



Shield Insurance

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Introduction

Shield Insurance is a rapidly expanding insurer catering to diverse customer needs across multiple Indian cities. Offering a wide range of policies — from health and life insurance to auto and travel coverage — the company focuses on delivering reliable protection, personalized service, and swift claim processes. With a customer base spanning all age groups, Shield Insurance aims to set new benchmarks in accessibility, affordability, and trust in the insurance sector.



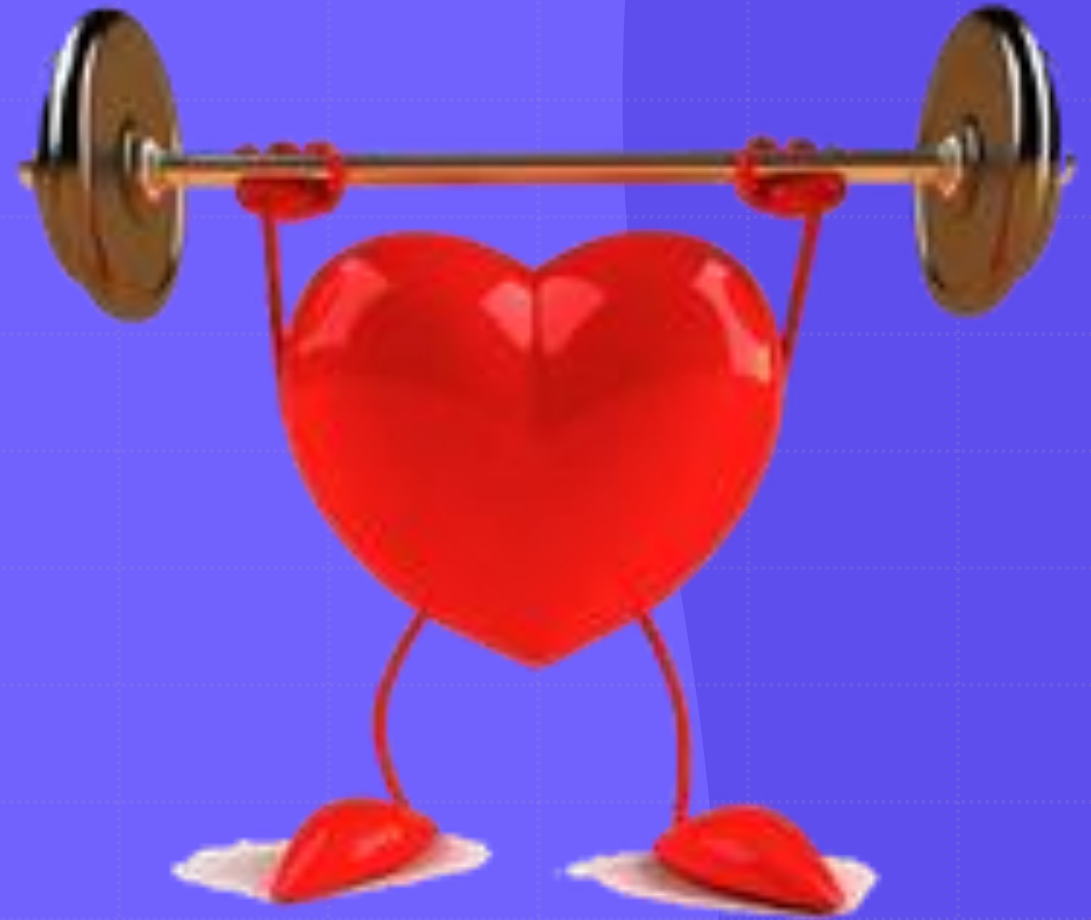
Problem Statement

Despite strong market presence and growth, Shield Insurance faces challenges in optimizing performance across cities, sales channels, and age segments. Disparities in revenue contribution, underperformance of certain channels, and varying customer engagement across age groups limit the company's ability to fully capitalize on its market potential. To address these gaps, Shield Insurance seeks a data-driven approach to identify key opportunities, enhance decision-making, and sustain long-term growth.

