



**Shield Insurance**

# Shield Insurance

This project is part of my Virtual Internship under the CodeBasics Data Analytics Bootcamp, at Atliq Technologies.

It serves as the final project submission, aimed at analyzing key insurance metrics to deliver actionable business insights through a Power BI dashboard.

→ **Presented By Ashvini Patil**



# Introduction



## About Shield Insurance

- Shield Insurance is a leading insurance provider serving customers across multiple Indian cities.
- We offer a wide range of policy options tailored to different age groups and customer needs.
- As part of a **pilot collaboration**, this project aims to unlock insights using data analytics to support **strategic decision-making**.

## Project Background

- Initiated as a pilot project to evaluate the potential of data-driven strategies at Atliq Technologies.
- Focus areas include revenue, customer trends, and policy performance across demographic segments.

# Objective



## Primary Objectives

- Understand total customers and total revenue generated.
- Track daily revenue growth rate (DRGR) and daily customer growth rate (DCGR) to monitor momentum.

## Analytical Goals

- Identify monthly policy changes to reveal trends and areas for improvement.
- Segment and analyze customers by age group, city, sales mode, and policy ID.
- Explore revenue and customer trends over time using switchable visualizations.
- Assess sales mode performance and age-group dynamics on revenue and claims settlement.

## Outcome

- Deliver a comprehensive Power BI dashboard that empowers the Shield Insurance team with insights to drive targeted business strategies.



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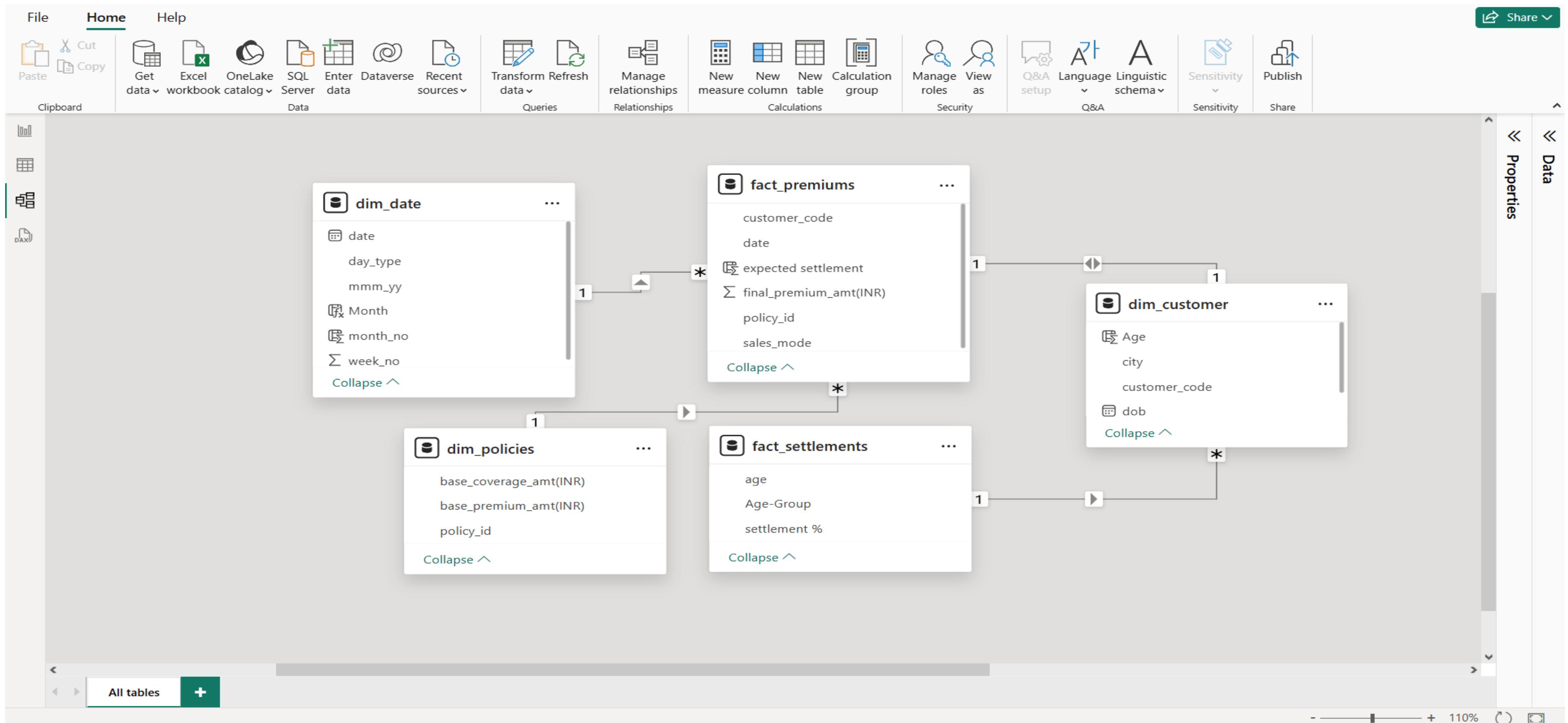




