Summary:

This project involved developing a Tableau-based vehicle insurance cross-sell analysis dashboard that provides insights into customer demographics, insurance status, and vehicle damage patterns. The dashboard helps insurance companies identify opportunities for cross-selling vehicle insurance to existing health insurance clients.

Client Requirements:

The client required a Vehicle Insurance Analysis Dashboard with the following objectives:

1. Client Overview: Track total clients with health insurance

2. Insurance Status: Monitor previous vehicle insurance coverage

3. Cross-sell Potential: Identify clients interested in vehicle insurance

4. Premium Analysis: Display average premiums for undamaged vehicles

5. Demographic Analysis: Break down clients by gender and age

6. Vehicle Analysis: Track vehicle age and damage statistics

7. Age Distribution: Visualize client age-wise vehicle count

8. Damage Assessment: Monitor vehicle damage percentages by age

Stakeholders:

1. Insurance Sales Teams

2. Marketing Department

3. Risk Assessment Teams

4. Customer Service Representatives

5. Product Managers

6. Actuarial Teams

7. Business Development Managers

8. Executive Leadership

Steps in Project:

1. Insurance Data Collection

2. Data Cleaning and Validation

3. Tableau Model Development

4. Dashboard Layout Design

5. Visualization Creation

6. Filter Implementation

7. Quality Testing

8. Documentation and Deployment

Insights and Final Outcome:

1. Client Base: 381.11K clients have health insurance

2. Market Opportunity: 174.6K clients without previous vehicle insurance

3. Interest Level: 46.7K clients interested in vehicle insurance

4. Premium Value: Average premium of 30.56K for undamaged cars

5. Gender Distribution: 206K male and 175K female clients

6. Age Analysis: Highest vehicle count in 24-year age group (83,161)

7. Vehicle Damage: 99.91% damage rate for vehicles >2 years old

8. Age Patterns: Significant decline in vehicle ownership after age 48