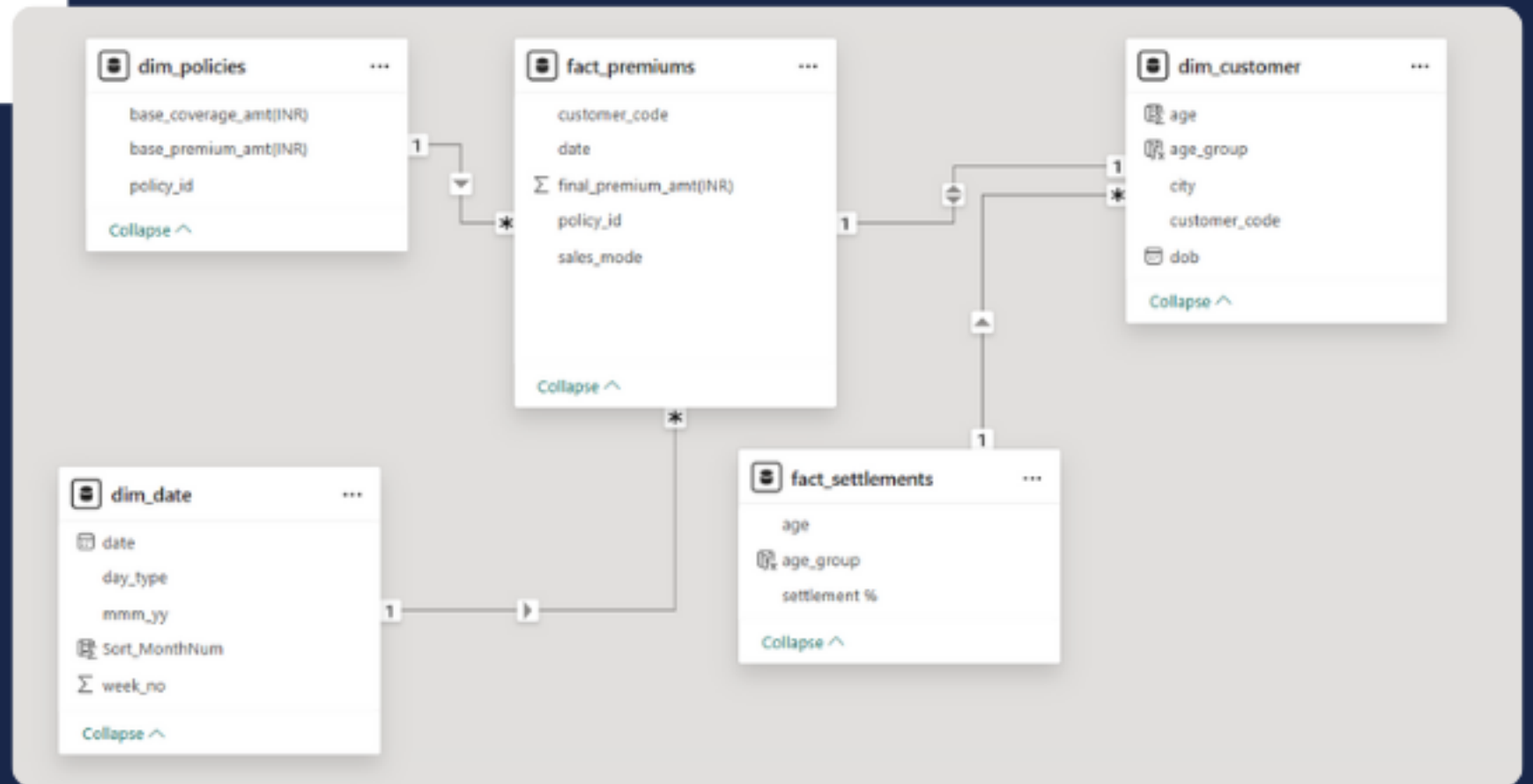


# Dataset Overview



# DATASET & DATA MODEL

dim\_date.  
dim\_customer.  
dim\_policies.  
fact\_premiums.  
fact\_settlements





# Dashboard Overview



Secure Today. Sure Tomorrow.