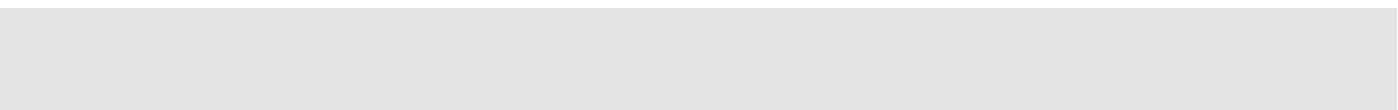
# Dataset Description

Table Name	Description
dim_customer	Contains customer demographics including unique ID, date of birth, and city.
dim_date	Provides date-level details including daily dates, months, weekdays, and weeks.
dim_policies	Contains information about insurance policies including cover amount and premiums.
fact_premiums	Captures policy sale transactions including customer, policy, sales mode, and premium paid.
fact_settlements	Contains age-wise policy settlement percentage details.

# Data Model



# Dashboard Overview



- **Home Page**  
Landing page with project title and navigation buttons that guide users to different analysis pages with brief descriptions.
- **General View**  
Explore overall trends with city-wise revenue, monthly growth, and customer segmentation by city and age group.
- **Sales Mode Analysis**  
Analyze customer and revenue distribution by sales channels with trends across months and age groups.
- **Age-Group Analysis**  
Understand policy preference, revenue contribution, and average settlement patterns across different age groups.



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# KPIs



Total Revenue	Total Customers	Daily Revenue Growth Rate	Daily Customer Growth Rate
<b>989.25 Million</b>	<b>26.84 Thousand</b>	<b>5.47 Million</b>	<b>148.29</b>
Indicates the overall premium revenue generated across all cities, policies, and age groups.	Total number of unique customers who purchased policies.	Reflects the average daily increase in revenue during the selected period.	Measures how many new customers are added on average each day.



# SHIELD INSURANCE



Created By Ashvini Patil



View overall performance with city-wise revenue, monthly trends, and customer segmentation.



Analyze revenue & customer split % and monthly trends by sales modes & Sales Mode across age groups.



Explore revenue, policy preference, and Avg settlement across different customer Age-Groups.



## Filters

Customer	Revenue
----------	---------

Age-Group	All
-----------	-----

Month	All
-------	-----

city	All
------	-----

policy_id	All
-----------	-----

sales_mode	All
------------	-----

### Abbreviation

LM = Last Month  
DCGR = Daily Customer Growth Rate  
DRGR = Daily Revenue Growth Rate

