# SHIELD INSURANCE

**HOME**

**GENERAL VIEW**

To get an overview of all metrics such as KPIs, revenue performance, and customer segmentation

**SALES MODE ANALYSIS**

Analysis of the sales model that highlights the effectiveness in generating revenue and customer base.

**AGE GROUP ANALYSIS**

Analysis on the basis of the age group to extract insights about annual settlements, customer trends, preferred policies, and sales model.

# GENERAL VIEW

Apr_23 | Dec_22 | Feb_23 | Jan_23 | Mar_23 | Nov_22

City: All | Age Group: All | Sales Mode: All | Policy ID: All

**Total Customer**

27K

LM : 0.00%

**Revenue**

989M

LM : 0.00%

**DCG**

148

LD : 0.00%

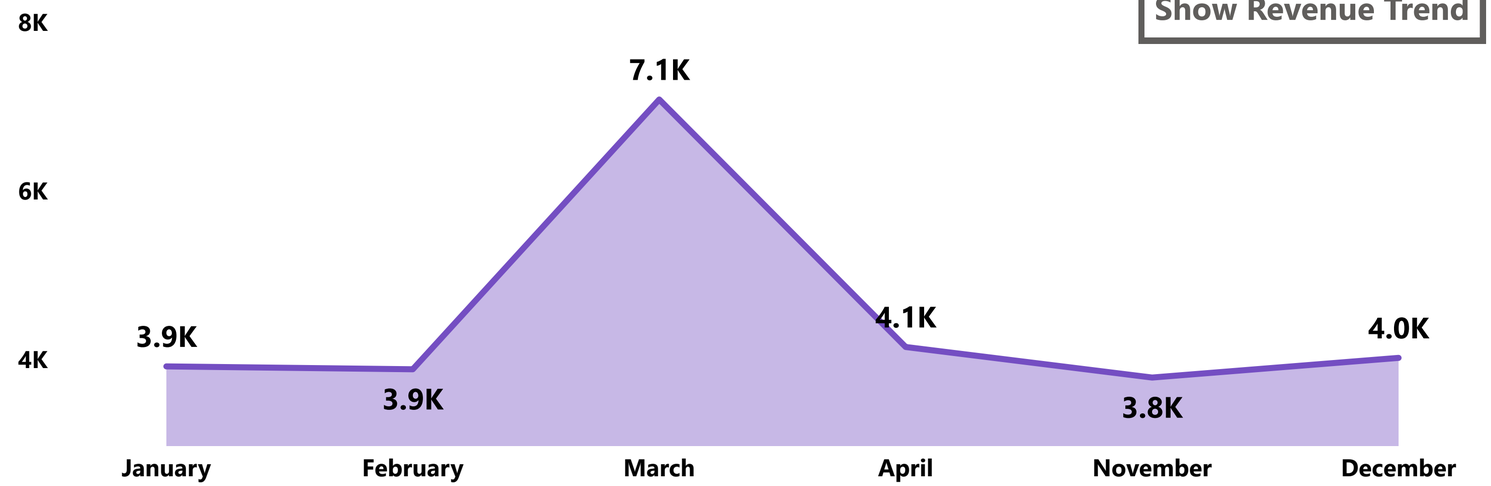
**DRG**

5.47M

LD : 0.00%

## Customer Performance Over Time

Show Revenue Trend




## Customer segmentation by City & Age

| city | Revenue | Total Customer |
|---|---|---|
| Delhi NCR | 402M | 11007 |
| Mumbai | 240M | 6432 |
| Hyderabad | 161M | 4340 |
| Chennai | 106M | 2966 |
| Indore | 81M | 2096 |
| Total | 989M | 26841 |

## Split By age Group

| age_group | Revenue | Total_customer |
|---|---|---|
| 31-40 | 335M | 10956 |
| 41-50 | 211M | 5385 |
| 65+ | 195M | 2083 |
| 51-65 | 157M | 2796 |
| 25-30 | 61M | 3399 |
| 18-24 | 30M | 2222 |
| Total | 989M | 26841 |

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LM : Last Month (MOM change), LD : Last Day(DOD change)