## Shield Insurance Analysis



### General View

Explore key insights on customer activity and revenue, including total stats, daily growth, and trends.

[View](#)



### Sales Mode Analysis

Dive into revenue by sales channel, compare online vs. offline sales and track trends over time.

[View](#)



### Age Group Analysis

Gain insights into age-wise trends in revenue, customers, settlements, and top-selling policies.

[View](#)









# Shield Insurance Analysis



Home



General View



Sales Mode Analysis



Age Group Analysis

FILTERS

CLEAR FILTERS

Policy ID

All

Month

All

City

All

Age Group

All

Week No.

All

Sales Mode

All

Abbreviations:  
LM = Last Month.  
% Δ = Percentage Change.

Note: Values are in Millions (₹)

Designed by: Yogesh Kurane

Total Revenue

989.25M

LM (Blank)  
% Δ 0.00%

Total Sales

26.84K

LM (Blank)  
% Δ 0.00%

Total Online Sales

7.71K

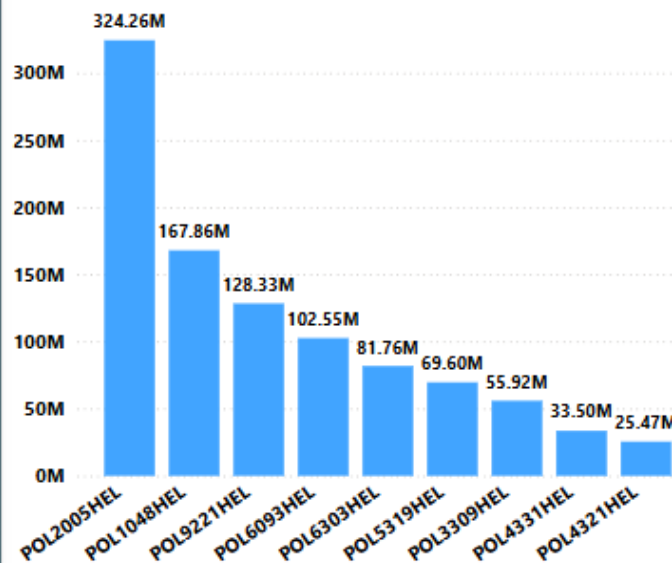
LM (Blank)  
% Δ 0.00%

Total Offline Sales

19.13K

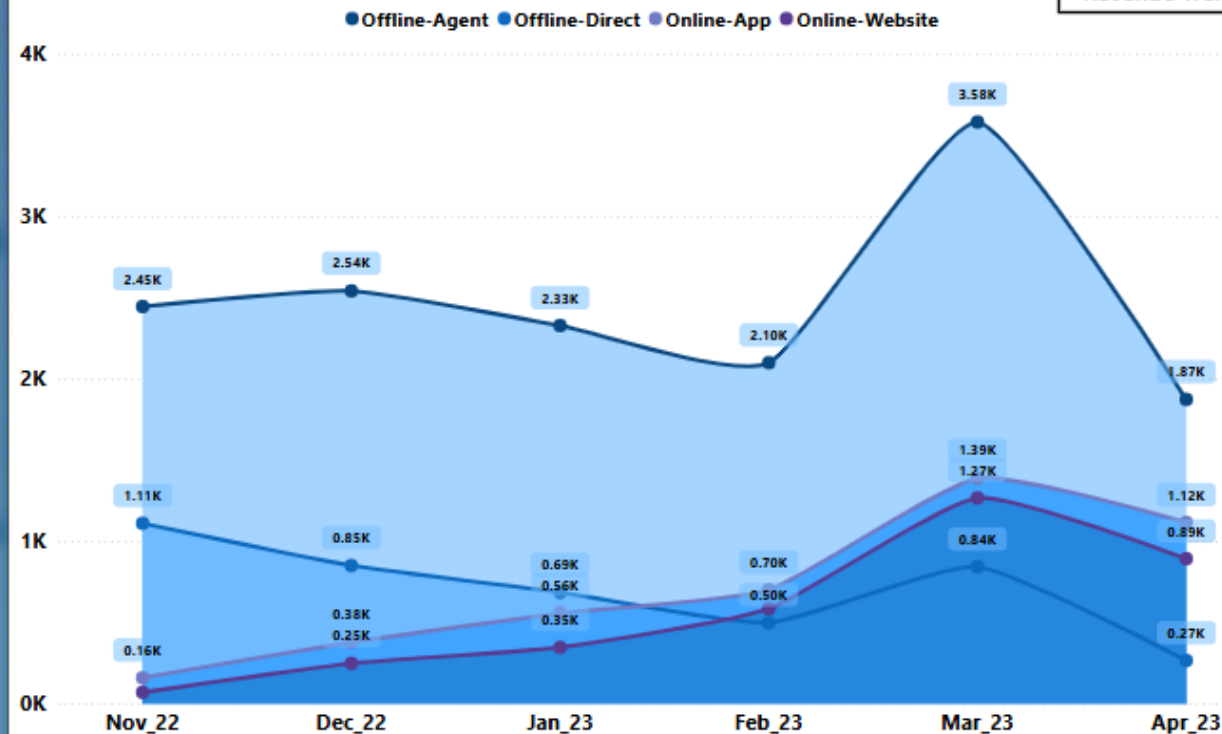
LM (Blank)  
% Δ 0.00%

Revenue by Policies



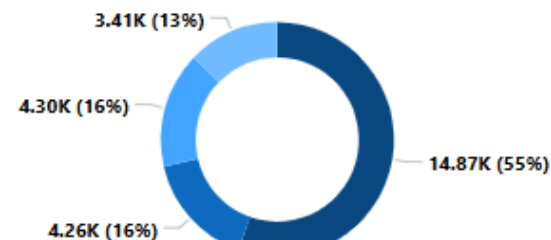
Customers Trend by Month & Year

Revenue Trend



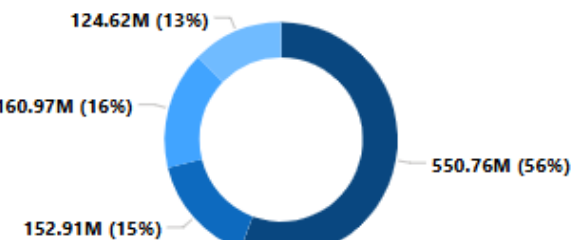
Total Customers Split by Sales Mode


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



Total Revenue Split % by Sales Mode

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



 FILTERS

CLEAR FILTERS

Policy ID

All

Month

All

City

All

Age Group

All

Week No.

