SHIELD INSURANCE

OBJECTIVES

- To analyze the customer distribution and revenue trends for Shield Insurance across different cities and sales modes.

- To provide actionable insights into customer behavior based on age groups, policy preferences, and expected settlement values.

- To help the company identify high-performing segments and improve decision-making in product offerings and sales strategies.

- This project is based on a virtual internship and focuses on using Power BI dashboards to support data-driven insights.

COMPANY OVERVIEW

Shield Insurance operates through 4 key sales modes:

1. **Offline-Agent**

2. **Offline-Direct**

3. **Online-App**

4. **Online-Website**

The company aims to provide comprehensive insurance services via both online and offline channels to cater to diverse customer preferences.

CITIES

Shield Insurance currently operates in 5 major Indian cities:

1. Chennai

2. Delhi NCR

3. Hyderabad

4. Indore

5. Mumbai

These cities represent the key markets where customer and revenue performance are analyzed in detail.
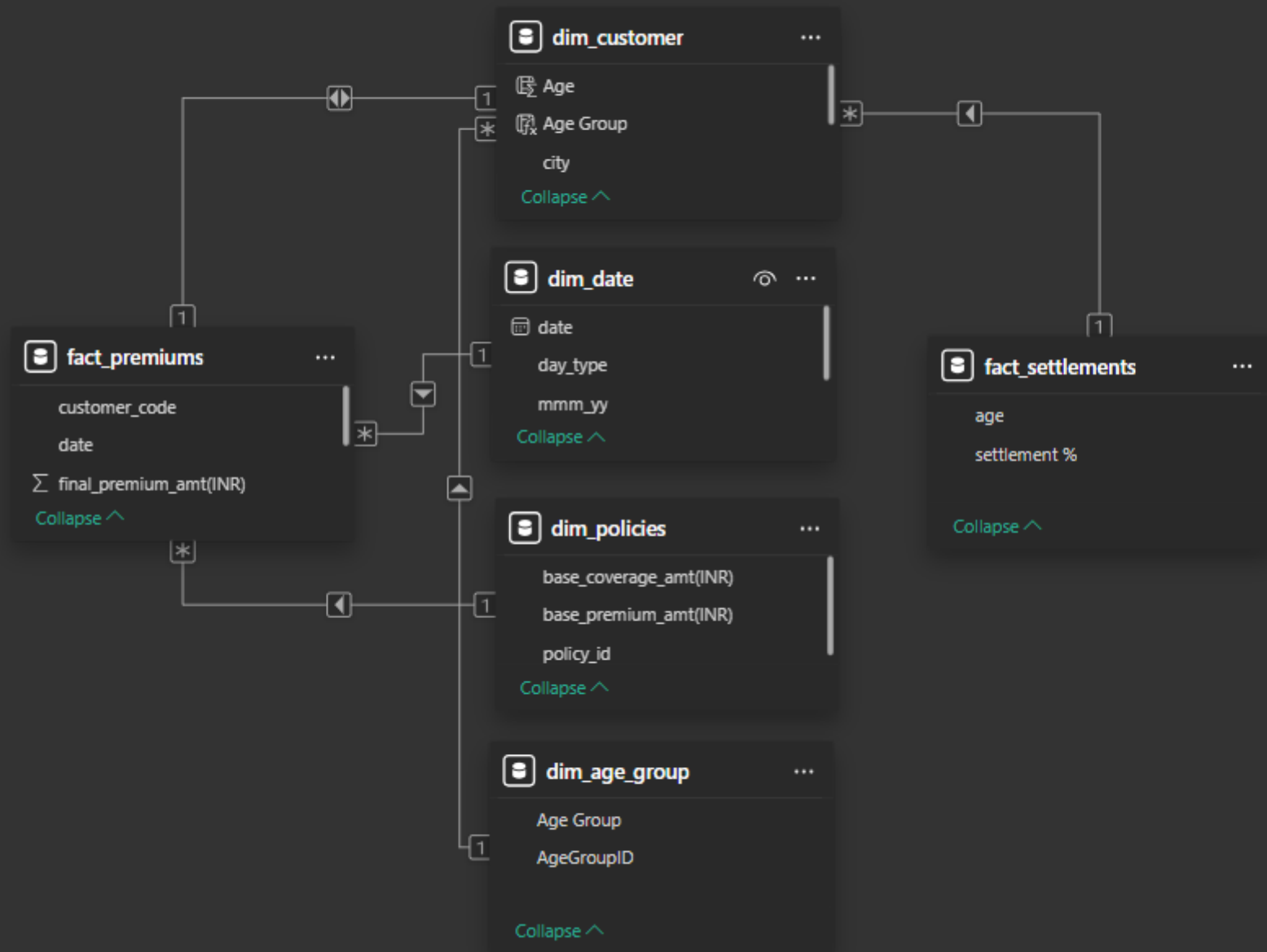
1 CHENNAI

2 DELHI NCR

3 HYDERABAD

4 INDORE

5 MUMBAI

SHIELD INSURANCE

General View

High-level insights on total revenue, customer base, and daily growth metrics. Analyze revenue trends by month and city, and segment performance by age groups.

