

# Strategic Stakeholder Intelligence ✨

Stakeholder Intelligence & Strategic  
Performance Dashboard **Using Tableau**

**Organization: HSBC**

PROJECT

商 务 | 工 作 | 总 结

Project Introduction Template



# ✦ Purpose

## C O N T E N T S

### 01.

To provide a strategic view of stakeholder data.

### 02.

Empower decision-makers with KPIs on premiums, equity, profitability & asset management.

### 03.

Highlight patterns in value creation and stakeholder performance.

# 01

## Project Overview

- **Interactive Tableau dashboard to monitor key metrics.**
- **Tracks insurer and stakeholder performance over time.**
- **Covers premium trends, equity value, tenure-based profitability, etc.**



# Project Context

**01**

**Financial services industry, focusing on insurer-stakeholder relationship**

**02**

**Need for centralized monitoring of performance, cost, and returns.**

**03**

**High data volume across years, roles, cities, and asset types.**



# Project Objectives

## description



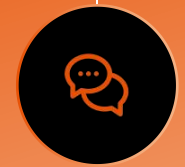
Visualize performance indicators for stakeholders and insurers.



Analyze profitability based on tenure and region.



Understand asset under management across roles.



Enable dynamic decision-making with interactivity and filters.

# Target Audience



**Business Analysts**



**Insurance Stakeholders**



**CXOs and Strategic Teams**



**Sales & Operations Teams**



**Data Analysts & MIS Teams**





# Business Problem Addressed

- Lack of centralized visibility into stakeholder value contribution.
- Limited tools for analyzing premium trends across multiple variables.
- Difficulty in comparing insurer performance & equity distribution.
- Need for dynamic filtering and exportable insights.



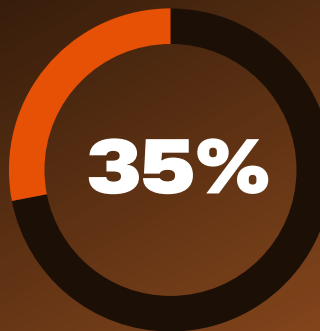
Presentations



Presentations are  
communication tools

# Key Features & Visuals

- Year-wise premium collection bar chart.
- Profitability breakdown by city & tenure.
- Shareholding distribution donut chart.
- Value created by insurers visualized in bar chart.
- Assets under management bar graph by stakeholder type.

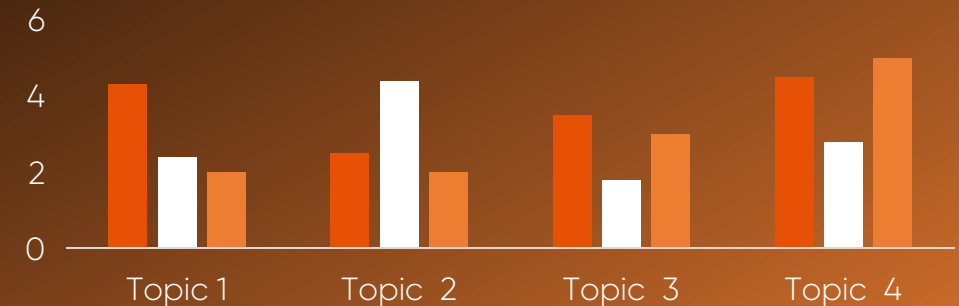




# Key Performance Indicators (KPIs)

- Highest Value by Insurer: 49.17M
- Average Age of Stakeholder: 34.45

- Total Premium Collected: 245.9B
- Equity Value Created: 230.82B



# Filters for Custom Insights

## Filter by:

- Premium
- Gender
- Assets under Management
- Stakeholder
- Profitability
- City
- Date Range



**100+**

**Allows deep-dive into  
specific segments of data.**

**300.0+**

# Interactivity Highlights



● Clickable charts to auto-filter others.



● Tooltips show detailed values and percentages on hover.



● Real-time dynamic updates of KPIs based on selection.



# Export Options ✨

C O N T E N T S

**01.**

**PDF export  
button for  
snapshot  
sharing.**

**02.**

**Includes:**

- **KPIs**
- **Filters**
- **All charts**

**03.**

**Watermarked  
with company  
branding.**



# User Access Controls



**Role-based access  
ensures data security.**



**Analysts → Summary  
view**



**Executives → Full view**



**Field Staff → Limited  
city-wise view**



**Promotes relevant access  
without compromising  
integrity.**



**40.0+**

**Project  
Introduction**

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**6400+**



# Usage Instructions

- Use filters on the left to refine city, tenure, gender, and date.
- Click on chart elements to filter others dynamically.
- Hover over any chart element for detailed data insights.