Revenue values are in ₹



Home



General View



Sales Mode Analysis



Age-Group Analysis



989.25M  
Total Revenue  
Not Available



26.84K  
Total Customer  
Not Available



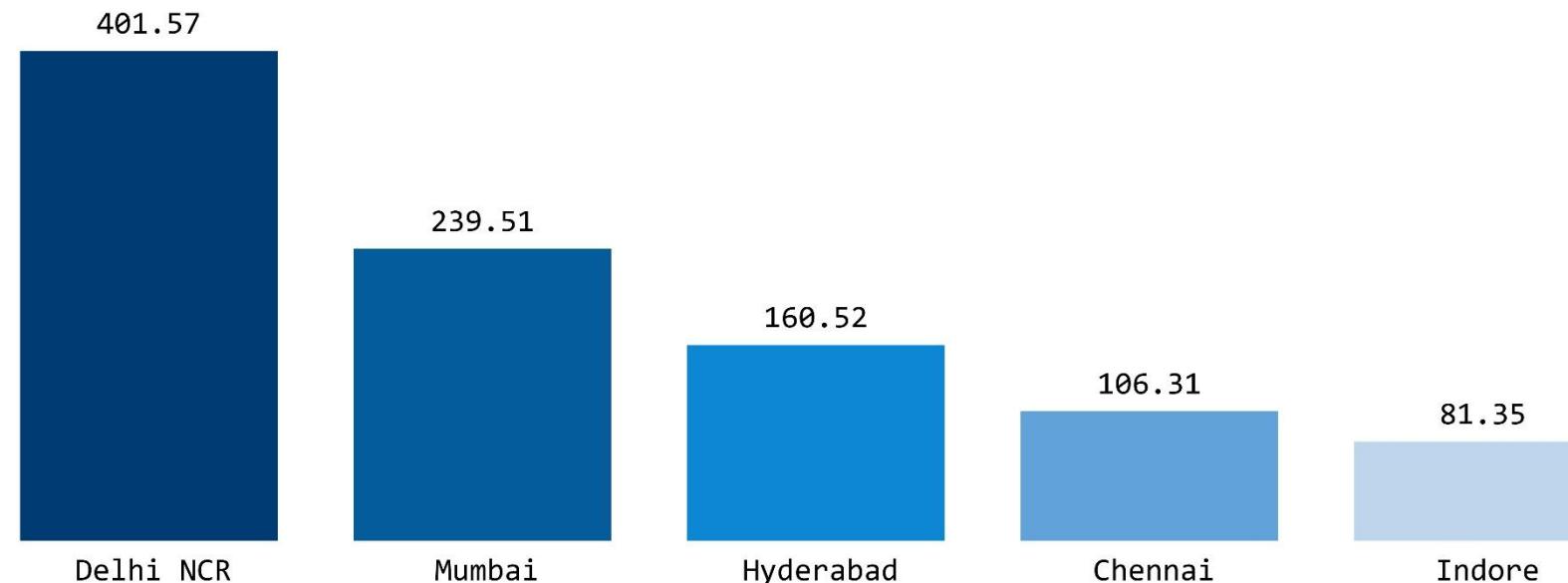
5.47M  
DRGR  
Not Available



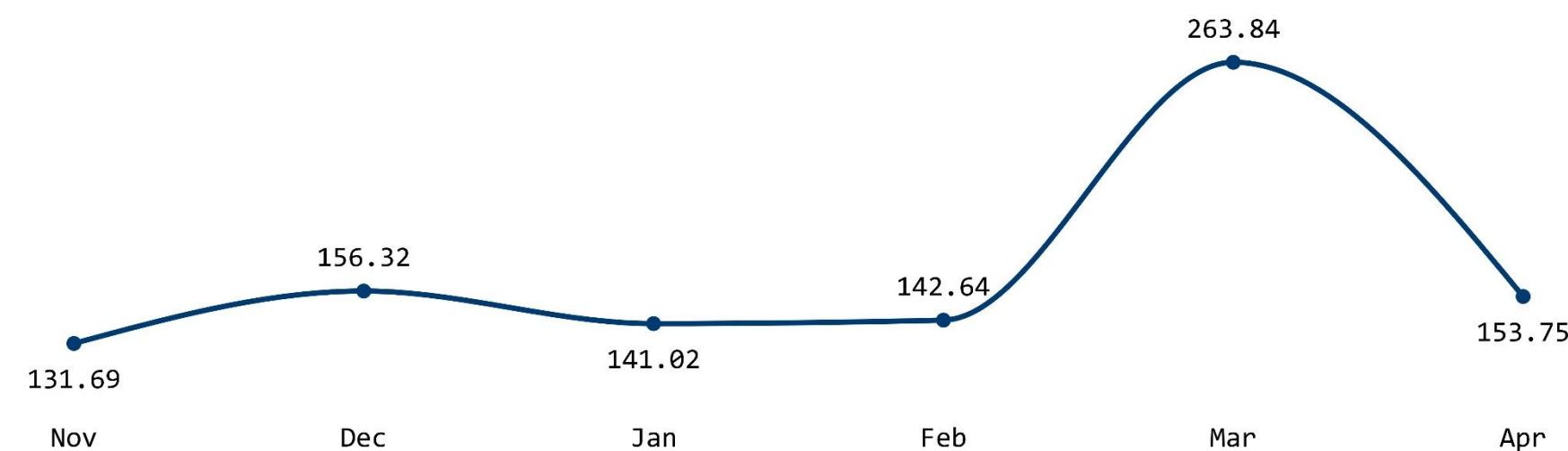
148.29  
DCGR  
Not Available

### Revenue Split by City (Millions)

city	Age-Group
------	-----------



### Revenue Trend Over Month (Millions)



### Revenue Segmentation by City & Age-Group (Millions)

city	Age-Group	Revenue
Delhi NCR	31-40	128.23
Delhi NCR	41-50	90.00
Delhi NCR	65+	82.58
Mumbai	31-40	73.11
Delhi NCR	51-65	67.14
