



Shield Insurance

“ Protecting Your Tomorrow, Today ”

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INSURANCE
POLICY
TERMS AND CONDITIONS





About the Shield Company

- ▶ Shield Insurance Company is a leading provider of comprehensive insurance solutions.
- ▶ They are committed to deliver exceptional service and value to their clients.
- ▶ With a strong focus on innovation, they aim to redefine the insurance landscape by leveraging cutting-edge technologies and data-driven insights.



Goal

The Aim is to assist Shield Insurance in using a user friendly dashboard packed with useful business insights to guide their decision-making with data.

Cities

Delhi-NCR

Indore

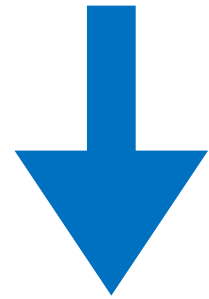
Mumbai

Hyderabad

Chennai

Sales Mode

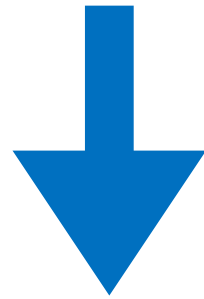
Online



Online
Website

Online
App

Offline



Offline
Agent

Offline
Direct



Data Sets

The below CSV files having data of company's customers and services for last 6 months i.e. from Nov 2022 – Apr 2023, have been used as data sources for this presentation:

- dim_customer.csv - This table contains all the information about the customers.
- dim_date.csv - This table contains the dates at daily, monthly levels and week numbers of the year.
- dim_policies.csv - This table contains all policies data.
- fact_premiums.csv - This table contains all information about policy orders.
- fact_settlements.csv - This table contains information about policy settlement.

Description of The Report Layout



Home

This page serve as a landing page for this Power BI report from where you can navigate through other desired pages.



General View

This report page provide information about KPIs, Monthly Trends of Revenue Growth & Customer Growth, and other key metrics.



Sales Mode View

This report page provide visual information about key metrics on the basis different sales modes.

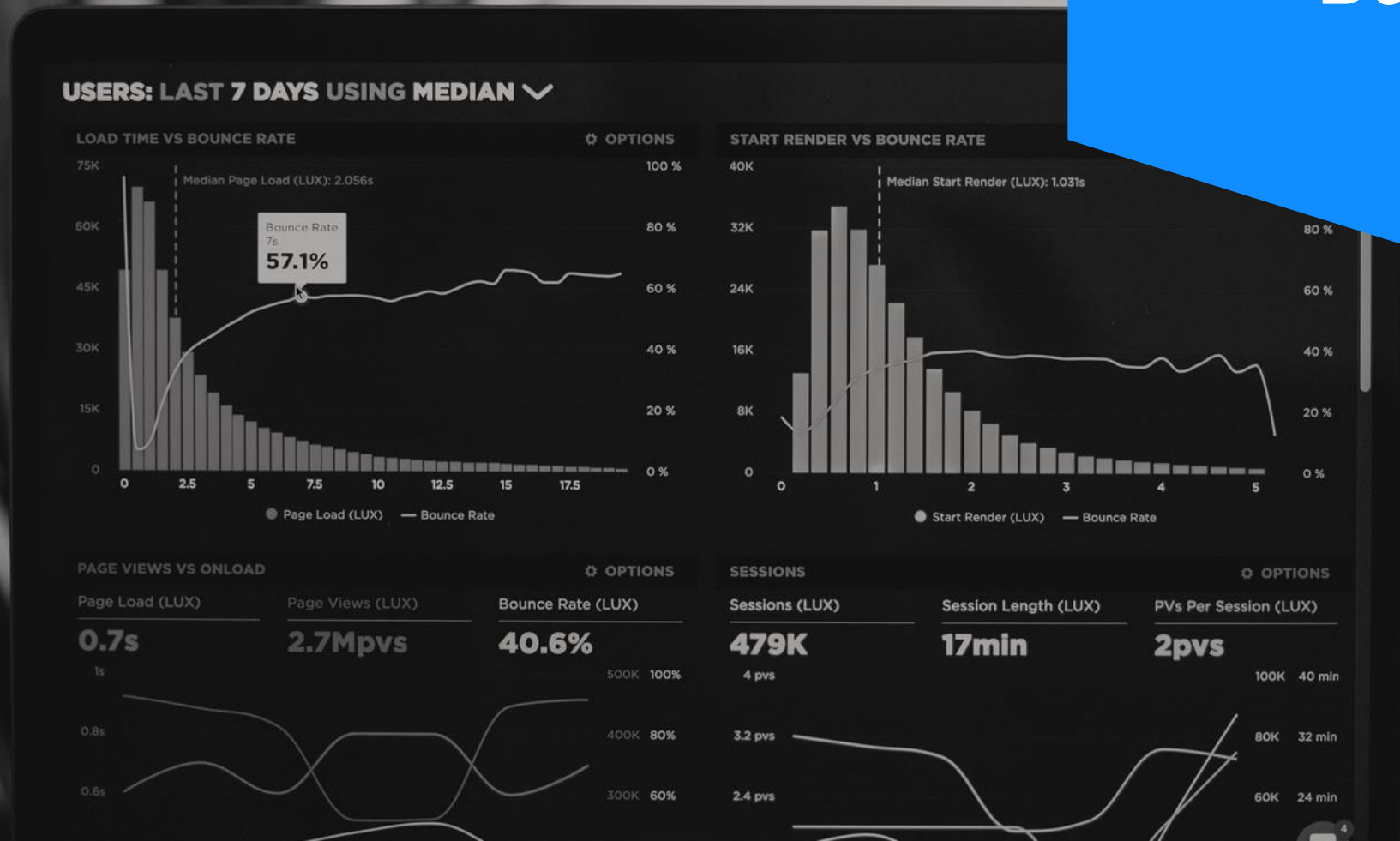


Age Group

This report page provide visual information about customer key metrics on the basis different Age Groups.



Let's Explore the Dashboard !!





Insights:

- March 2023 Performance Peak: Witnessed the highest revenue and customer acquisition.
- Delhi NCR Dominance: Led in revenue and customer acquisition among all cities.
- Key Age Group Contribution: The 31-40 age group significantly contributed to both revenue and customer base.
- Sales Mode Impact: Offline-Agent sales mode attracted the most customers and generated the highest revenue.
- Online Sales Dynamics: Online App and Website showed revenue growth from Feb 2023, while Offline-Direct declined.
- Popular Policy: Policy 'POL4321HEL' with a base premium of ₹5,000/- gathered a customer base exceeding 4000.
- Age Group Preference: The 31-40 age group appeared as the prominent customer base across all policies.

Recommendations:

- March Success Analysis: Investigate factors driving the exceptional performance in March for potential replicable strategies.
- City-Wise Strategies: Leverage successful tactics from Delhi NCR to balance revenue growth across all cities.
- Targeted Age Group Campaigns: Develop tailored marketing or policy offerings for the 31- 40 age group to further capitalize on their significance.
- Online Sales Enhancement: Revamp the Offline-Direct mode by leveraging insights from successful Online App and Website sales.
- Policy Expansion: Explore variations of the popular 'POL4321HEL' policy to attract a wider customer base across different demographics.



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