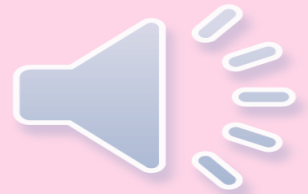


# SHIELD INSURANCE PERFORMANCE ANALYSIS REPORT



**CREATED BY - Dr. AJAY SINGH CHAUHAN**

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# Project Overview :

My role as a Medical Data Analyst Intern involved engaging with our client, Shield Insurance, to understand their needs, analyze data, and create a user-friendly smart dashboard. The goal was to empower Shield Insurance with valuable business insights for informed decision making

## About Company :

Shield Insurance is renowned for offering comprehensive coverage, protecting individuals from life's uncertainties. Their commitment to reliable coverage sets them apart in the industry



Shield Insurance provides a diverse range of 9 policies, catering to the needs of customers through both online platforms such as the website and app, as well as offline channels facilitated by agents and direct services. The sales operations are strategically spread across major cities including Delhi, NCR, Indore, Chennai, Mumbai, and Hyderabad.

## POLICES AND SALES :

This extensive array of policies ensures that customers have a variety of options to choose from based on their individual requirements.

The convenience of online transactions via the website and app offers a modern and efficient way for clients to explore and purchase policies from the comfort of their homes

# Policies Overview

Policy ID	Premium
POL4321HEL	5000
POL4331HEL	7500
POL3309HEL	12000
POL5319HEL	16700
POL6303HEL	21500
POL6093HEL	31700
POL9221HEL	42500
POL1048HEL	76500
POL2005HEL	120000

POL4321HEL	5000
POL4331HEL	7500
POL3309HEL	12000
POL5319HEL	16700
POL6303HEL	21500
POL6093HEL	31700
POL9221HEL	42500
POL1048HEL	76500
POL2005HEL	120000

# BASIC OBSERVATIONS



Total Revenue  
: 989.25  
millions INR

Total Customer  
Base :  
26,841

Customer's Age  
Groups :  
18- 65+

The company has 2 sales modes with 2 categories  
within each mode.

Offline Mode

Sales Agent

Direct Sale

Online Mode

Application

Websites

**Dash Board Overview :** The dashboard is organized into four distinct pages, each serving a specific purpose to enhance user experience and provide comprehensive insights. Let's delve into the details of each section:



# SHIELD INSURANCE



## HOME

Home page gives Access to Different pages , also gives a quick overview and guide to navigate through Different pages



## GENERAL VIEW

General view provides a comprehensive view of key performance indicators, trends, and critical metrics, enabling quick insights into overall business health.



## SALES MODE ANALYSIS

It Gives sales performance and insights across different modes of operation.



## AGE GROUP ANALYSIS

Gives insights into customer demographics and purchasing behavior based on age groups.

TOTAL CUSTOMER

26841

TOTAL REVENUE

989M

DRG

4.39M✓

Goal: (Blank) (+Infinity%)

DCG

126.23✓

Goal: (Blank) (+Infinity%)

CURRENT MONTH CUSTOMER

3787✓

Goal: (Blank) (+Infinity%)

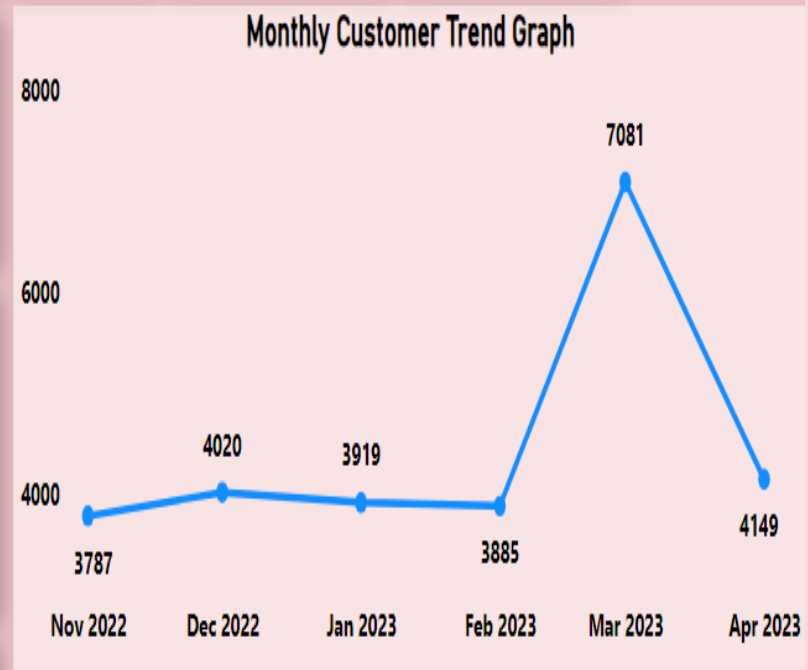
CURRENT MONTH REVENUE

132M✓

Goal: (Blank) (+Infinity%)

city	total_customer	total revenue
Delhi NCR	11007	402M
Mumbai	6432	240M
Hyderabad	4340	161M
Chennai	2966	106M
Indore	2096	81M
Total	26841	989M

age_group	total_customer	total revenue
31-40	11354	351M
41-50	4830	199M
25-30	3559	67M
51-65	2579	151M
18-24	2576	35M
65+	1943	186M
Total	26841	989M