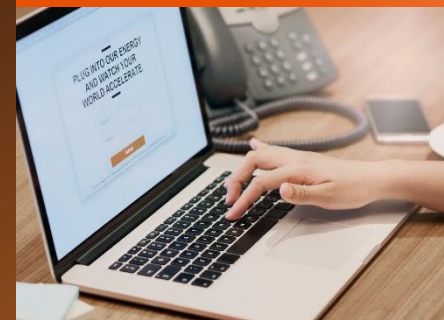
Presentations



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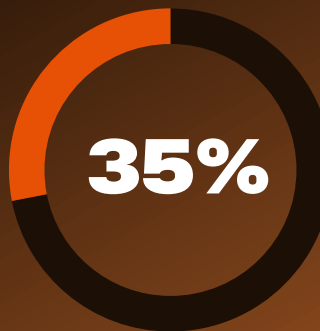
# Project Lifecycle & Technical Workflow

- **Data Preparation** → Aggregated from business systems.
- **Data Modeling** → Cleaned & structured in Tableau.
- **Dashboard Design** → KPIs + visual charts + filters added.
- **Deployment** → User-tested and published for access.



# Key Business Takeaways

- Ahmedabad and Jamshedpur show high profitability in long tenures.
- Maximum equity value created via Bancassurance partnerships (139.91B).
- Stakeholder type “People” manages the most assets (5,024).
- Equity has the largest share in shareholder distribution (38.39%).
- Highest premium collection observed between 2014–2019.





# Tools & Technologies Used

# 10%



- Tableau – Visualization and dashboard design
- Excel/CSV – For initial data preprocessing
- PDF Export Tools – For reporting and sharing
- Role-Based Access Controls – For managing user visibility

**Project  
Introduction**

Presentations

# Stakeholder Demographics & Insights

- **Average stakeholder age: 34.45 years**
- **Data segmentation by gender and stakeholder type**
- **Most stakeholders fall under "People" → highest asset count**
- **Demographic filters allow fine-tuned marketing and policy planning**





# Premium Collection Trend Analysis

- Data from 2014 to 2024 shows growth, dip, and recovery
- Peak years: 2017–2019 → strong premium performance
- 2020–2021 dip may indicate pandemic effect or policy changes
- Supports strategic adjustments in product offerings and targeting



# Strategic Recommendations



- **Focus on long-tenure cities like Jamshedpur and Ahmedabad for retention**
- **Analyze low-performing cities & segments for potential support**
- **Expand Bancassurance partnerships due to high value created**
- **Use demographic segmentation to tailor product delivery**

# Conclusion

**01**

● **The dashboard bridges data silos and offers clear, actionable insights.**

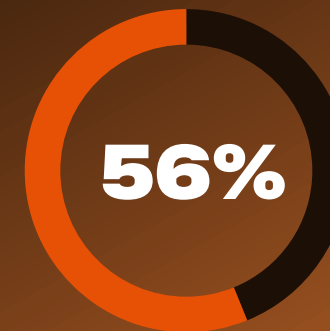
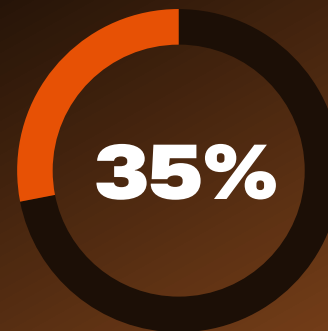
**6.30+****02**

● **Enables KPI tracking for better strategic alignment.**

**8.30+**

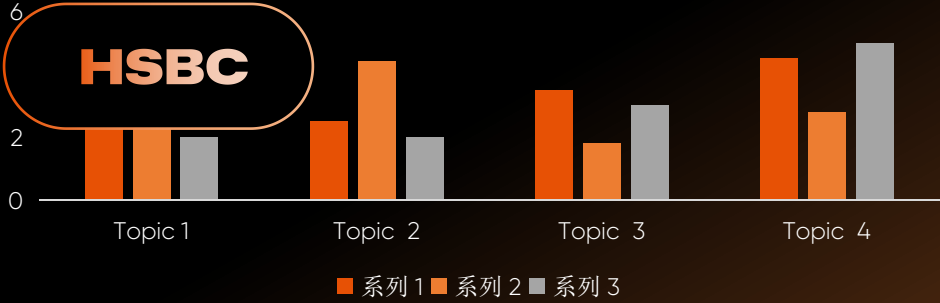
# Future Scope

- **Integrate live data from business systems.**
- **Add predictive analytics using Tableau extensions.**
- **Incorporate mobile-responsive dashboard view.**



