



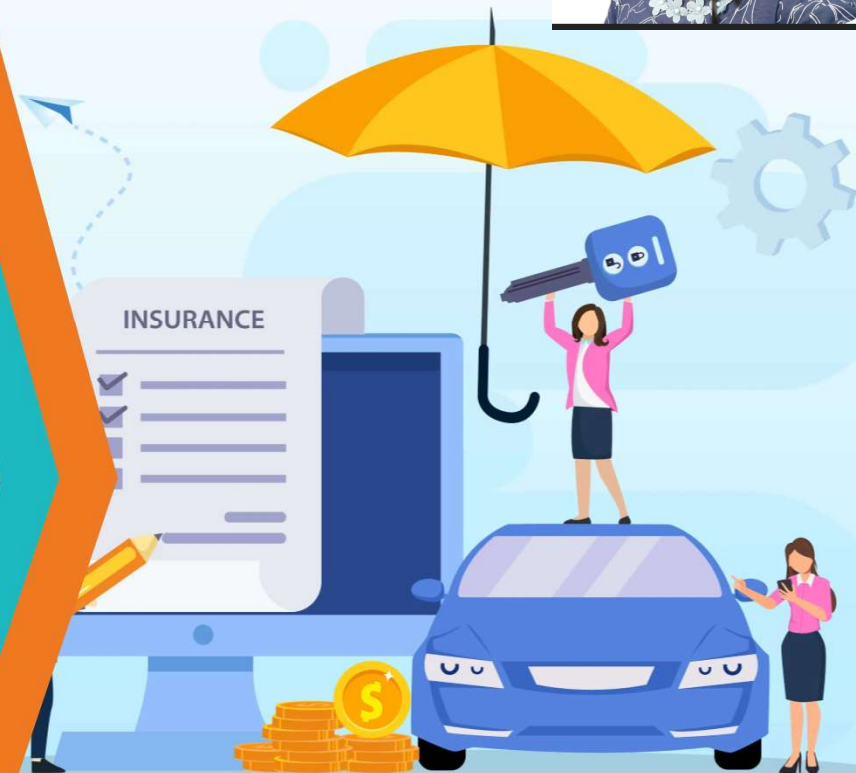
Shield Insurance



Codebasics Virtual
Internship



Data Analyst Intern at
AtliQ Technology



Presented by Khushboo Rani

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.

Task

My role as a Data Analyst Intern is to talk with the client, study the data, and build a smart dashboard tailored to their needs.



About Shield Insurance

Shield Insurance is famous for giving all-encompassing insurance that protects people from unexpected things in life. They're trusted because they're really committed to providing dependable coverage

