



SHIELD INSURANCE ANALYSIS

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Understanding DATA

**Dimension
Tables**

Dim_date

Dim_customer

Dim_policies

**Fact
Tables**

Fact_settlements

Fact_premiums

Dataset that was shared with us was from **November 2022- April2023**

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)
- **Online 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.



thank
you

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