Sales Mode Analysis

Sales channel performance breakdown across four modes: Offline Agent, Offline Direct, Online App, and Online Website. Visuals show customer and revenue splits, plus time-based trends.
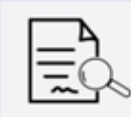
Age Group Analysis

Explore **customer behavior by age segment**, sales mode preference, policy inclination, and expected settlement values. Spot trends across months and understand which age groups drive business.

General View

city	month	policy_id	sales_mo...	Age Group
All	All	All	All	All

SHIELD INSURANCE

26.84K
Total Customers
Blank
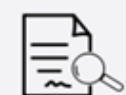
989.25M
Total Revenue
Blank

148.29
Daily Customers Growth
Blank

5.47M
Daily Revenue Growth
Blank

Customer & Revenue Split by Age Group

Age Group	Total_Customers	Total_Revenue
18-24	1844	25.32M
25-30	3194	56.74M
31-40	10460	311.13M
41-50	6031	226.53M
51-65	3077	165.62M
65+	2235	203.92M
Total	**26841**	**989.25M**

Month wise Trend by Revenue

| Revenue | Customer |

- Nov 2022: 132M
- Dec 2022: 156M
- Jan 2023: 141M
- Feb 2023: 143M
- Mar 2023: 264M
- Apr 2023: 154M

Customer & Revenue Split by City

City	Total_Customers	Total_Revenue
Chennai	2966	106.31M
Delhi NCR	11007	401.57M
Hyderabad	4340	160.52M
Indore	2096	81.35M
Mumbai	6432	239.51M
Total	**26841**	**989.25M**

Customers Segmentation

City	Total_Customers	Total_Revenue
⊞ Chennai	2966	106.31M
⊞ Delhi NCR	11007	401.57M
⊞ Hyderabad	4340	160.52M
⊞ Indore	2096	81.35M
⊞ Mumbai	6432	239.51M
Total	**26841**	**989.25M**

Sales Mode Analysis

city | month | policy_id | sales_mode | Age Group

All | All | All | All | All

SHIELD INSURANCE

Total Revenue split% by sales_mode

125M (12.6%)

153M (15.46%)

161M (16.27%)

551M (55.67%)

sales_mode
- Offline-Agent
- Online-App
- Offline-Direct
- Online-Website
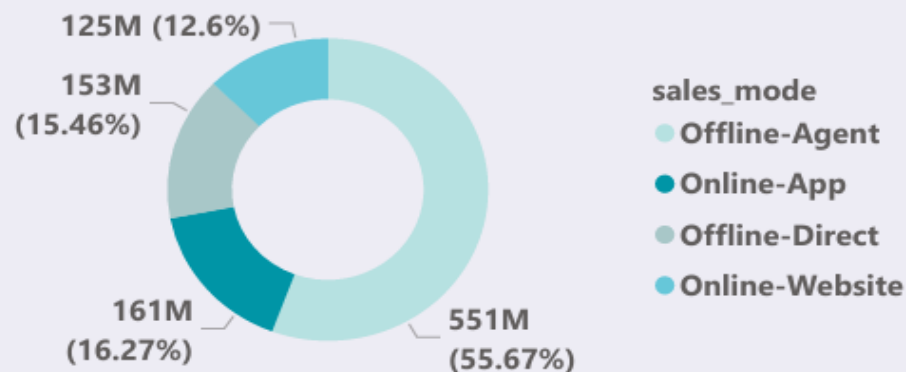
Total Customers split% by sales_mode

3.41K (12.7%)

4.26K (15.86%)

4.3K (16.03%)