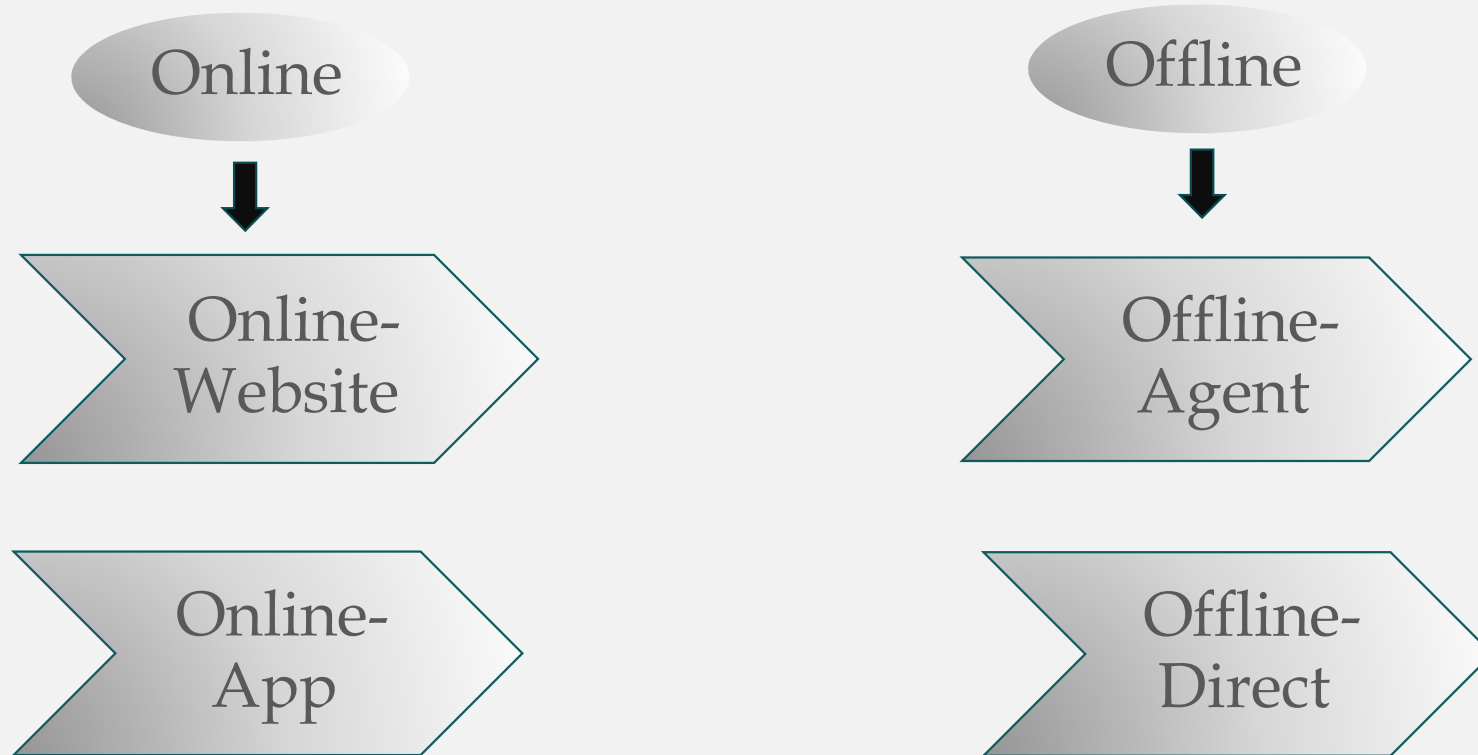


Policies

policy_id ▾	base_coverage_amt(INR) ▾	base_premium_amt(INR) ▾
POL4321HEL	200000	5000
POL4331HEL	300000	7500
POL3309HEL	500000	12000
POL5319HEL	750000	16700
POL6303HEL	1000000	21500
POL6093HEL	1500000	31700
POL9221HEL	2500000	42500
POL1048HEL	5000000	76500
POL2005HEL	10000000	120000

Shield Insurance provides a total of 9 policies

Sales Mode



Cities

Delhi
NCR

Indore

Mumbai

Hyderabad

Chennai

Dataset

1. Dim_customer
2. Dim_policies
3. Dim_date
4. Fact_Premium
5. Fact_Settlement

Data was available from nov 2022 till apr 2023



Let's Explore Dashboard





Shield Insurance Project



HOME



GENERAL VIEW

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



SALES MODE ANALYSIS

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



AGE GROUP ANALYSIS

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

General View

Data Is Not Available for Selected Filter

Monthly Customers Growth

3787✓

LM: (Blank) (+Infinity%)

Monthly Revenue Growth

131.69M✓

LM: (Blank) (+Infinity%)

Daily Customers Growth

340✓

LD: 225 (+51.11%)

Daily Revenue Growth

13.21M✓

LD: 8.04M (+64.39%)