Customer Segmentation by City and Age Group

city	total_customer	total revenue
Chennai	2966	106M
Delhi NCR	11007	402M
Hyderabad	4340	161M
Indore	2096	81M
Mumbai	6432	240M
Total	26841	989M

# GENERAL VIEW INSIGHTS

Delhi NCR leads in Revenue and Customer Acquisition Among all the cities, with a total of 11,007 Customers and 402 M Revenue

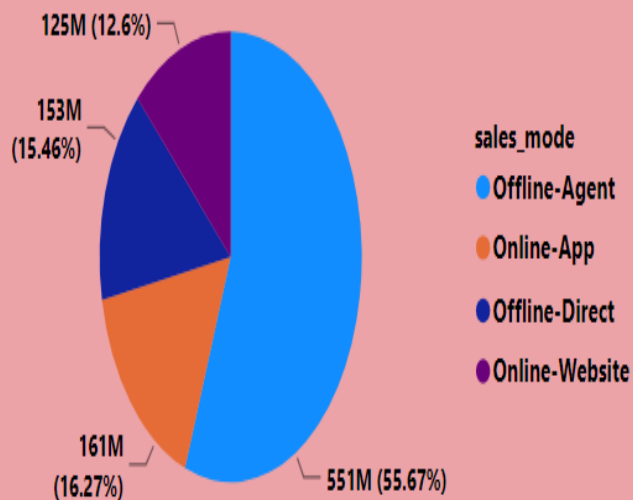
The Highest Revenue-Generating month is March with 264 Millions

The Highest Customer Acquisition month is March with 7081 Customers

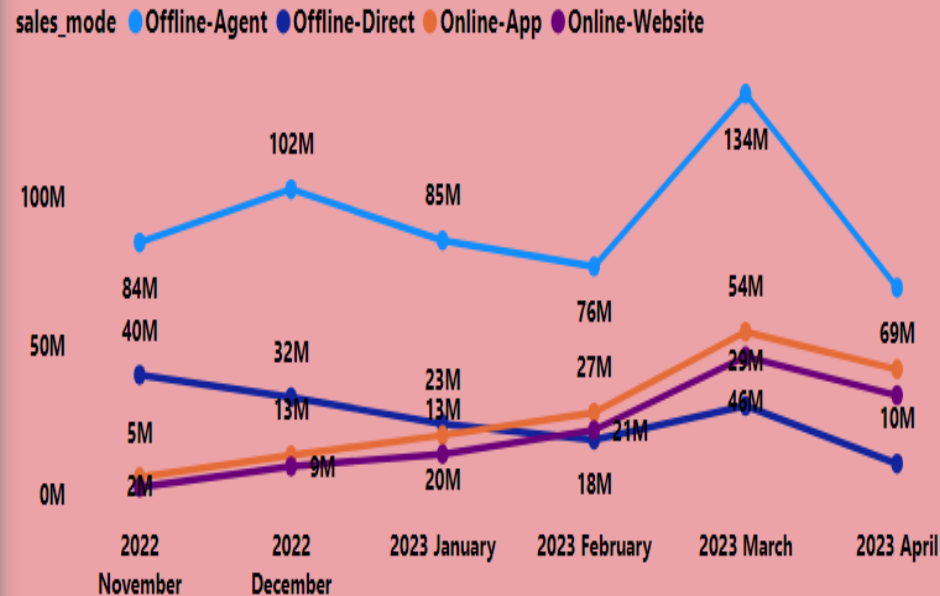
The Age Group with the highest revenue & Highest number of customers is 31-40 years



