



SHIELD INSURANCE ANALYSIS

Internship
Project with
Power BI



GENERAL ANALYSIS

This section provides an overview of key business metrics, including total customers, total revenue, daily revenue growth, and daily customer growth. These insights help track overall business performance and customer trends over time.



CUSTOMER ANALYSIS

This section provides insights into customer behaviour based on different age groups. It includes analysis on estimated settlement amounts, customer trends over time, sales mode preferences by age group, and policy preferences. These insights help in understanding how different age groups interact with the business, allowing for better decision-making in policy offerings and customer engagement strategies.



SALES MODE ANALYSIS

This section provides a detailed breakdown of customer and revenue distribution across different sales modes. It includes insights into total customers and revenue split percentages by sales mode, along with monthly trends in sales performance. These insights help in understanding customer preferences and optimizing sales strategies.



General Analysis View

HOME

GENERAL ANALYSIS

SALES MODE ANALYSIS

CUSTOMER ANALYSIS

Select Month

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

Select Policy ID

All

Select Sales Mode

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

Abbreviation

- LM -> Last Month
- DRG -> Daily Revenue Growth
- DCG -> Daily Customer Growth

Total Revenue

989M

Average: 5 M

Total Customers

27K

Average: 148

Daily Revenue Growth

5M

Average: 5 M

Daily Customer Growth

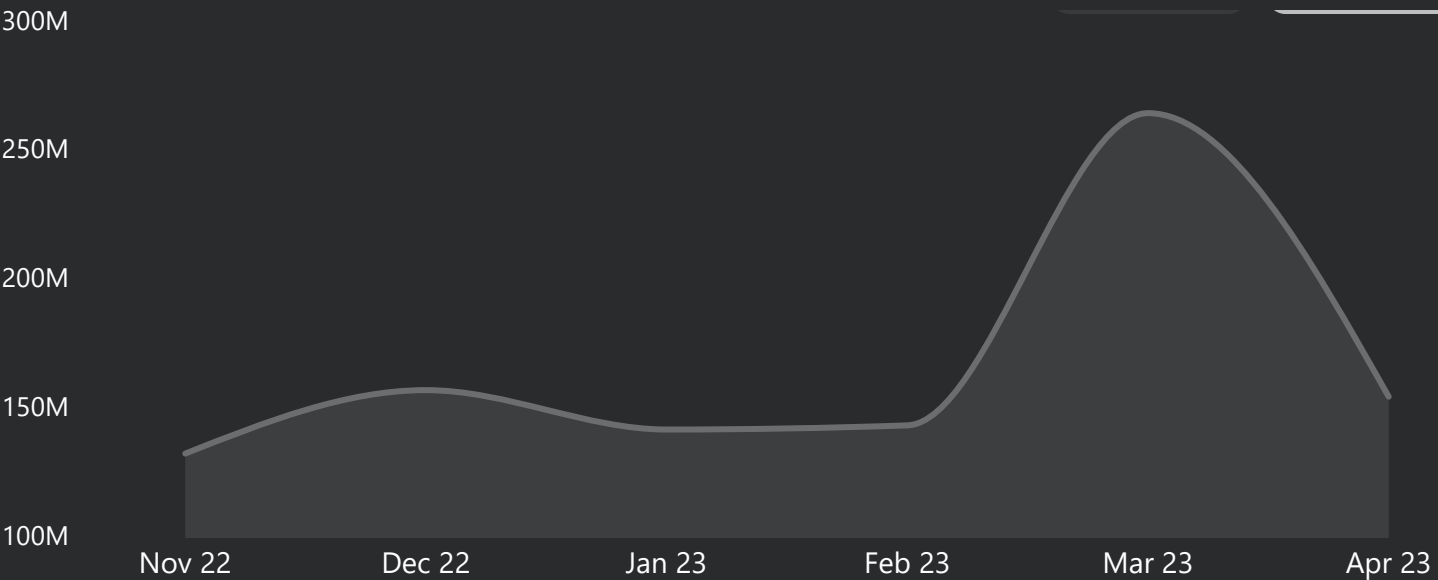
148

Average: 148

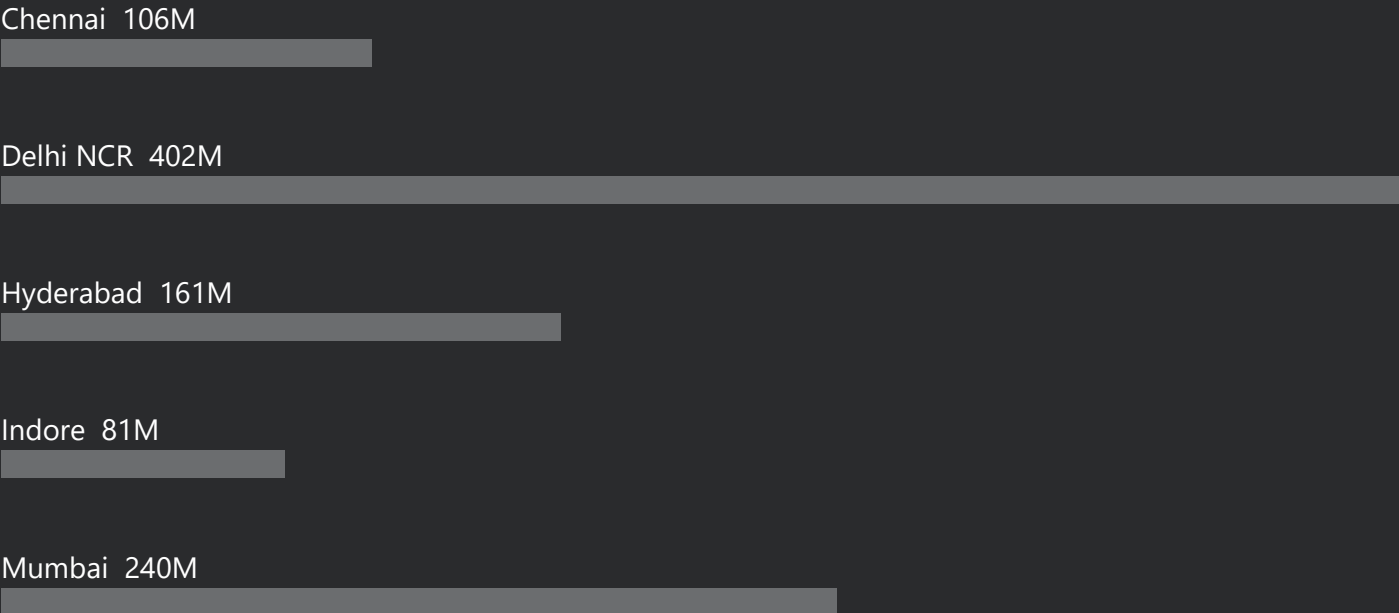
Customer Segmentation

City	Age Group	Total Revenue	Total Customers
Delhi NCR	31-40	128M	4361
Delhi NCR	41-50	90M	2469
Mumbai	31-40	73M	2446
Hyderabad	31-40	51M	1697
Mumbai	41-50	55M	1437
Delhi NCR	25-30	24M	1267
Delhi NCR	51-65	67M	1241
Chennai	31-40	32M	1140
Hyderabad	41-50	39M	1002
Delhi NCR	65+	83M	920
Indore	31-40	27M	816
Mumbai	51-65	42M	783
Mumbai	25-30	14M	771
Delhi NCR	18-24	10M	749
Chennai	41-50	25M	672
Mumbai	65+	48M	540
Hyderabad	25-30	8M	506