Customer Segment

city	AgeGroup	Total Customer	Total Revenue
Delhi NCR	31-40	4741	146.49M
Mumbai	31-40	2703	84.62M
Delhi NCR	41-50	1899	77.61M
Delhi NCR	65+	801	75.29M
Delhi NCR	51-65	1030	59.98M
Hyderabad	31-40	1886	58.09M
Mumbai	41-50	1130	47.60M
Mumbai	65+	457	43.52M
Mumbai	51-65	632	37.60M
Chennai	31-40	1236	36.98M
Hyderabad	41-50	765	33.46M
Total		26841	989.25M

date

All

city

All

AgeGroup

All

policy_id

All

sales_mode

All

Nov-22

Dec-22

Jan-23

Feb-23

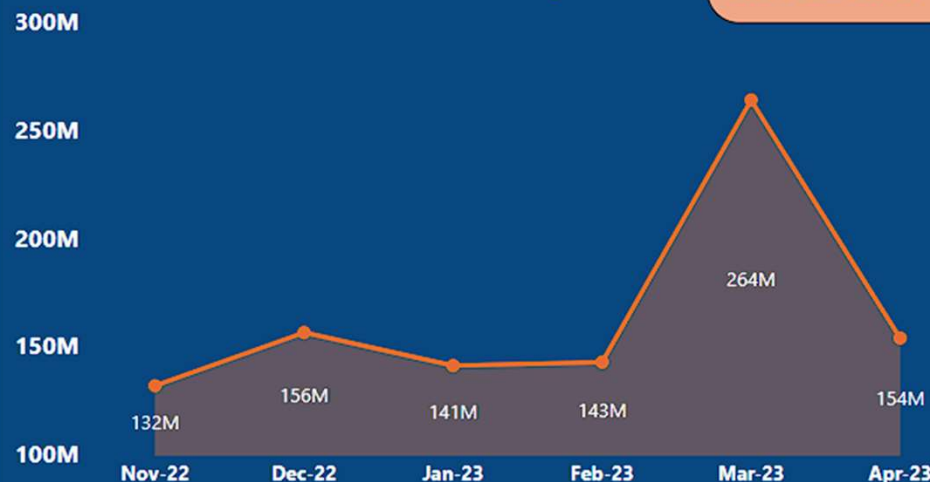
Mar-23

Apr-23

Clear all slicers

Revenue Trend By Month

Show Customer



City Wise Split

city	Customers	Revenue
Delhi NCR	11.007K	401.57M
Mumbai	6.432K	239.51M
Hyderabad	4.34K	160.52M
Chennai	2.966K	106.31M
Indore	2.096K	81.35M

Age-Group Wise Split

AgeGroup	Customers	Revenue
31-40	11.455K	356.03M
41-50	4.699K	196.02M
65+	1.919K	184.89M
51-65	2.511K	148.41M
25-30	3.617K	67.71M
18-24	2.64K	36.19M