14.87K (55.41%)

sales_mode
- Offline-Agent
- Online-App
- Offline-Direct
- Online-Website
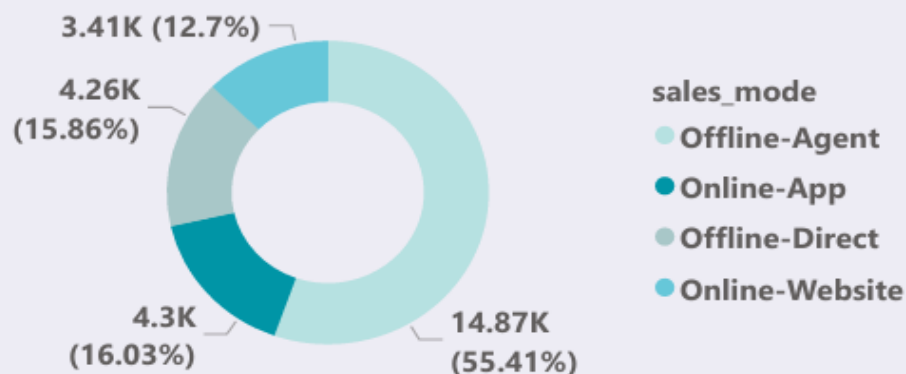
Revenue over time by Sales Mode
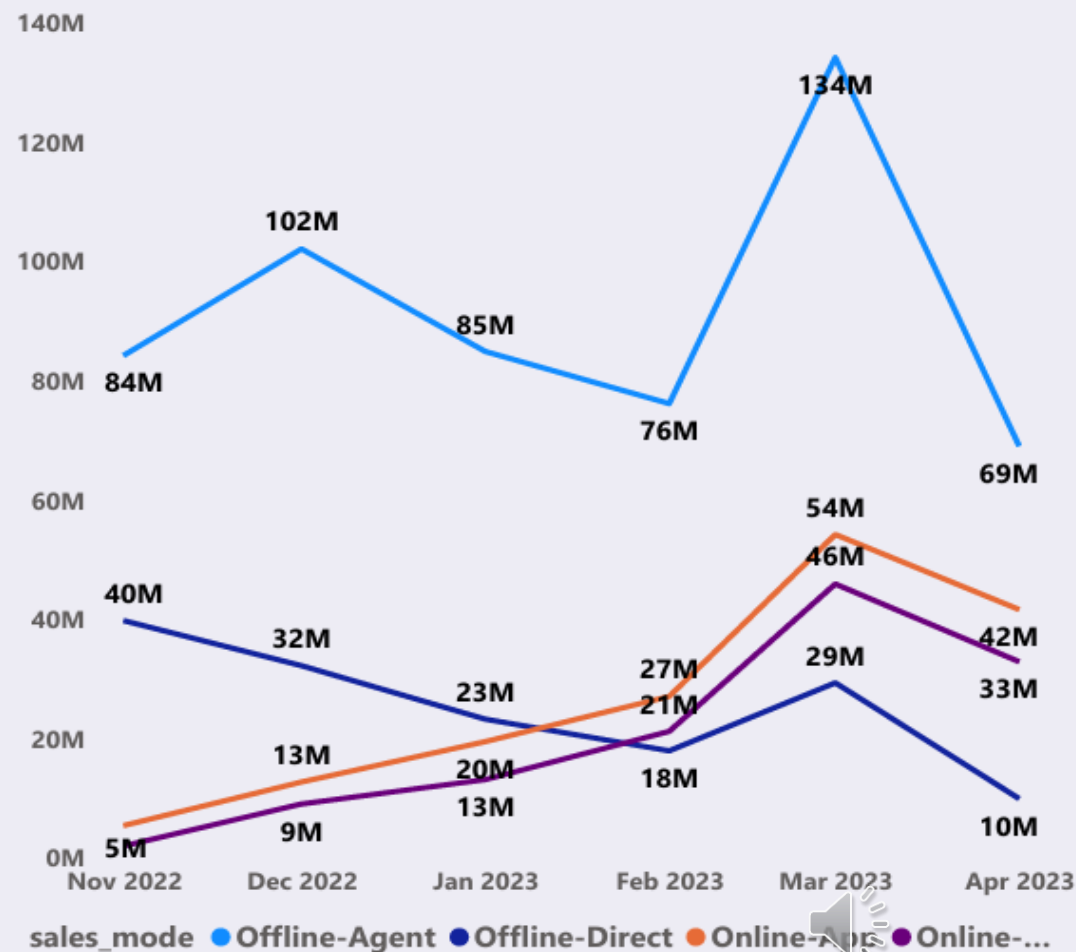
140M

120M

100M

80M

60M

40M

20M

0M

134M

102M

85M

84M

76M

69M

54M

46M

40M

32M

29M

27M

23M

21M

20M

18M

13M

13M

42M

33M

10M

9M

5M

Nov 2022 | Dec 2022 | Jan 2023 | Feb 2023 | Mar 2023 | Apr 2023

sales_mode ● Offline-Agent ● Offline-Direct ● Online-App ● Online-...

