



Shield Insurance Dashboard



AtliQ Technologies Internship
Project Presentation
Domain: Insurance

B Ja





Shield Insurance Dashboard



Agenda

- About the Company
- Problem Statement
- Insights
- Recommendations



About Company

- Shield Insurance is a prominent insurance provider operating in five cities across India: Mumbai, Delhi NCR, Chennai, Hyderabad, and Indore.
- To reach a broad customer base, the company employs multiple sales channels, including Offline Agents, Offline Direct, Online App, and Online Websites.
- Shield Insurance provides nine different types of policies to meet the needs of different customers.



Problem Statement

- Shield Insurance seeks to enhance its data-driven decision-making capabilities by implementing a dashboard solution that provides actionable insights into key performance metrics.
- To evaluate the effectiveness of this initiative, Shield Insurance is considering a collaboration with AtliQ Technologies.
- Before committing to a full-scale project, Shield Insurance requires a pilot project to be developed in Power BI. This pilot project will serve as a proof of concept, demonstrating AtliQ Technologies' ability to meet Shield Insurance's specific needs
- The success of this Pilot project will determine the potential for large patnenership and the full deployment of the dashboard solution.





Reset

city
All

sales_mode
All

Policy_id_no
All

Age_group
All

customer_code
All

HomeMain ViewSales ViewAge Group View

Total Revenue
₹ 263.84M

PM 142.64M ▲ 84.97%

Total Customers
7081

PM 3.89K ▲ 82.27%

Daily Revenues
₹ 8.51M

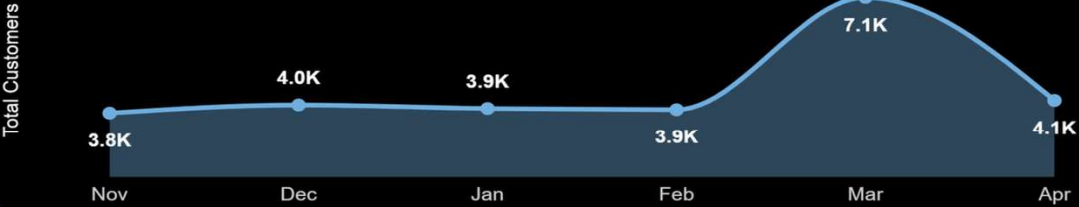
PD 2.96M ▲ 187.56%

Daily Customers
228

PD 97.00 ▲ 135.48%

Total Customers Trend By Month

CustomerRevenue



Revenue and Customers split By City & Age Group

Age_group	Total Customers	Total Revenue
18-24	406	₹ 6M
25-30	750	₹ 14M
31-40	3100	₹ 95M
41-50	1490	₹ 57M
51-65	799	₹ 44M
65+	536	₹ 50M
Total	7081	₹ 264M

city	Total Customers	Total Revenue
Delhi NCR	2920	₹ 109M
Mumbai	1671	₹ 61M
Hyderabad	1149	₹ 44M
Chennai	762	₹ 27M
Indore	579	₹ 22M
Total	7081	₹ 264M

Revenue and Customer Segmentation Overall

city	Age_group	Total Revenue	Total Customers
Delhi NCR	31-40	₹ 39.7M	1297
Delhi NCR	65+	₹ 22.6M	236
Delhi NCR	41-50	₹ 22.6M	619
Mumbai	31-40	₹ 21.4M	707
Delhi NCR	51-65	₹ 16.8M	325
Hyderabad	31-40	₹ 14.9M	512
Mumbai	41-50	₹ 12.9M	340
Mumbai	51-65	₹ 11.2M	201
Chennai	31-40	₹ 11.0M	343
Mumbai	65+	₹ 10.2M	124
Hyderabad	41-50	₹ 10.1M	252
Hyderabad	65+	₹ 9.5M	84
Total		₹ 263.8M	7081

