

SHIELD INSURANCE ANALYSIS

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Contents

- ► About Data
- ► About Company
- Live Dashboard
- **►** Insights
- > Recommendations

Dimension Tables Dim_date

Dim_customer

Dim_policies

Understanding DATA

Fact Tables Fact_settlements

Fact_premiums

Dataset that was shared with us was from **November 2022- April 2023**

ABOUT COMPANY

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

Delhi NCR Hyderabad Mumbai Chennai Indore

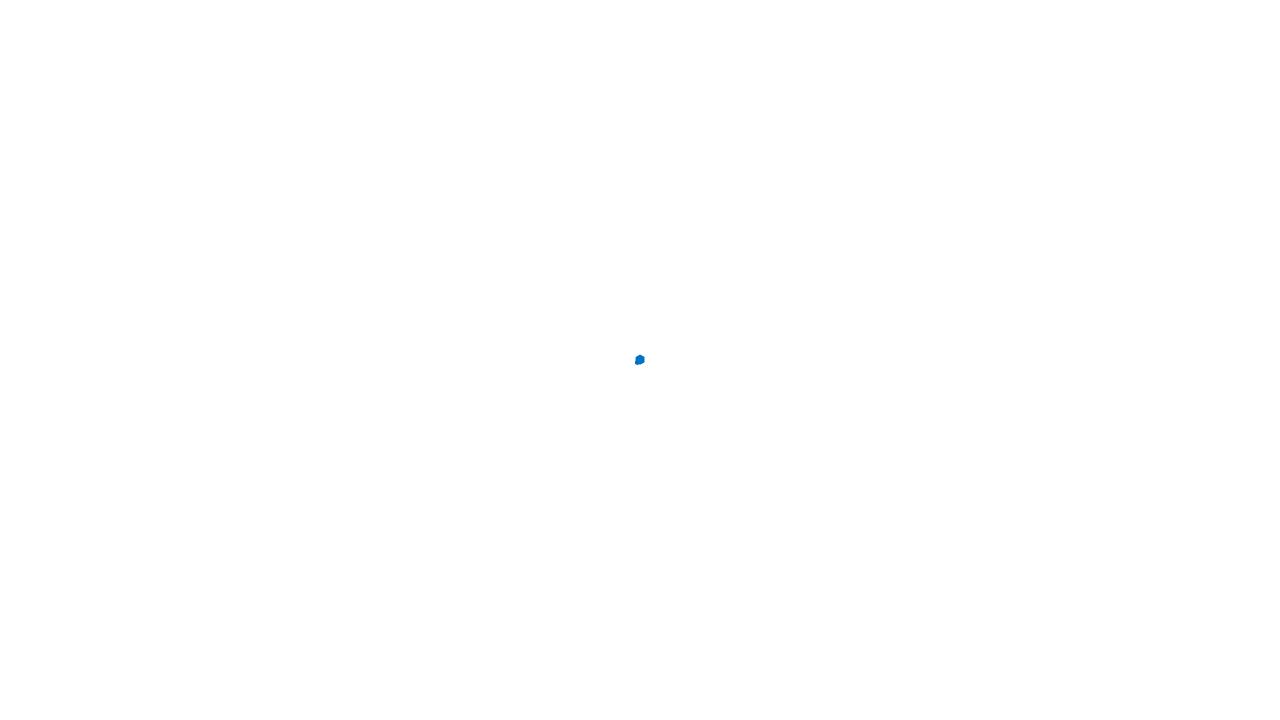
Offline-Agent
Offline-Direct
Online-App
Online-Website

We possess a total of nine distinct policies, and their performance has undergone comprehensive analysis across various factors

Operates in 5 major cities

➤ 4 different Sales Mode

Lets Explore Dashboard



INSIGHTS

- Delhi NCR and the 31–40 age group are top contributors:
 11K customers and ₹401M revenue from Delhi NCR
 4.7K customers and ₹146M revenue from age group 31–40
- ➤ Offline-Agent is the highest performing sales mode with: 15K customers (55%) and ₹551M revenue (56%) Top-performing channel by far
- ➤ March 2023 saw a major spike in Customers (7.1K) and revenue (264M) likely campaign-driven or due to channel pushes
- ➤ **POL4321HEL** is the most preferred policy:

 Over **4.4K policies sold**, most popular among ages 31–50
- Settlement expectation rises with age:
 65+ Age group expects 71.16% but has lowest participation (1.9K customers)
- Conline channels (App + Website) together account for ₹286M revenue and 7K customers important but still far behind Offline-Agent

RECOMMENDATIONS

- Focus on Offline-Agent channel it's your best performer in both revenue and customer count.
- Promote in Delhi NCR and to 31–40 age group, since they bring the highest value.
- Understand what worked in March and try to repeat that success in future months.
- ➤ Push POL4321HEL more, especially to mid-age customers who already like it.
- ➤ Educate and target senior citizens (65+) they expect more but aren't engaged enough.
- Improve Online channels (App & Website) to grow faster and catch up with offline sales.



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