Mumbai	41-50	54.74
Hyderabad	31-40	50.79
Mumbai	65+	48.24
Mumbai	51-65	42.49
Hyderabad	41-50	39.14
Hyderabad	65+	33.55
Chennai	31-40	32.43
Indore	31-40	26.56
Hyderabad	51-65	25.51
Chennai	41-50	25.42
<b>Total</b>		<b>989.25</b>



## Filters

Customer	Revenue
----------	---------

Age-Group  
All

Month  
All

city  
All

policy\_id  
All

sales\_mode  
All

### Abbreviation

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Home



General View



Sales Mode Analysis



Age-Group Analysis



989.25M  
Total Revenue  
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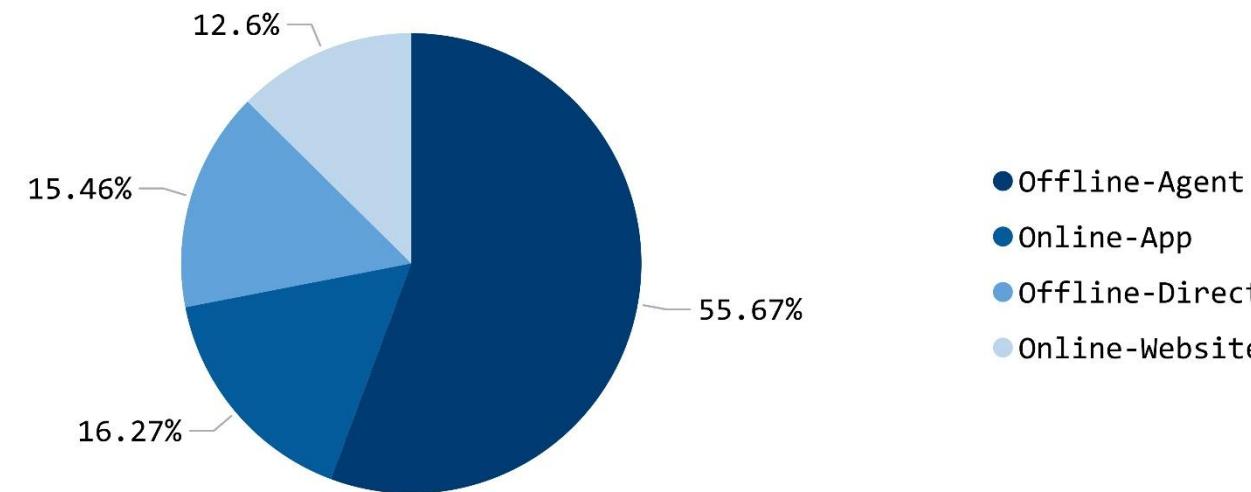