Revenue Trends



Revenue by City





Sales Analysis View

HOME

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Abbreviation

LM -> Last Month

Total Revenue

989M

Average: 5 M

Total Customers

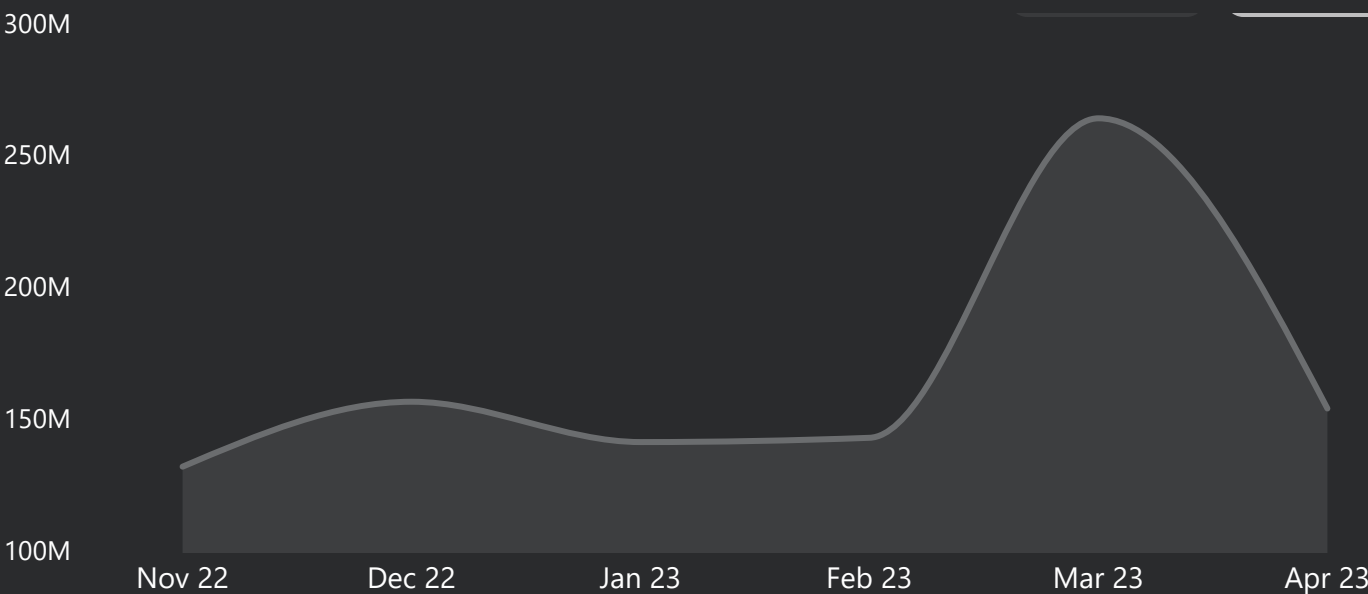
27K

Average: 148

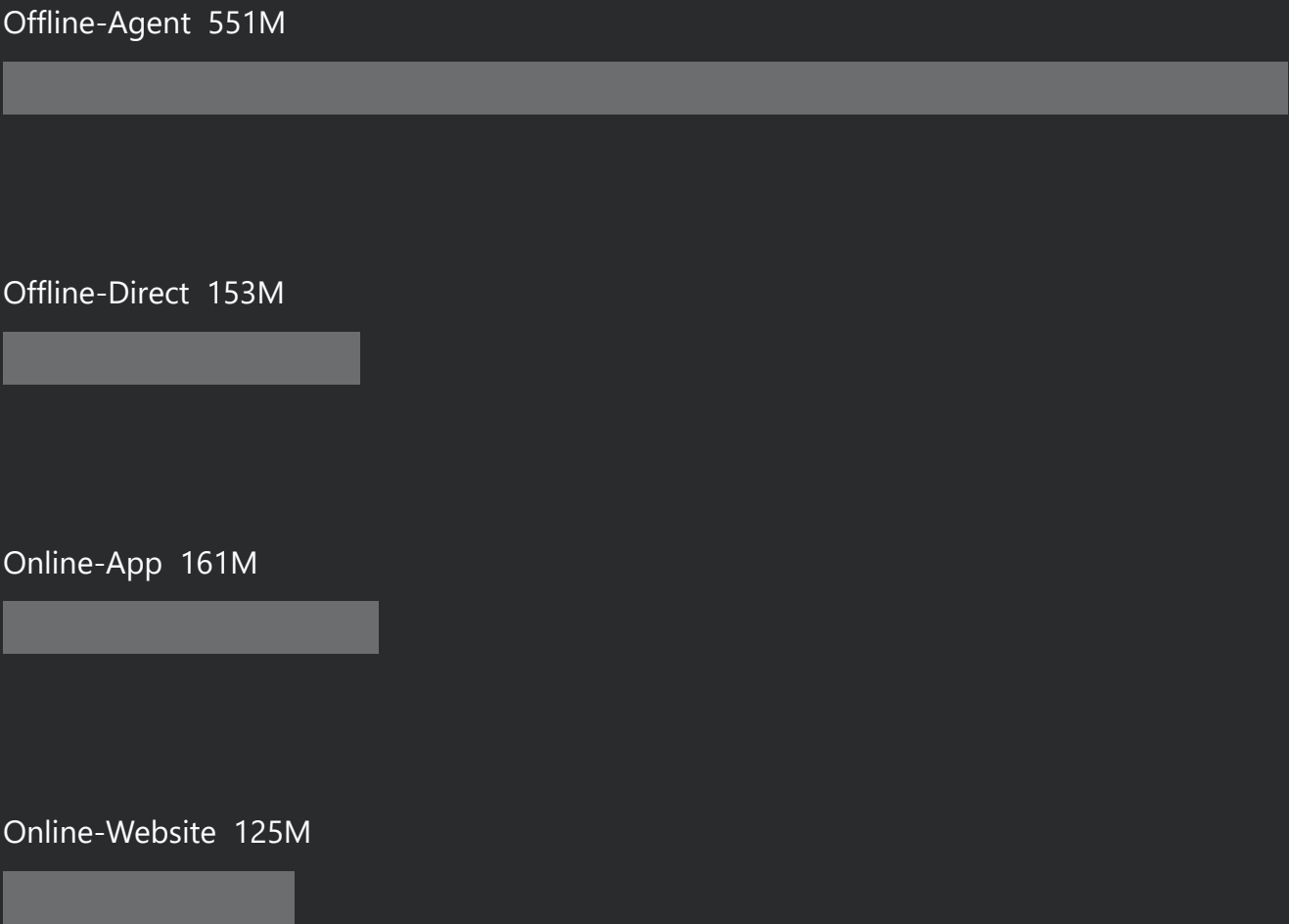
Policy Sales Summary

Policy ID	Sales Mode	Total Revenue	Total Customers
POL4321HEL	Offline-Agent	14M	2478
POL3309HEL	Offline-Agent	30M	2053
POL4331HEL	Offline-Agent	18M	2017
POL5319HEL	Offline-Agent	40M	1905
POL6303HEL	Offline-Agent	46M	1700
POL6093HEL	Offline-Agent	57M	1406
POL9221HEL	Offline-Agent	70M	1266
POL2005HEL	Offline-Agent	182M	1112
POL1048HEL	Offline-Agent	94M	936
POL4321HEL	Offline-Direct	4M	699
POL4321HEL	Online-App	4M	698
POL3309HEL	Online-App	10M	662
POL4331HEL	Offline-Direct	6M	622
POL3309HEL	Offline-Direct	9M	611
POL4331HEL	Online-App	5M	587
POL4321HEL	Online-Website	3M	559
Total		989M	26841