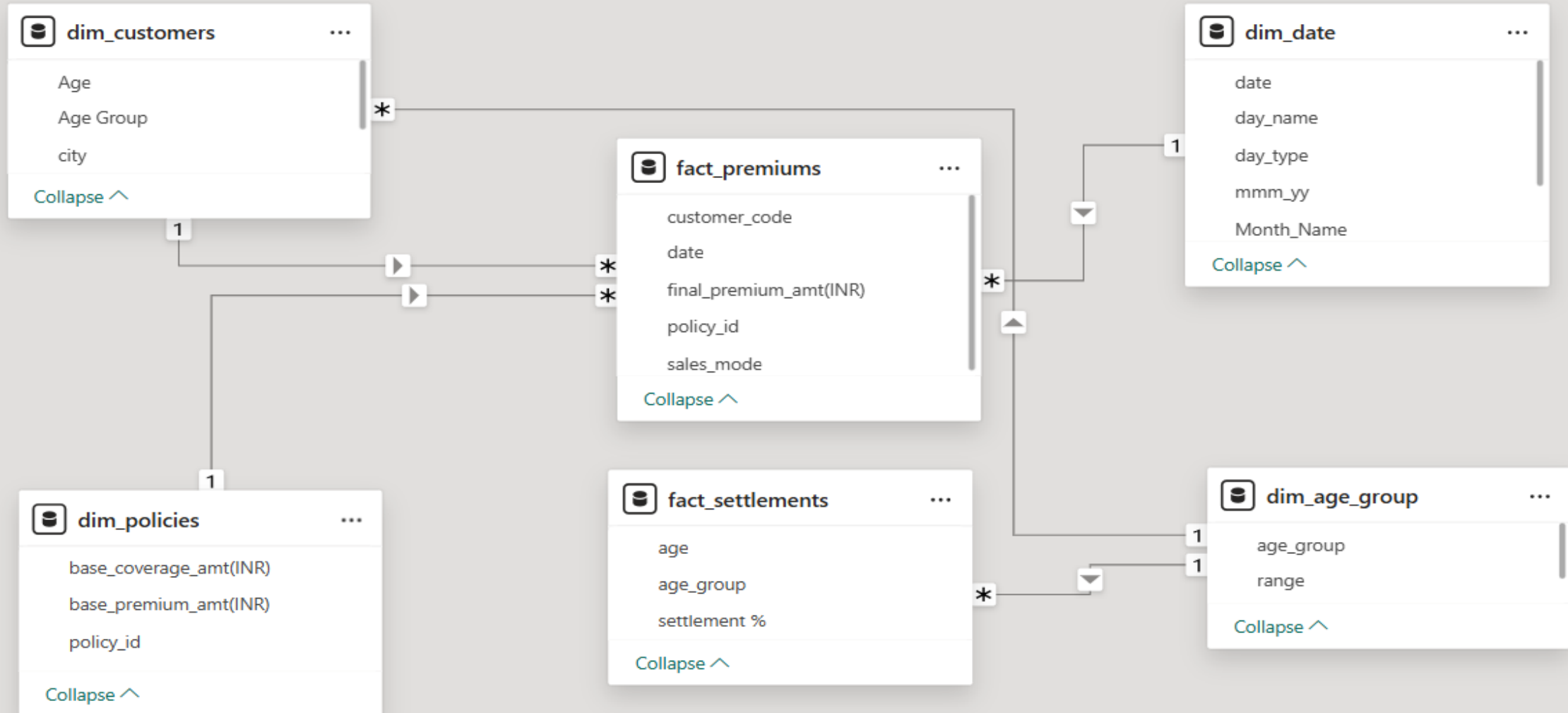


Objective

The goal of this project is to design a comprehensive, insight-driven dashboard that translates raw business data into actionable intelligence. By visualizing trends in revenue, customer distribution, sales modes, and demographic performance, the dashboard will empower Shield Insurance to make faster, more informed decisions, optimize resource allocation, and strengthen competitive positioning in the insurance market.



Data Model View



Insights

What we see from the data:

Best Month: March 2023 had the highest sales (₹264M) and most customers (~7.1K).

Slowest Month: November 2022 saw the lowest sales (₹132M) and customers (~3.8K).

Top Location: Delhi NCR brings in around 40% of both sales and customers – a clear leader.

Weak Location: Indore contributes less than 10% – room to grow.

How people are buying:

Offline agents bring in more than half of all sales and customers – they are the main channel.

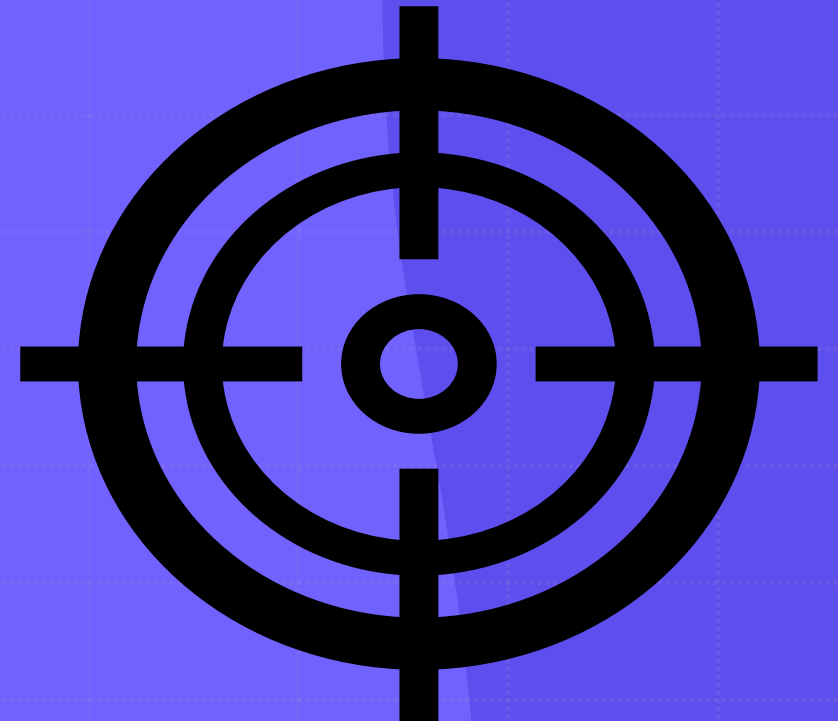
Online channels (app & website) are still behind and not bringing as much business.

Who is buying:

31–40 age group is the biggest customer segment – the main target.

65+ customers are fewer but buy higher-value policies.

18–24 age group has very few policies – not yet engaged.



Recommendations

To grow faster and serve better:

1. Focus on strong areas: Keep investing in Delhi NCR and Mumbai with targeted campaigns.
2. Improve weak areas: Run local promotions and agent recruitment drives in Indore.
3. Make online stronger: Improve the app and website experience so it's quick, easy, and trustworthy.
4. Keep agents motivated: Offer incentives to maintain steady sales across the year.

For different age groups:

31–40: Offer bundled plans and rewards for renewals.

65+: Provide simple claim processes and extra support.

18–24: Create low-cost starter plans and promote them on social media.

Better claim experience:

Give customers a clear checklist and help during claims to speed up approval and improve satisfaction.



Thank you

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