5.47M  
DRGR  
Not Available

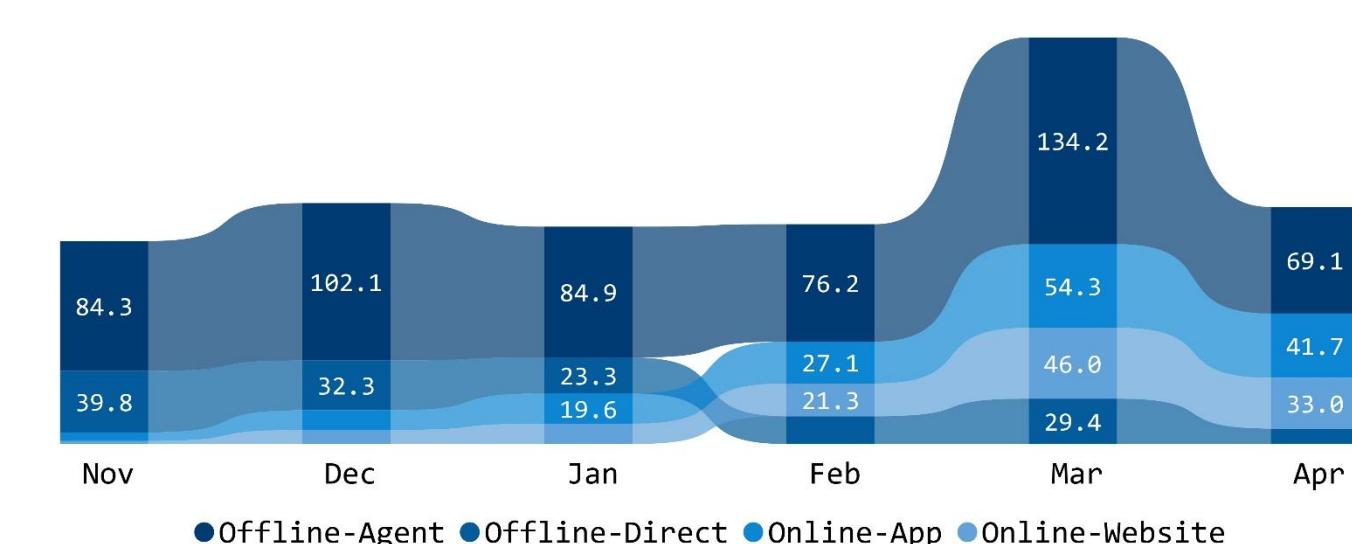


148.29  
DCGR  
Not Available

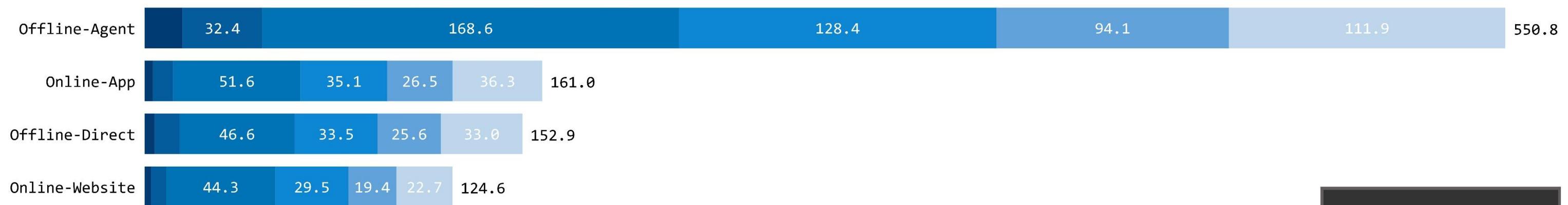
### Revenue Split % by Sales Mode



### Revenue Trend by Sales Mode Over Month (Millions)



### Revenue by Sales Mode & Age-Group (Millions)



● 18-24 ● 25-30 ● 31-40 ● 41-50 ● 51-65 ● 65+

Age-Group By Sales Mode



## Filters

<input checked="" type="radio"/> Customer	<input type="radio"/> Revenue
---	-------------------------------

