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Business Requirement Document

Dashboard Title: Stakeholder Insights & Performance Dashboard

Purpose

This Tableau dashboard was developed to provide a comprehensive overview of stakeholder performance, premium flows, and asset management in the banking sector.

It offers real-time insights into key metrics including total premiums, equity value created, profitability by city and tenure, and distribution of assets under management.

The dashboard supports dynamic filtering by city, stakeholder type, tenure, gender, and more to enable focused performance evaluation.

Business Value & Insights

- Track premium inflows of over 245.9B and 230.8B in equity value created across stakeholder channels.
- Identify profitability patterns by customer tenure and city to guide retention and acquisition strategies.
- Understand asset distribution by stakeholder to allocate resources effectively.
- Monitor net profitability through cost ratios and net worth indicators.
- Evaluate governance and investment structures via shareholding patterns (FII, DII, Promoters, Retail).
- Empower executives and analysts with centralized access to strategic financial and operational metrics.

Key Performance Indicators (KPIs)

- Total Premium Collected: 245.9B
- Average Age of Stakeholders: 34.45
- Equity Value Created: 230.8B
- Highest Value Created by Single Insurer: 49.17M

Charts and Visualizations

- Bar Chart: Value created by different insurers (e.g., Bancassurance, Broker).
- Stacked Bar Chart: Trends in premium over years.
- Bar + Heat Chart: Profitability segmented by city and tenure.
- Column Chart: Assets under management by stakeholder type.

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- Donut Chart: Shareholding distribution.
- Bar Chart: Cost Ratio vs Profitability breakdowns (commission, opex, total cost).

Filters and Interactivity

- Filters for Assets Management Type, City, Date, Gender, Stakeholder, Premium, and Profitability.
- Chart interactivity: Clicking on charts filters other components dynamically.
- Tooltips on hover display detailed value-level insights.
- All visuals and KPIs refresh automatically upon filter selection.

Export Options

- Dedicated PDF export button integrated into dashboard.
- All visual components and KPIs included in exported format.
- Optionally watermarked with company branding (e.g., YES BANK).

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