# SALES MODE ANALYSIS

Apr_23 | Dec_22 | Feb_23 | Jan_23 | Mar_23 | Nov_22

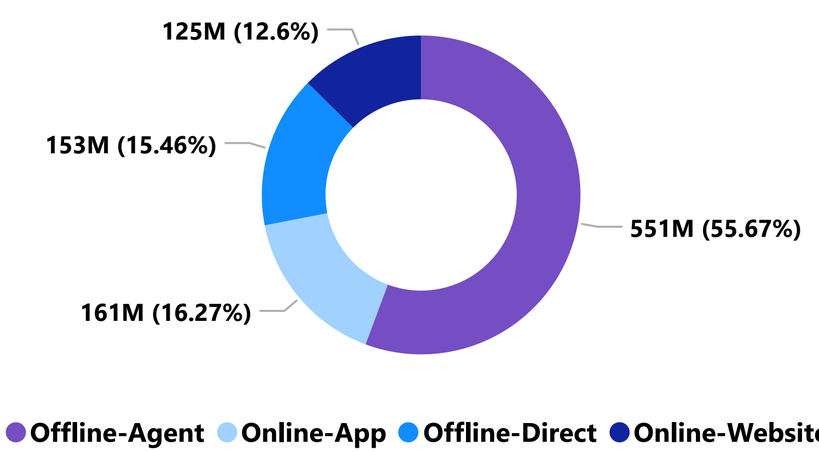
City: All

Age Group: All

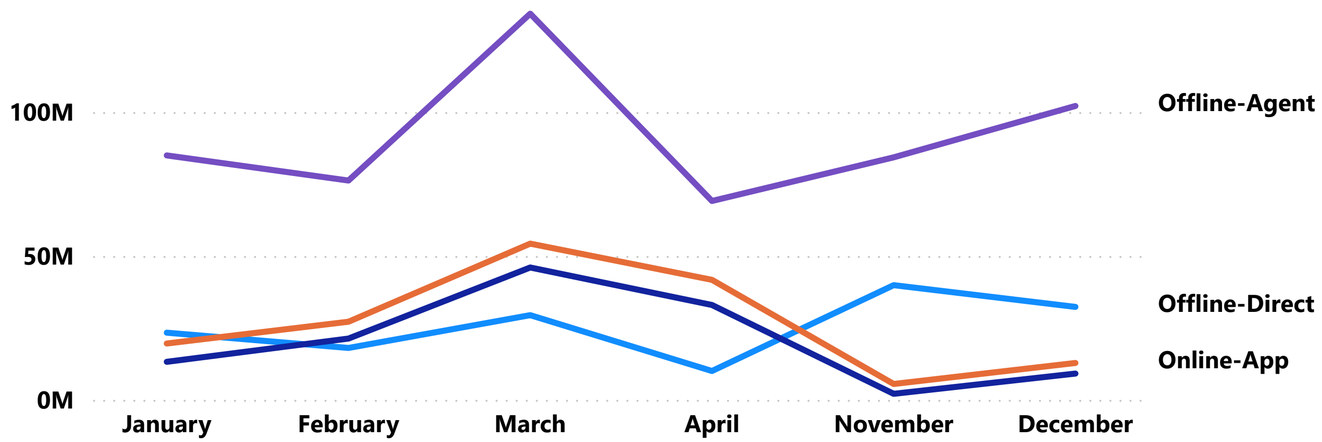
Sales Mode: All

Policy ID: All

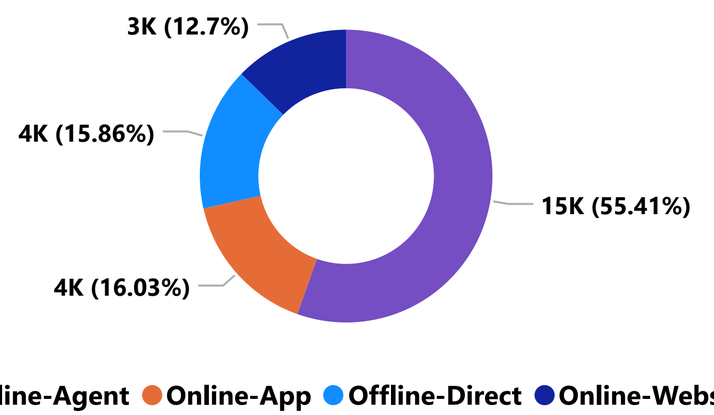
## Revenue by Sales Mode




## Sales Mode Performance Over Time




## Total_customer by Sales Mode




## Sales Mode vs Policy Preferance By Revenue

| policy_id | Offline-Agent | Offline-Direct | Online-App | Online-Website |
|---|---|---|---|---|
| POL1048HEL | 93.9M | 23.1M | 29.7M | 21.2M |
| POL2005HEL | 182.3M | 50.7M | 51.6M | 39.6M |
| POL3309HEL | 29.9M | 8.9M | 9.7M | 7.4M |
| POL4321HEL | 14.2M | 4.0M | 4.0M | 3.3M |
| POL4331HEL | 18.0M | 5.5M | 5.3M | 4.6M |
| POL5319HEL | 39.8M | 10.9M | 10.9M | 8.0M |
| POL6093HEL | 56.6M | 16.8M | 15.7M | 13.5M |
| POL6303HEL | 46.0M | 12.5M | 13.0M | 10.3M |
| POL9221HEL | 70.0M | 20.6M | 20.9M | 16.8M |