All

Sales Mode

All

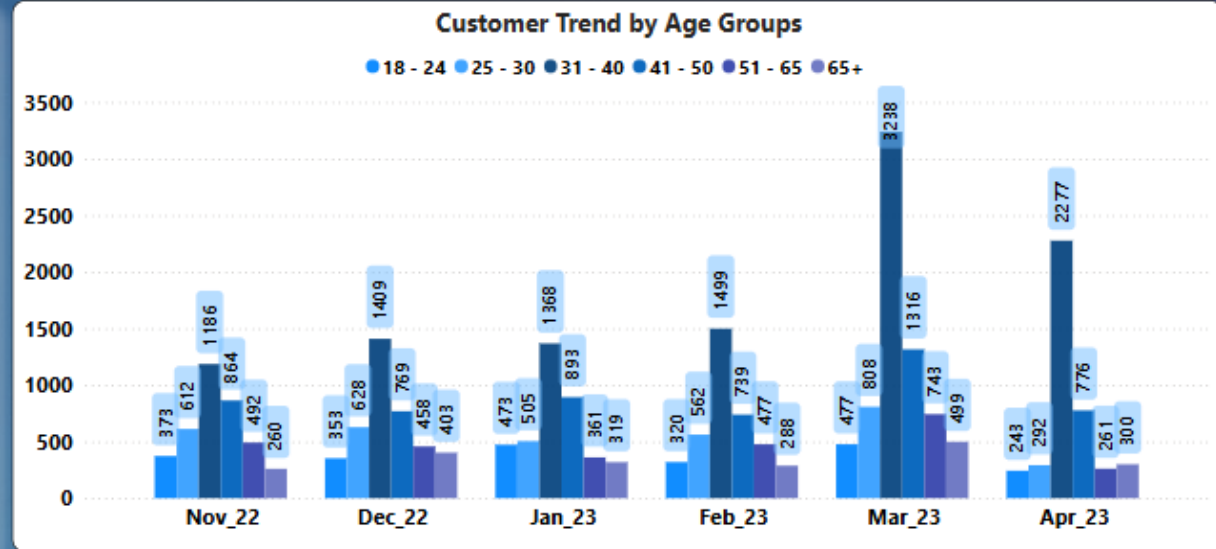
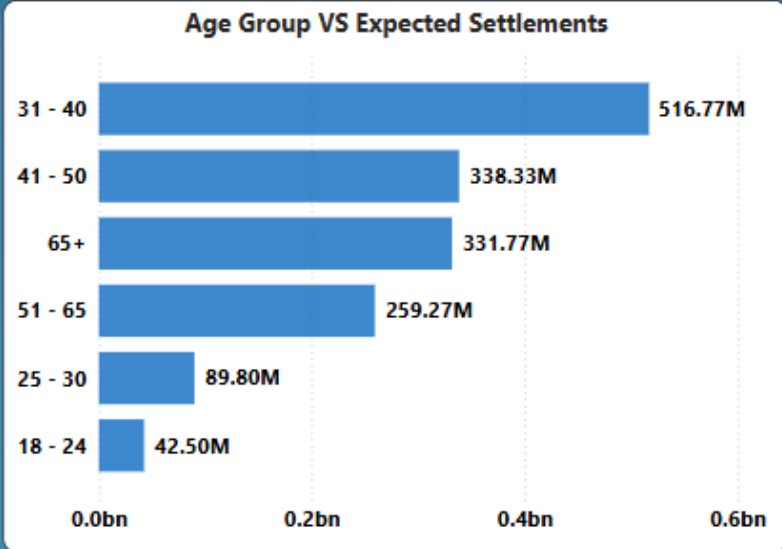
Abbreviations:

LM = Last Month.

% Δ = Percentage Change.

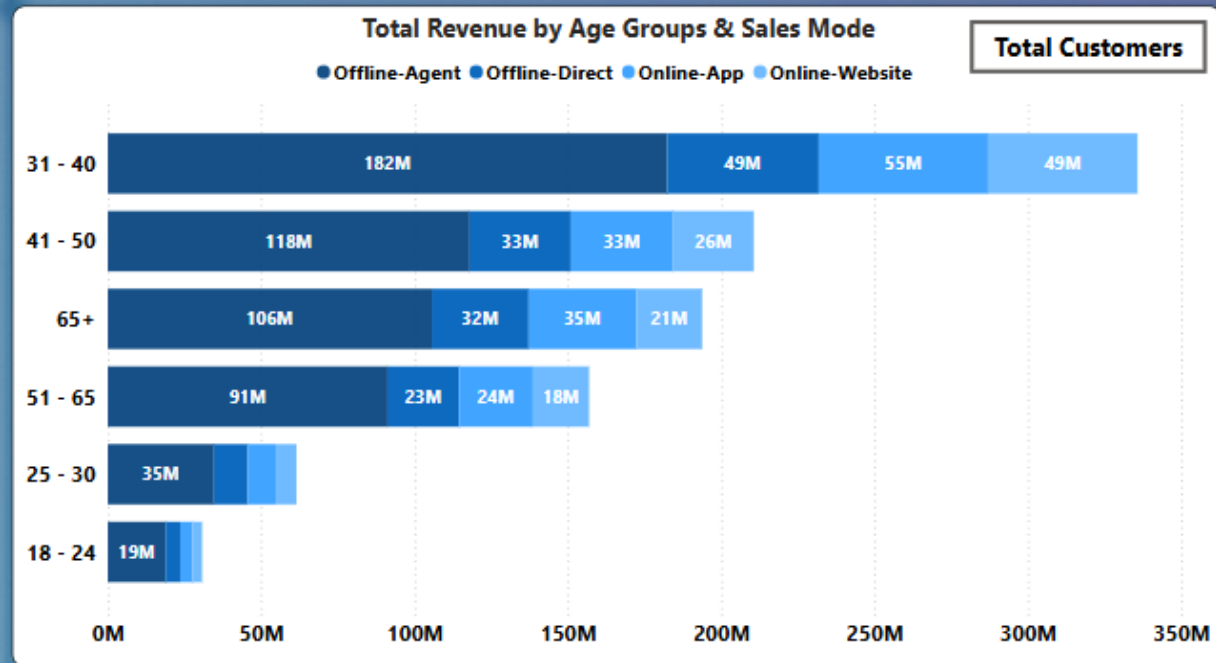
Note: Values are in Millions (₹)