TOTAL REVENUE BY SALES MODE



MONTHLY REVENUE GROWTH BY SALES MODE

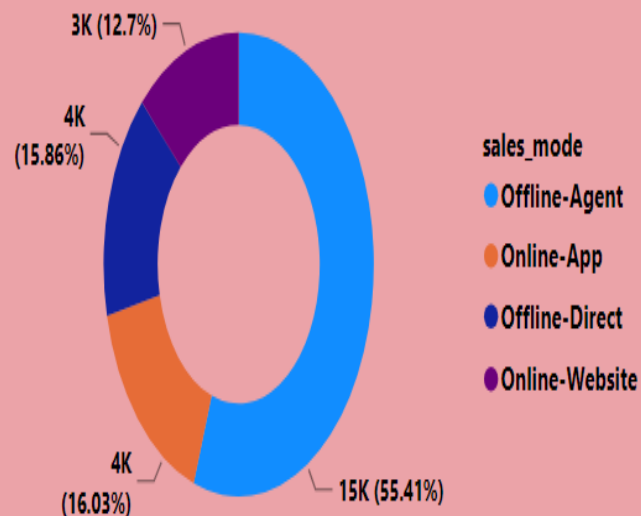


## SALES VIEW Insights

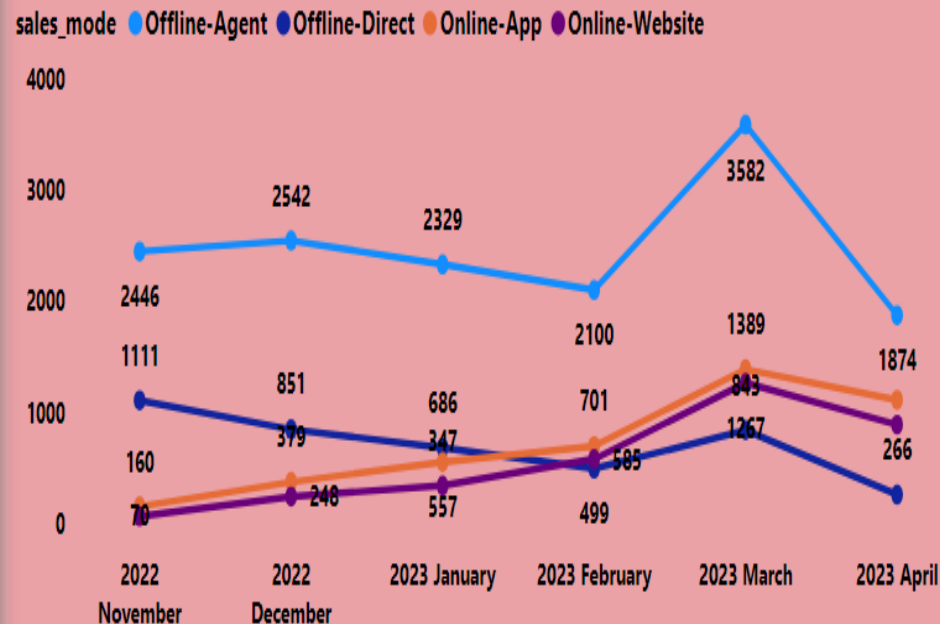
The Most Successful Sales Mode for Revenue and Customer Acquisition is the Offline-Agent Mode

The Offline Agent Channel Acquires the Majority of Clients Accounting for 55.41 % Customers & 55.67% of Revenue