Age Group Analysis

Age Group Vs Sales Mode (Total Customers)

Age Group	Offline-Agent	Offline-Direct	Online-App	Online-Website
18-24	1063	321	265	195
25-30	1790	580	466	358
31-40	5647	1583	1761	1469
41-50	3405	927	922	777
51-65	1729	485	493	370
65+	1239	360	395	241
Total	14873	4256	4302	3410

Trend Chart by Age Group

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

November 2022 · December · January · February 2023 · March · April
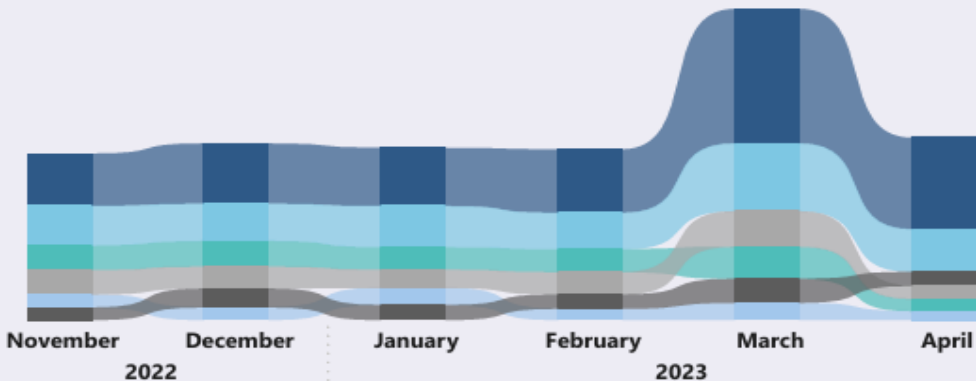
Age Group vs Policy Preference

Age Group	Total_Customers
18-24	1844
25-30	3194
31-40	10460
41-50	6031
51-65	3077
65+	2235
Total	26841

Age Group vs Expected Settlements

65+	51-65	41-50	31-40	25-30	18-24
41.13%	21.70%	13.46%	11.85%	6.07%	5.81%

Age Group vs Customers

Age Group	Customers
18-24	1.8K
25-30	3.2K
31-40	10.5K
41-50	6.0K
51-65	3.1K
65+	2.2K

0K · 5K · 10K

SHIELD INSURANCE
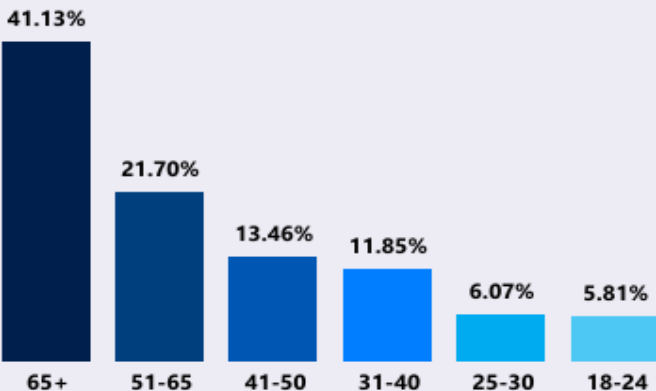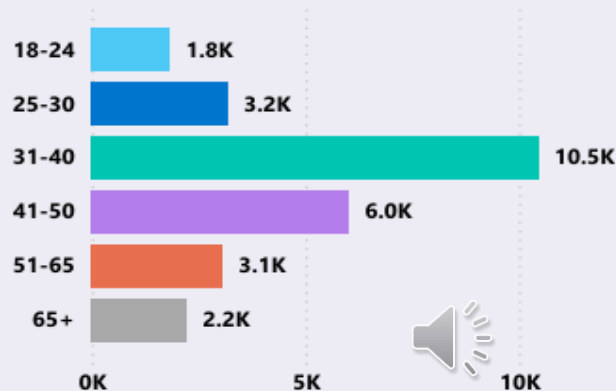
Based on the insights, here are a few key recommendations:

Focus marketing efforts in underperforming cities like Hyderabad and Indore to unlock growth.

Invest in enhancing the mobile app experience, especially for the 18–30 age group.

Continue to strengthen agent-led models for high-value, older customer segments who prefer personal guidance.

Lastly, tailor product offerings based on age and channel preferences — because one size does not fit all in insurance.

Together, these strategies can help Shield Insurance build a stronger balance between traditional trust-based selling and modern, technology-driven convenience — leading to smarter customer engagement and sustained business growth.