Revenue Trends



Revenue by Sales Mode





Customer Analysis View

HOME

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SALES MODE ANALYSIS

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Select Month

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Select Policy ID

All

Total Revenue

989M

Average: 5 M

Settlement Amount

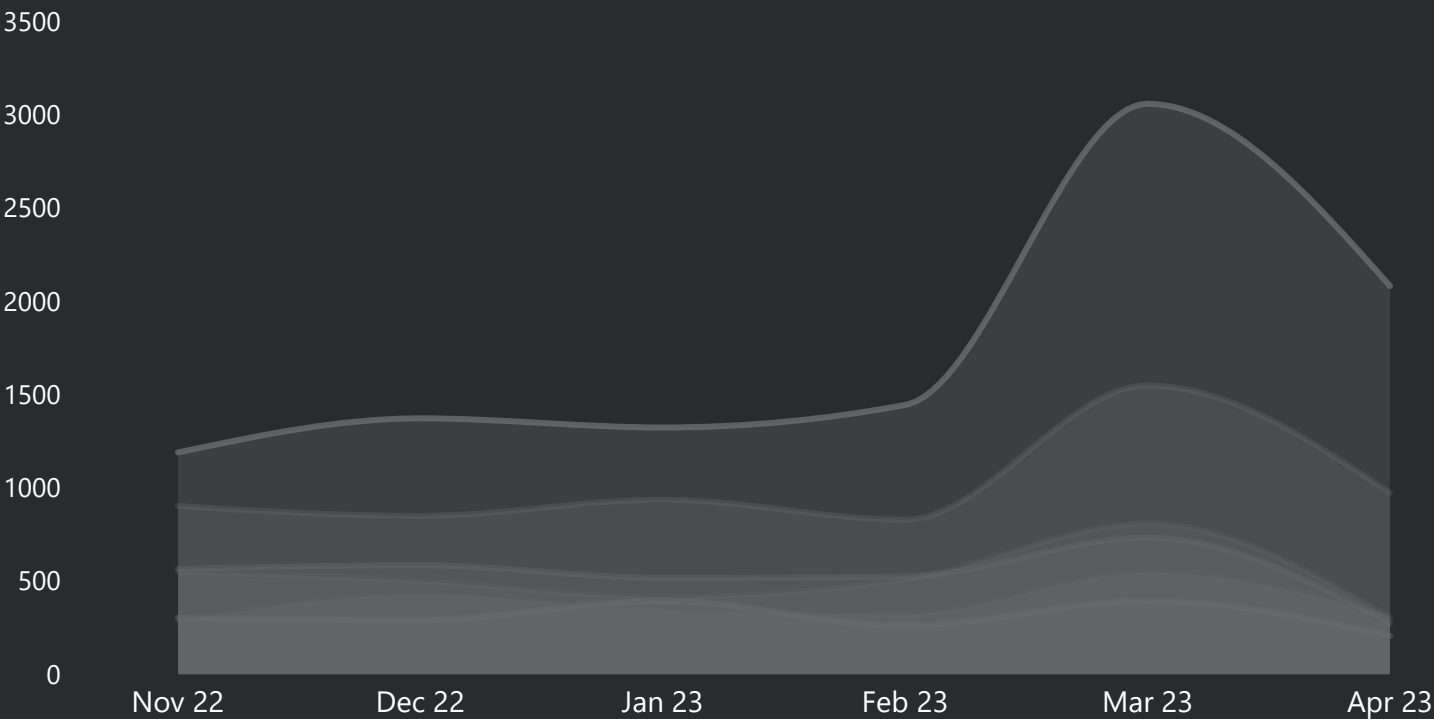
599M

Average: 3 M

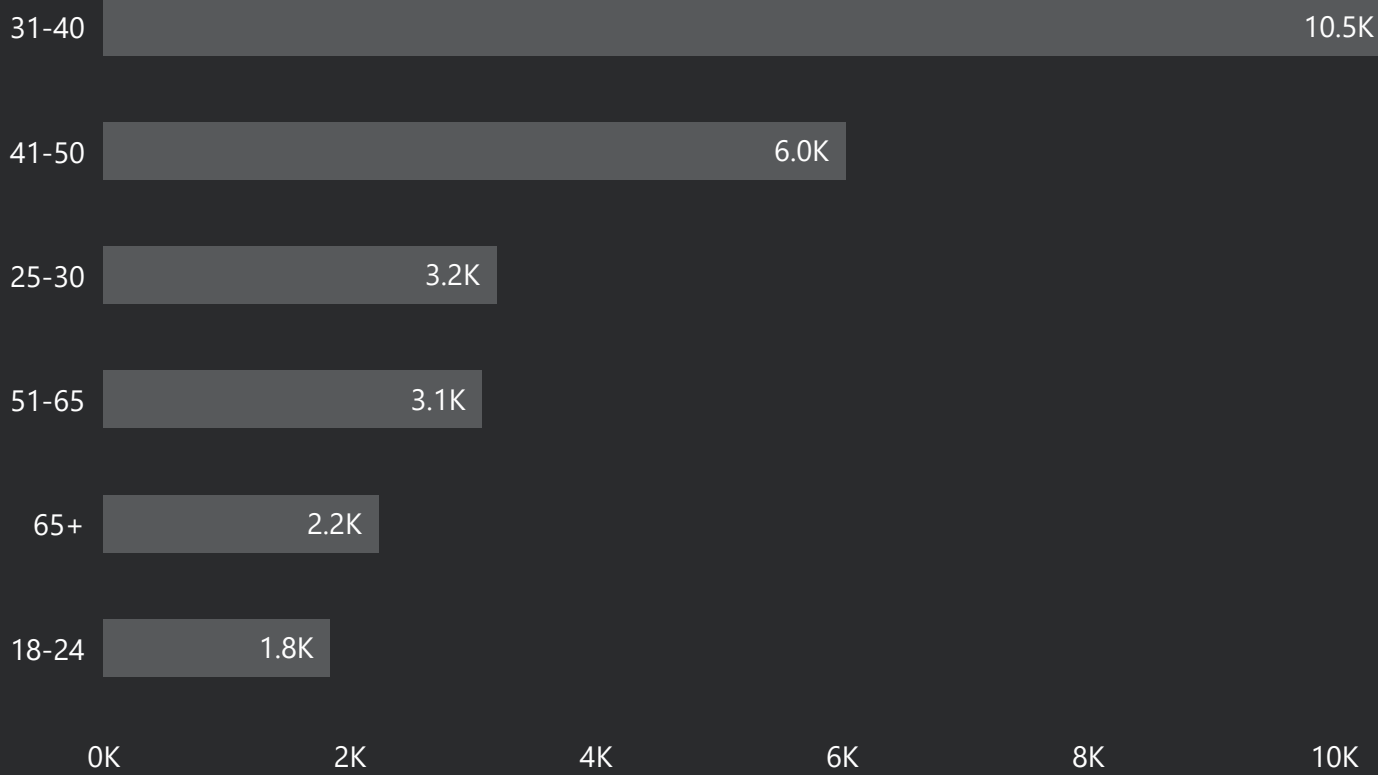
Age Group vs Policy Preference

Policy ID	18-24	25-30	31-40	41-50	51-65	65+
POL1048HEL	30	102	594	366	259	317
POL2005HEL	32	81	499	373	365	618
POL3309HEL	231	441	1836	858	318	145
POL4321HEL	847	1152	1526	561	235	113
POL4331HEL	379	630	1644	692	242	148
POL5319HEL	93	269	1414	949	425	179
POL6093HEL	74	185	966	724	369	225
POL6303HEL	94	224	1202	897	421	179
POL9221HEL	64	110	779	611	443	311

Customer Trend by Age Group



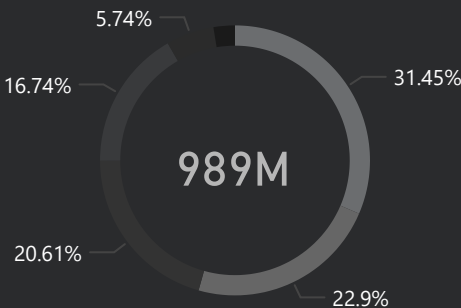
Customers by Age Group



Abbreviation

LM -> Last Month

Revenue by Age Group



Sales Mode by Age Group