LM- Last Month LD- Last Day

Sales Mode Analysis

Clear all slicers

Nov-22

Dec-22

Jan-23

Feb-23

Mar-23

Apr-23

city

All

policy_id

All

AgeGroup

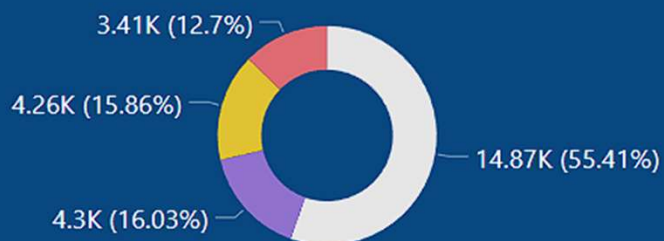
All

sales_mode

All

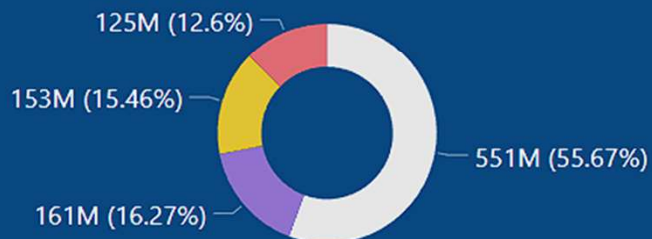
Total Customers By Sales Mode

● Offline-Agent ● Online-App ● Offline-Direct ● Online-Website



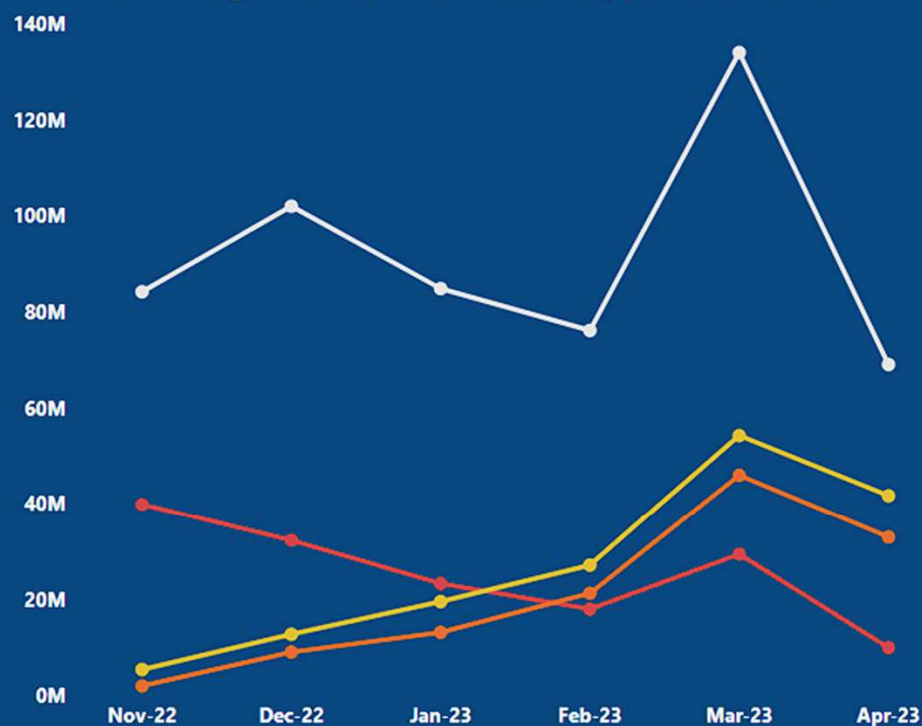
Total Revenue By Sales Mode

● Offline-Agent ● Online-App ● Offline-Direct ● Online-Website



Sales Mode Trend By Month

● Offline-Agent ● Offline-Direct ● Online-App ● Online-Website



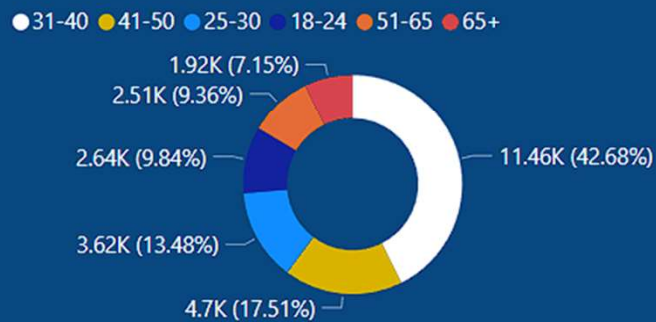
Age Group Analysis

Nov-22 Dec-22 Jan-23 Feb-23 Mar-23 Apr-23

Age Group vs Policy Preference

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL4321HEL	1223	1172	1405	351	187	96	4434
POL3309HEL	315	555	2026	571	256	106	3829
POL4331HEL	551	679	1741	460	179	125	3735
POL5319HEL	134	347	1628	755	314	151	3329
POL6303HEL	131	281	1383	772	314	136	3017
POL6093HEL	111	223	1114	633	273	189	2543
POL9221HEL	83	147	921	511	406	250	2318
POL2005HEL	47	86	578	333	354	570	1968
POL1048HEL	45	127	659	313	228	296	1668
Total	2640	3617	11455	4699	2511	1919	26841