Age-Group

All

Month

All

city

All

policy\_id

All

sales\_mode

All

### Abbreviation

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Revenue values are in ₹



Home



General View



Sales Mode Analysis



Age-Group Analysis



989.25M

Total Revenue

Not Available



26.84K

Total Customer

Not Available



5.47M

DRGR

Not Available



148.29

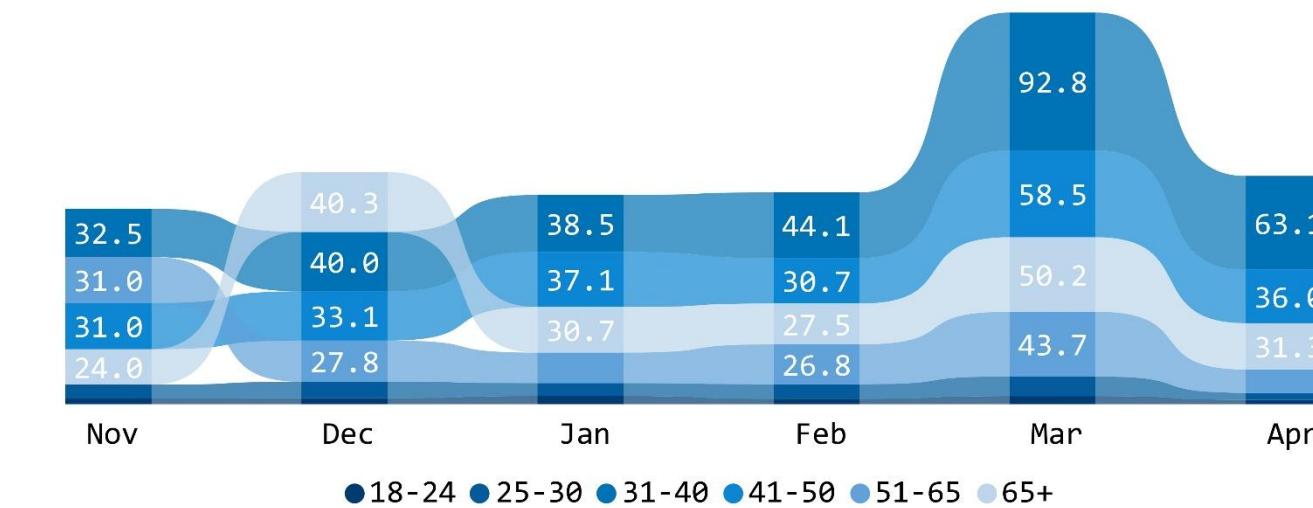
DCGR

Not Available

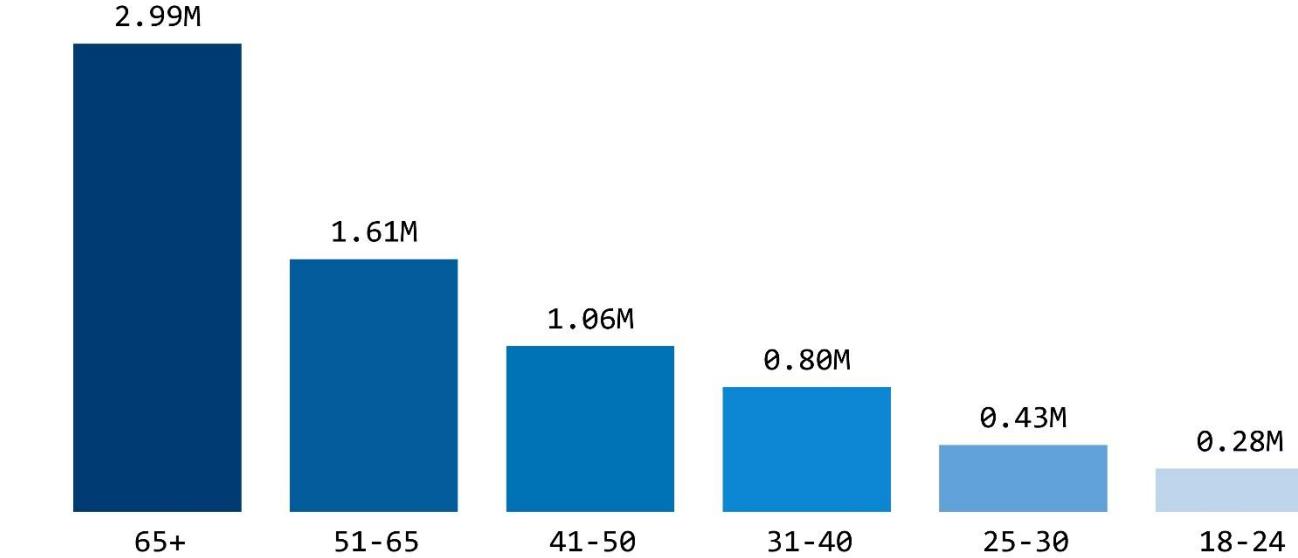
### Age-Group VS Policy Preference (Millions)