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# AGE GROUP ANALYSIS

Apr_23 | Dec_22 | Feb_23 | Jan_23 | Mar_23 | Nov_22

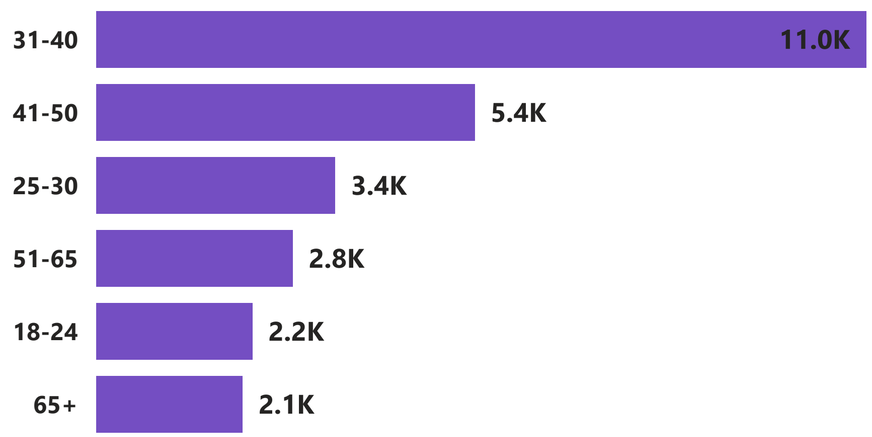
City: All

Age Group: All

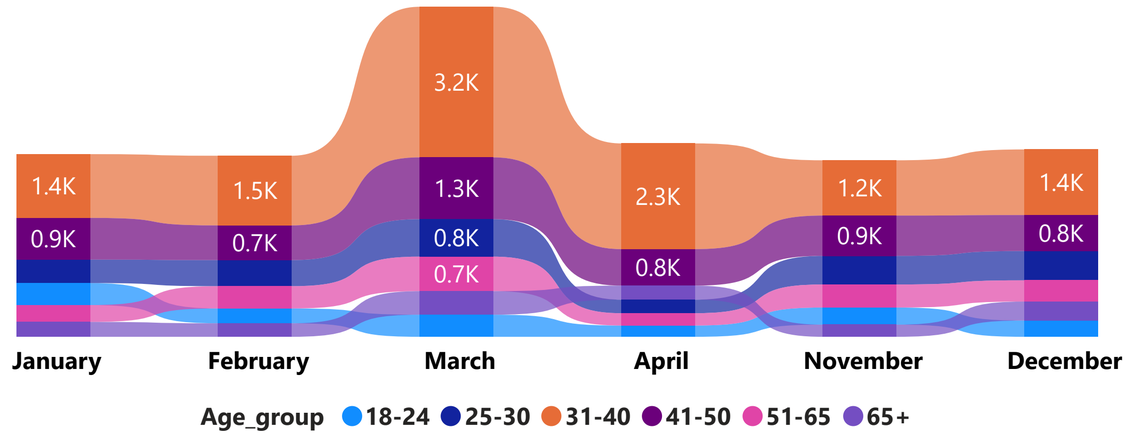
Sales Mode: All

Policy ID: All

## Total_customer by age_group




## Sales Mode Trend by Age Group




## Age Group Vs Sales Mode By Total Customer

| age_group | Offline-Agent | Offline-Direct | Online-App | Online-Website |
|---|---|---|---|---|
| 18-24 | 1272 | 390 | 321 | 239 |
| 25-30 | 1920 | 611 | 490 | 378 |
| 31-40 | 5900 | 1631 | 1866 | 1559 |
| 41-50 | 3036 | 849 | 819 | 681 |
| 51-65 | 1600 | 434 | 432 | 330 |
| 65+ | 1145 | 341 | 374 | 223 |
| Total | 14873 | 4256 | 4302 | 3410 |

## Age Group Vs Policy Preferance By customers

| policy_id | 18-24 | 25-30 | 31-40 | 41-50 | 51-65 | 65+ |
|---|---|---|---|---|---|---|
| POL1048HEL | 40 | 109 | 631 | 340 | 242 | 306 |
| POL2005HEL | 38 | 84 | 542 | 352 | 358 | 594 |
| POL3309HEL | 276 | 487 | 1932 | 720 | 289 | 125 |
| POL4321HEL | 1034 | 1176 | 1456 | 453 | 210 | 105 |
| POL4331HEL | 454 | 658 | 1687 | 594 | 207 | 135 |
| POL5319HEL | 107 | 319 | 1506 | 866 | 362 | 169 |
| Total | 2222 | 3399 | 10956 | 5385 | 2796 | 2083 |

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