Age Group vs Sales Mode



city

All

policy_id

All

AgeGroup

All

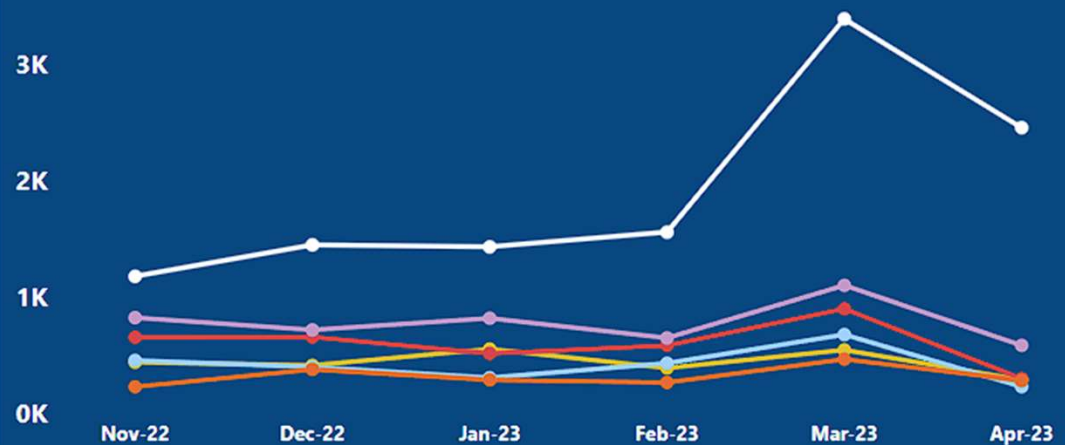
sales_mode

All

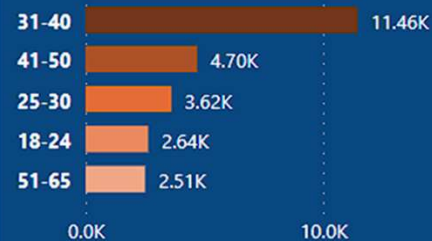
Clear all slicers

Customers Trend By Age Group

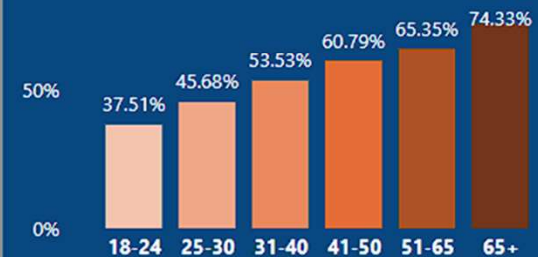
18-24 25-30 31-40 41-50 51-65 65+



Total Customers By Age Group



Age Group vs Expected Settlement %



Insights

- 1.March 2023 Performance Peak:** Witnessed the highest revenue and customer acquisition.
- 2.Delhi NCR Dominance:** Led in revenue and customer acquisition among all cities.
- 3.Key Age Group Contribution:** The 31-40 age group significantly contributed to both revenue and customer base
- 4..
- 5.Sales Mode Impact:** Offline-Agent sales mode attracted the most customers and generated the highest revenue.
- 6.Online Sales Dynamics:** Online App and Website showed revenue growth from Feb 2023, while Offline-Direct declined.
- 7.Popular Policy:** Policy 'POL4321HEL' with a base premium of ₹5,000/- gathered a customer base exceeding 4000.
- 8.Age Group Preference:** The 31-40 age group appeared as the prominent customer base across all policies.

Recommendations

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



Dhaval Patel



Hemanand Vadivel

THANK YOU