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL1048HEL	2.36	8.37	54.27	36.30	28.04	38.50	167.86
POL2005HEL	3.96	10.36	71.82	58.35	62.28	117.49	324.26
POL3309HEL	2.85	5.66	26.26	13.12	5.34	2.69	55.92
POL4321HEL	4.35	6.11	8.92	3.54	1.66	0.88	25.47
POL4331HEL	2.92	5.03	14.65	6.62	2.54	1.74	33.50
POL5319HEL	1.59	4.80	28.15	20.41	9.95	4.69	69.60
POL6093HEL	2.42	6.26	36.55	29.63	16.44	11.24	102.55
POL6303HEL	2.08	5.15	30.89	24.96	12.68	5.99	81.76
POL9221HEL	2.78	4.99	39.61	33.60	26.67	20.68	128.33
<b>Total</b>	<b>25.32</b>	<b>56.74</b>	<b>311.13</b>	<b>226.53</b>	<b>165.62</b>	<b>203.92</b>	<b>989.25</b>

### Revenue Trend by Age-Group Over Month (Millions)



### Average Settlement Amount By Age-Group





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# Key Insights

- **Strong Contribution from 31–40 Age Group**  
This segment leads both in revenue (₹311.13M) and customer count (10.46K), making it the company's most valuable age group.
- **65+ Segment Shows High Revenue Per Customer**  
Although fewer in number (2.24K), the 65+ group contributes ₹203.92M, indicating higher average premium values and settlement expectations.
- **POL2005HEL Drives Revenue, POL4321HEL Leads in Volume**  
POL2005HEL generated the highest revenue (₹324.26M), while POL4321HEL had the most customers (4.43K), showing strong acceptance across segments.
- **Delhi NCR Drives Growth**  
Delhi NCR is the top-performing city in both revenue (₹401.57M) and customer count (11.01K), particularly within the 31–50 age group.
- **March Was the Peak Month**  
The highest surge in both revenue and customer acquisition was observed in March — likely due to seasonal policy activity.
- **Offline-Agent Dominates Sales**  
Over 55% of both revenue and customers came via Offline-Agent mode, highlighting the need to continue strengthening this channel.
- **Younger Segments Show Lower Engagement**  
The 18–24 group lags in both revenue and customer count, while the 25–30 group ranks third in customer count but lower in revenue.



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# Recommendations

- 1. Promote High-Impact Policies**
  - Expand visibility of POL2005HEL (high revenue) and POL4321HEL (high customer count).
  - Phase out or revamp low-performing policies like POL1048HEL and POL4321HEL based on low uptake and returns.
- 2. Optimize Sales Mode Strategy**
  - Offline-Agent should remain the core focus, but:
    - Revitalize Online-Website and Offline-Direct, which show lower customer engagement.
    - Consider improving UX or promotional offers to boost digital channel performance.
- 3. Focus on High-Growth Cities**
  - Continue targeted expansion in Delhi NCR and Mumbai.
  - Evaluate performance in cities like Indore and Chennai, which show lower revenue and customer metrics, to decide on resource reallocation.
- 4. Replicate March Success Across Months**
  - Analyze what triggered peak growth in March and apply the learnings to off-peak months.
- 5. Re-engage Younger Segments**
  - Design lightweight or lifestyle-based products to better convert the 18–24 group, and increase value for the 25–30 segment.
- 6. Align Products with Age-Group ROI**
  - Track revenue per customer by age to better align policy pricing and settlement expectations.

# Resources & Credits

## 🔗 Icons Used (Freepik):

Home Icon – [Rizki Ahmad Fauzi](#)  
General View Icon – [Dwi Ridwanto](#)  
Sales Mode Analysis Icon – [nangicon](#)  
Age Group Analysis Icon – [ARIF MIFTAHL ANWAR](#)  
Total Revenue Icon – [Yogi Aprelliyanto](#)  
Total Customers Icon – [Andrean Prabowo](#)  
Daily Revenue Growth Icon – [Afian Rochmah Afif](#)  
Daily Customer Growth Icon – [Basicon](#)  
Growth Arrow (Up - Green) – [riajulislam](#)  
Decline Arrow (Down - Red) – [Creative Squad](#)  
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## 📷 Image Used:

Home Page Image – [Drazen Zigic on Freepik](#)



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# Thank You

Thank you for taking the time to explore my Shield Insurance project. This experience has strengthened my analytical thinking and dashboard storytelling skills. Special thanks to CodeBasics, AtliQ Technologies, and my mentors for the guidance and opportunity through this virtual internship. I look forward to your feedback and the opportunity to apply these skills in real-world projects!



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<https://github.com/ashvini7823>

<https://codebasics.io/portfolio/Ashvini-Patil>