TOTAL CUSTOMER BY SALES MODE



MONTHLY CUSTOMER GROWTH BY SALES MODE



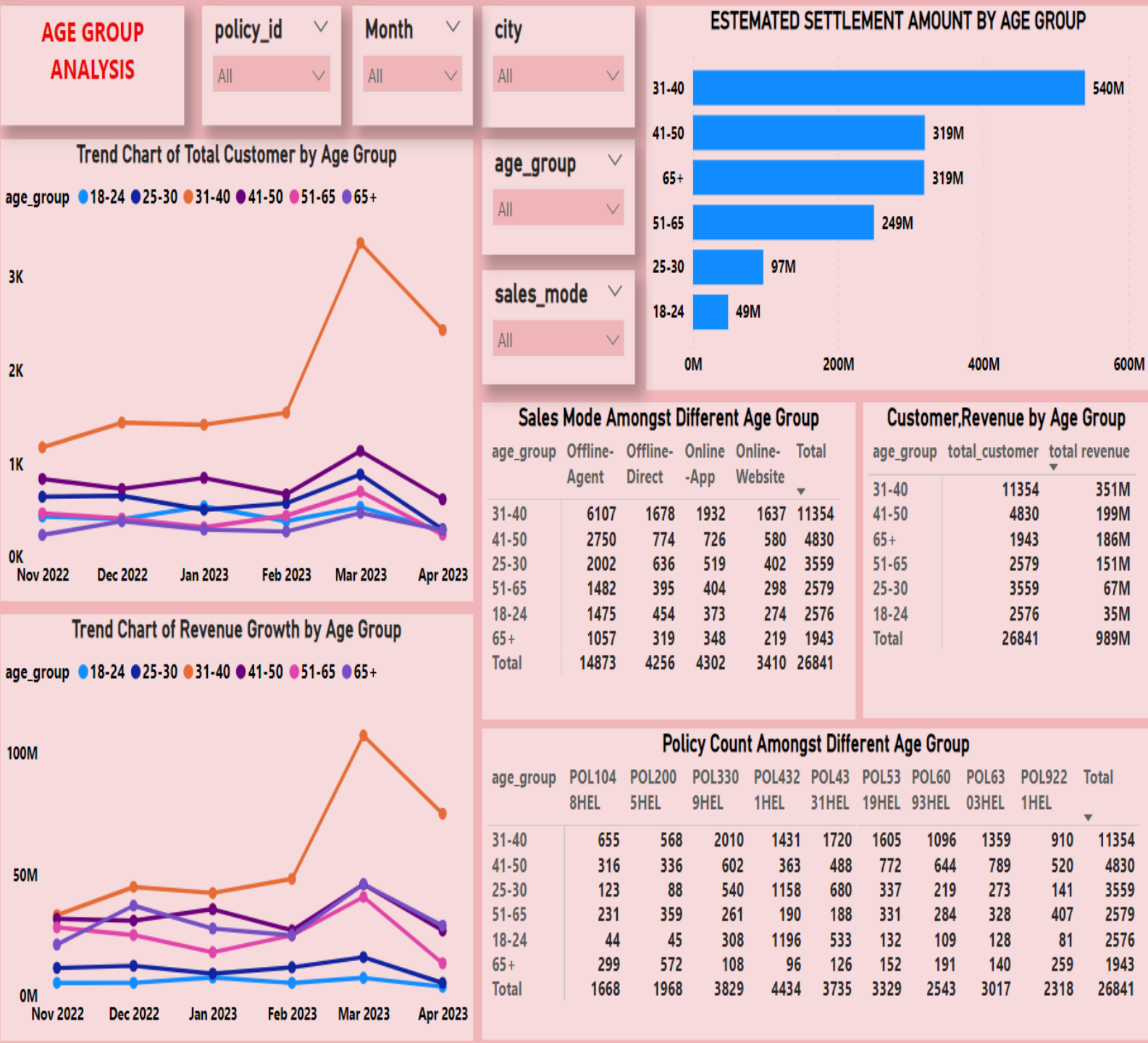
Online App and Online Website showed revenue growth from Feb 2023, while Offline-Direct declined

Offline-Agent mode showed a sudden Decline in the month of March ,



Offline Direct mode is the worst performing mode, certain changes need to be Done to boost performance





## AGE GROUP VIEW INSIGHTS

The 31-40 age Group Appeared as the most prominent Customer Base Across all Policies while 65+ has the lowest one



The 31-40 age Group has the Highest Contributed in term of Revenue collection while 18-24 age group has lowest one

The 31-40 age Group has the Highest 540M Estimated settlement Amount while 18-24 Age Group has the Lowest 49M.

Policy 'POL4321HEL' with a base premium of ₹5,000/- gathered a customer base exceeding 4000 as highest amongst all the policies



## RECOMMENDATIONS :

Based on the analysis, Here are some recommendations for Shield Insurance company :

### 1.Offline Agent Channel Optimization:

- Given that the offline agent channel consistently leads in sales, continue to invest in training and empowering agents to maintain their effectiveness.
- Explore opportunities to expand the offline agent network in high-potential regions to capture a larger market share.

### 2.Digital Channel Enhancement:

- Capitalize on the growing popularity of the online app and website channels by investing in user experience improvements, technological advancements, and marketing efforts to attract and retain digital-savvy customers.
- Consider introducing innovative features on the online app to enhance customer engagement and satisfaction.

### 3.Offline Direct Mode Analysis:

- Conduct a thorough analysis of the factors contributing to the decreasing trend in the offline direct sales mode.
- Identify areas for improvement, whether in marketing strategies, product offerings, or customer engagement, and implement corrective measures.

### 4.Monthly Performance Reviews:

- Establish a routine for monthly performance reviews to assess sales trends, customer feedback, and the effectiveness of marketing strategies for each sales mode.
- Use these reviews to make data-driven decisions and adapt strategies based on changing market dynamics.

### 5.Customer Segmentation:

- Further analyze customer demographics and preferences for each sales mode to tailor marketing and communication strategies.
- Develop targeted campaigns that resonate with the specific needs and preferences of each customer segment.

### 6.Employee Training and Motivation:

- Invest in ongoing training programs for employees across all channels to keep them updated on industry trends and enhance their skills.
- Implement motivational programs to boost morale and foster a positive work environment.





## Acknowledgments

“ Before I conclude, I would like to express my gratitude to  
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for their guidance  
and support throughout this internship “

**THANK YOU FOR  
WATCHING**

