Shield Insurance

PRESENTED BY: ANEESH MOHANAN

ABOUT COMPANY

- SHIELD Insurance Company, a trusted leader in comprehensive insurance solutions, is committed to safeguarding individuals against life's uncertainties with dependable coverage.

Sales Modes

The Company FOUR Sales Channels:

- Offline Agents
- Offline Direct
- Online App
- Online Websites

Problem Statement

▶ SHIELD Insurance aims to improve decision-making by leveraging a dashboard that delivers actionable insights into critical performance metrics.

▶ SHIELD Insurance is exploring a partnership with AtliQ Technologies to evaluate the effectiveness of this initiative.

▶ SHIELD Insurance requires a Power BI Pilot Project before proceeding with a full-scale implementation. This Pilot will act as a Proof of Concept, demonstrating AtliQ Technologies' capability to address their specific needs.

Power BI Dashboard

▶ SHIELD Insurance Power BI Dashboard offers in-depth analysis of key metrics, providing insights into overall performance, sales modes, and age group segments to support data-driven decisions

Overview	Sales	Age Group

Gain valuable insights by focusing on key insurance metrics, such as monthly revenue and customer trends, and analyzing customer segmentation to drive growth and improve decision making.

Revenue & Customer metrics based on different sales modes.

Revenue & Customer metrics based on different age groups

KEY INSIGHTS

- Overall Performance: March 2023: Significant revenue generation and customer acquisition achieved.

- Regional Performance: Delhi NCR: Notable achievements in both revenue generation and customer acquisition.

- Demographics Insights: Individuals in the age group of 31 to 40 are achieving the highest levels of revenue generation and customer acquisition.
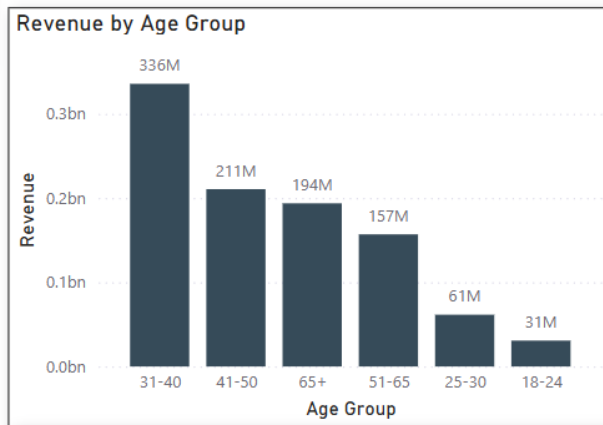
# Overview

989M
Revenue

This is total Revenue Generated

27K
Customer

This is Total Customer count

Revenue	Customer	Daily Customer...	Daily Revenue...
989M	27K	4K	154M
LM_Revenue_Perc...	LM_Customers_Pe...	LM_DailyCustome...	LM_DailyRevenue_...
18.40%	18.28%	-81.72%	-81.60%

Revenue by Age Group

Customer by Age Group

Revenue by mmm_yy

As per this analysis its showing revenue by age group is 336M with age group 31-40
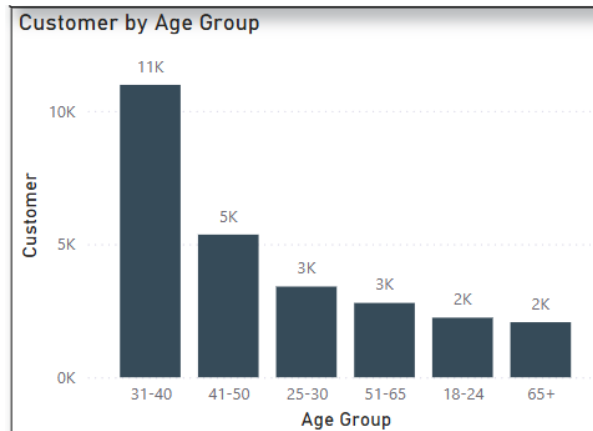
Highest customers are in the age group with 31-40

Highest revenue generated in march -2023

Sales

Customer by Sales Mode

0.84K (11.91%)

1.27K (17.89%)

3.58K (50.59%)

1.39K (19.62%)

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

Revenue by sales_mode

134M

54M

46M

29M

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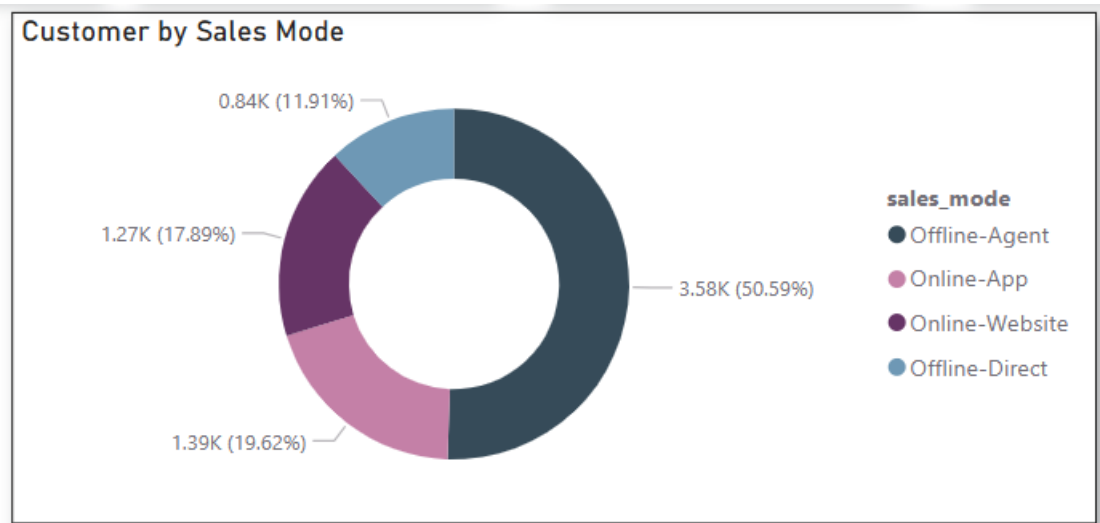
sales_mode