NovDecJanFebMarApr

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

PM - Previous Month , PD - Previous Day

Black Back Ground Indicates Selection of Filters and Buttons

Go backMain View

Insurance | Data updated

122%



Clear all

city

All

sales_mode

All

Policy_id_no

All

Age_group

All

customer_code

All

Home

Main View

Sales View

Age Group View

Year

All

month

All

Total Revenue

₹ 989.25M

PM Not Available --

Settlement %

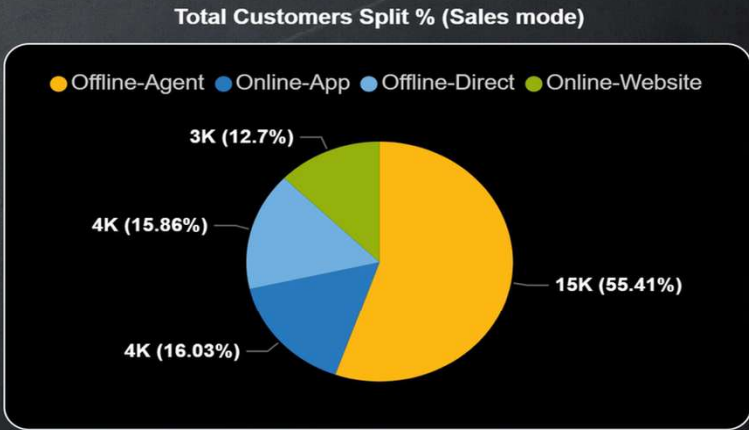
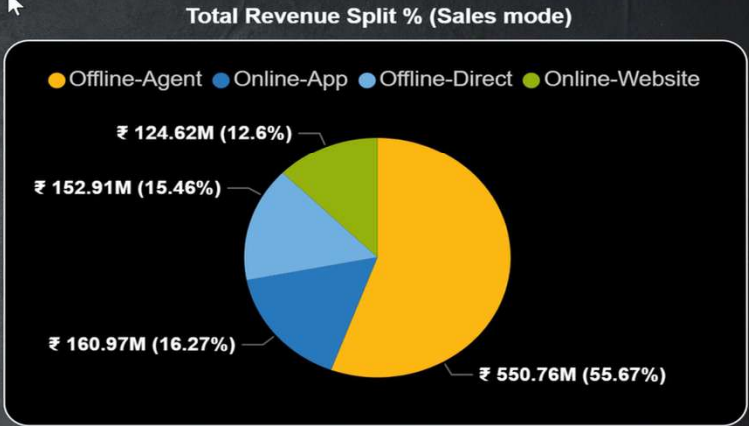
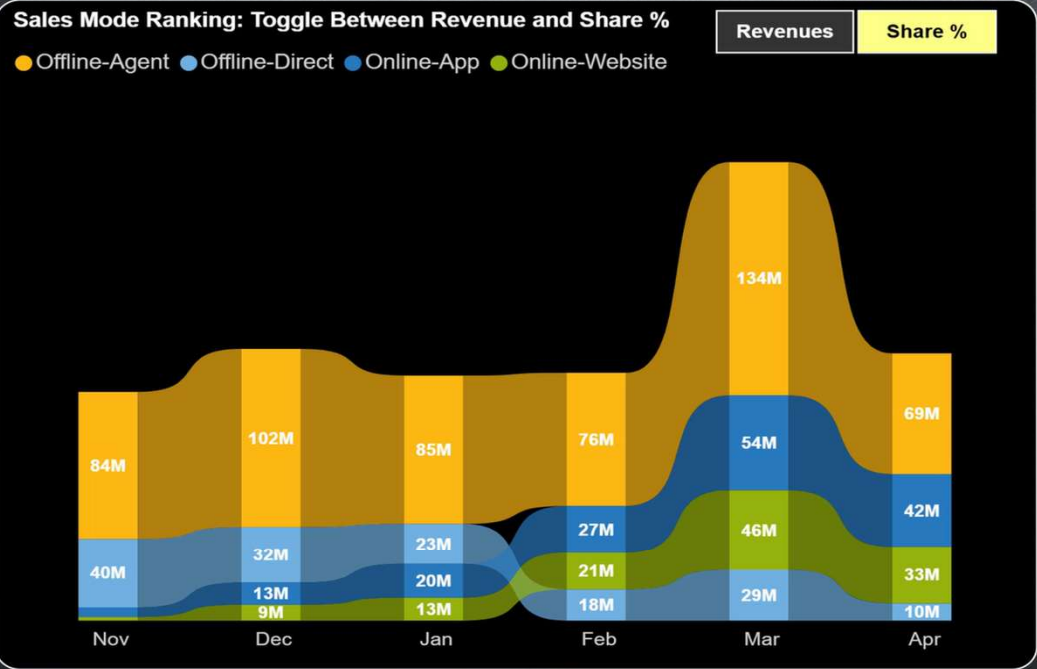
56.04%