Designed by: Yogesh Kurane



### Age Group VS Policy Preference

Policy ID	18 - 24	25 - 30	31 - 40	41 - 50	51 - 65	65 +
POL9221HEL	3.09M	5.60M	44.10M	31.15M	25.46M	18.95M
POL6303HEL	2.44M	5.75M	33.46M	23.24M	11.60M	5.27M
POL6093HEL	3.10M	6.70M	39.92M	27.85M	14.68M	10.29M
POL5319HEL	1.87M	5.70M	30.23M	18.84M	8.54M	4.43M
POL4331HEL	3.51M	5.31M	15.14M	5.76M	2.20M	1.59M
POL4321HEL	5.36M	6.29M	8.60M	2.91M	1.49M	0.82M
POL3309HEL	3.40M	6.32M	27.99M	11.01M	4.87M	2.33M
Total	30.74M	61.50M	335.72M	210.60M	156.92M	193.77M





# Key Insights & Details



# KEY INSIGHTS & DETAILS

- **Revenue:** Rs. 989M total; highest from Delhi NCR (Rs. 401M), Mumbai (Rs. 240M), lowest Indore (Rs. 83M).
- **Customer count:** ~27,000 total; highest in Delhi (11,000), Mumbai (6,432), lowest in Indore (2,096).
- **DCG:** Highest in March (64%), lowest in April (-39%), negative in Jan (-3%).
- **DRG:** Highest in March (67%), lowest in April (-39%), negative in Jan (-10%).
- **Revenue by sales mode:** Offline-Agent (56%), Online-App (16%), Offline-Direct (15%), Online-Website (13%).
- **Customer split by mode:** Offline-Agent (55%), Online-App & Offline-Direct (16%), Online-Website (13%).
- **Top policies by revenue:** POL2005HEL (Rs. 324M), POL1048HEL (Rs. 168M), POL4321HEL (Rs. 25M).
- **Revenue by age group:** 31–40 highest (Rs. 335M), 41–50 (Rs. 210M), 18–24 lowest (Rs. 19M).
- **Settlement amount by age:** Highest in 31–40, then 41–50, third 65+, lowest in 18–24.





# Recommendations





# RECOMMENDATIONS

---

- **Strengthen high-performing regions – Focus more on Delhi NCR and Mumbai to maximize returns.**
- **Revive underperforming cities – Target Indore with local campaigns and strategic partnerships.**
- **Address growth volatility – Analyze and act on April's decline to stabilize DCG and DRG trends.**
- **Scale Offline-Agent model – Expand and empower this top-performing sales channel.**
- **Boost digital channels – Improve app and website experience to increase online customer share.**
- **Target high-value age groups – Prioritize 31–50 segment with personalized offers and marketing.**
- **Push top policies, fix weak ones – Promote best-selling policies and rethink low performers.**
- **Use customer referrals & analytics – Encourage referrals in strong markets and optimize actions using growth data.**





# Thank You

Email: [yogeshkurane.work@gmail.com](mailto:yogeshkurane.work@gmail.com)

LinkedIn: [Yogesh Kurane](#)