In the sales group notices highest sales mode is Offline – Agent with 3.58K

Revenue by sales with 134M with Offline Agent

As per the city Delhi NCR is getting more customer

Age Group

policy_id	18-24	25-30	31-40	41-50	51-65	65+
POL1048HEL	40	111	629	340	244	304
POL2005HEL	39	83	545	351	358	592
POL3309HEL	276	490	1945	707	287	124
POL4321HEL	1044	1175	1449	453	209	104
POL4331HEL	455	661	1686	592	207	134
POL5319HEL	109	318	1511	862	361	168
POL6093HEL	95	197	1051	670	326	204
POL6303HEL	110	249	1297	824	381	156
POL9221HEL	71	123	864	558	419	283

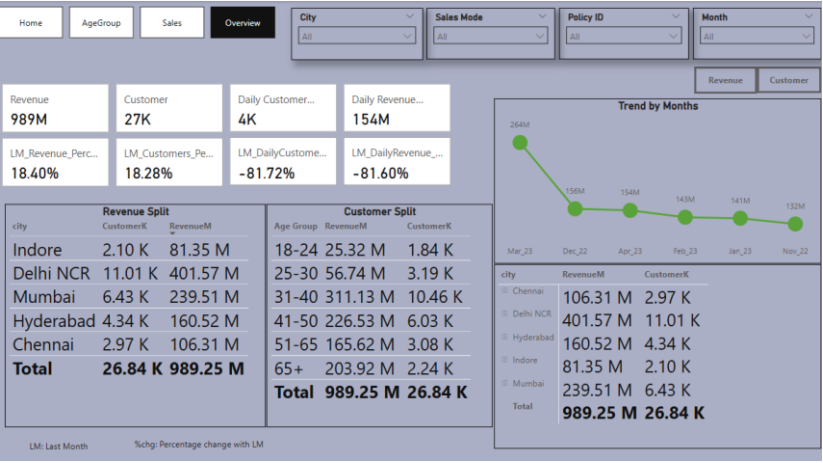The Analysis with Policy ID more policy holders are age group 31-40
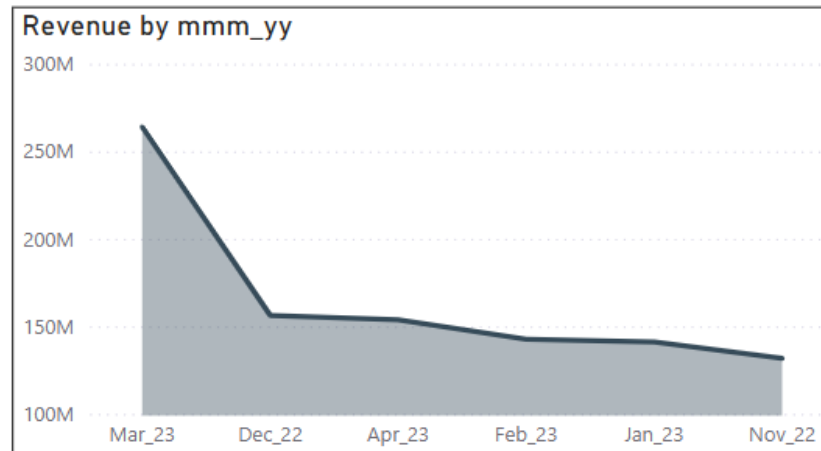
Highest revenue generated in the month of March-2023
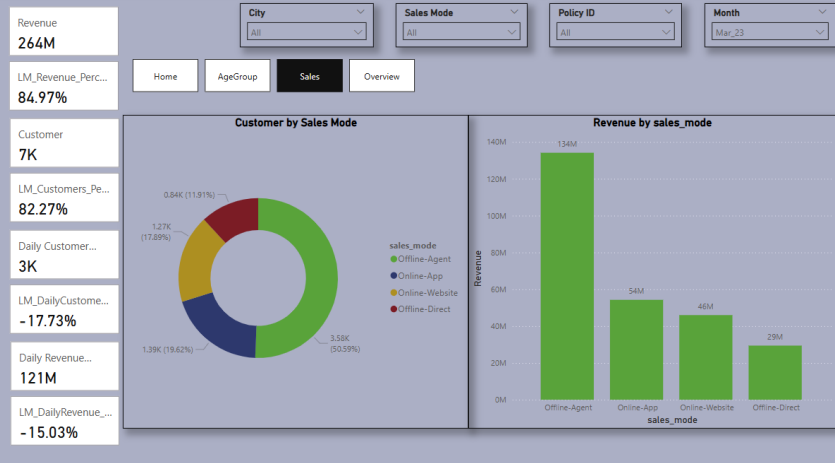
Dashboard Overview

Home

Overview

Sale

Age Group

►Thank You