PM Not Available --

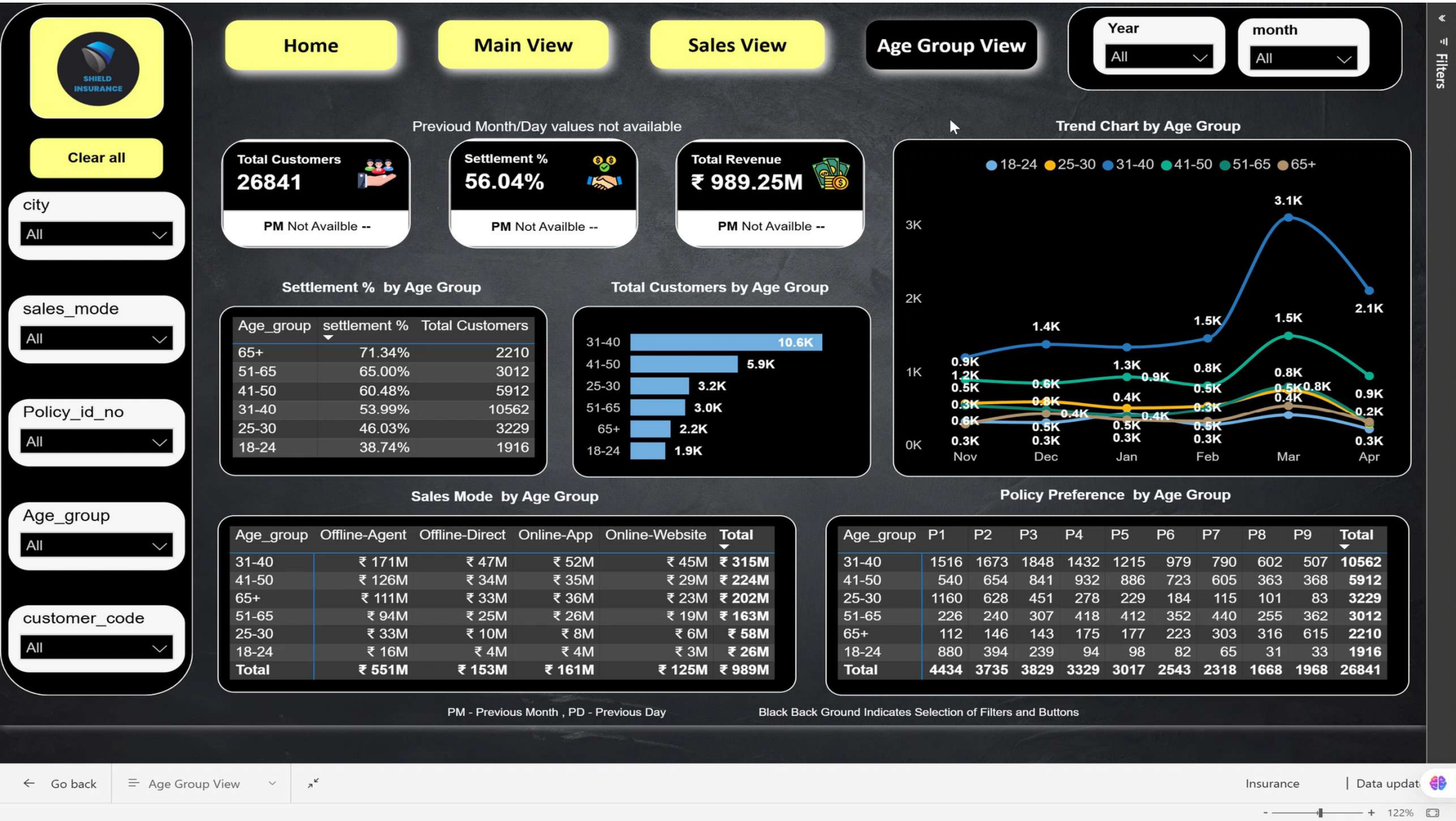
Total Customers

26841

PM Not Available --

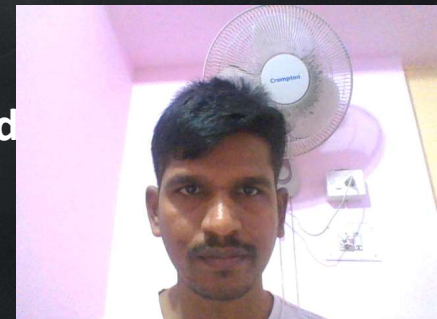


PM - Previous Month , PD - Previous Day Black Back Ground Indicates Selection of Filters and Buttons



Key Business Insights

- Shield Insurance saw tremendous growth. In the month of March alone, the company acquired 7,081 customers and generated ₹263.84M in total revenue. The average daily revenue stood at ₹8.51M.
- Offline Agents, the initially dominant sales mode, declined from 63.98% in November to 44.94% in April.
- Meanwhile, Online App sales rose significantly from 4.18% in November to 27.12% in April, reflecting a strong shift toward digital channels.
- The 31–40 age group had the highest customer count with 10,562, while the 18–24 group had the lowest with 1,916.
- Policy P1 was the most purchased policy, whereas Policy P8 was the least preferred



Key Strategic Recommendations

- **Focus on the 18–24 and 25–30 age group:** Engage the 18–30 age group by raising awareness and focusing marketing efforts to attract this group through online platforms and digital campaigns.
- **Accelerate digital adoption via online app:** Leverage the online app sales growth (4.18% → 27.12%) by improving app UX, offering exclusive discounts, and gamifying user engagement.
- **To revive offline agent performance,** introduce hybrid tools, provide ongoing training, and launch community-focused initiatives to help agents improve sales.
- **Maximize Value from the 31–40 Segment:** We have the highest number of customers in the 31–40 age group. Let's build loyalty, offer premium plans, and connect with their financial needs.
- **Improve Product Choices Based on Customer Preferences:** Focus more on promoting what is popular, and review Policy P8 to see if it needs improvement or should be removed based on customer interest.



Key Strategic Recommendations

- **Use seasonal campaigns in April & November:** Since growth slows during April and November, introduce timely promotions, bundled offers, and targeted campaigns in these months.
- **Improve digital platforms:** Enhance the app and website to ensure seamless navigation, personalized product discovery, and fast onboarding experiences.
- **Enable seamless online-offline integration:** Allow customers to start purchases online and finish offline, combining convenience with trust through unified workflows.
- **Localized campaigns for underserved cities:** Run influencer-driven awareness campaigns in mid-tier cities (e.g., Indore) where growth potential is high but currently underutilized.
- **Loyalty and retention strategy:** Implement renewal reminders, cashback offers, and to improve long-term customer retention.



Thank you