Presentations

# Final Dashboard



## Stakeholder Intelligence & Strategic Performance

Highest Value Created by Insurer

49.17M

Average Age of Stakeholder

34.45

Equity Value Created

230.82B

Total Premium

245.9B

Filter

Premium

(All)

Gender

(All)

Assets und..

(All)

Stakeholder

(All)

Profitability

(All)

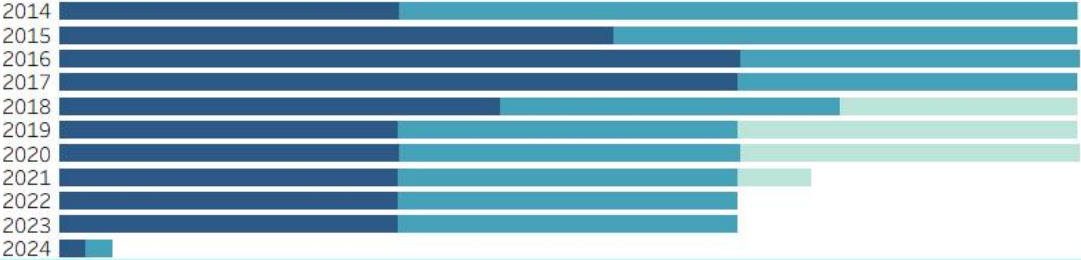
Date

(All)

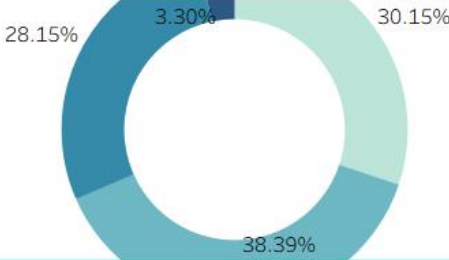
City

(All)

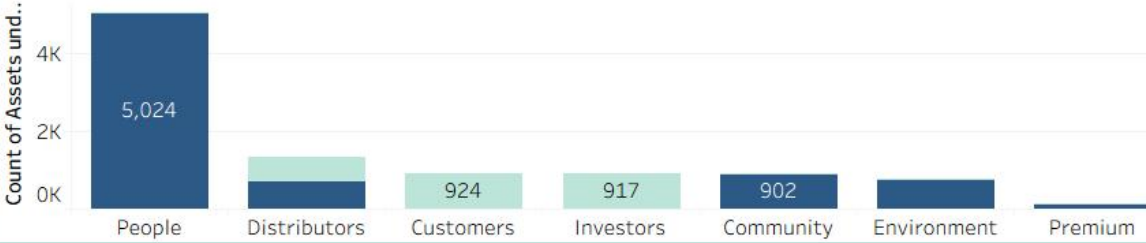
Premium Collection Overtime



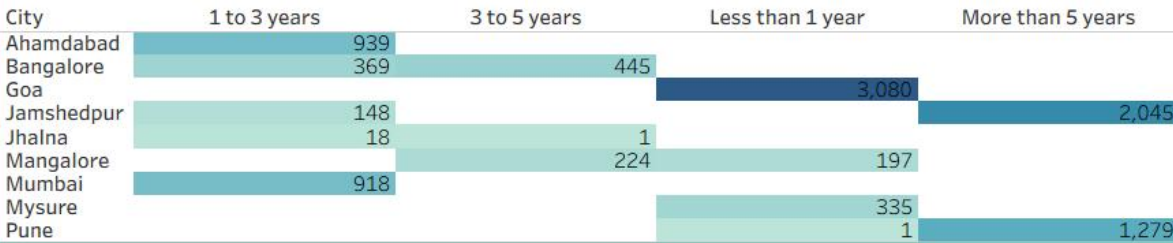
Shareholding Distribution



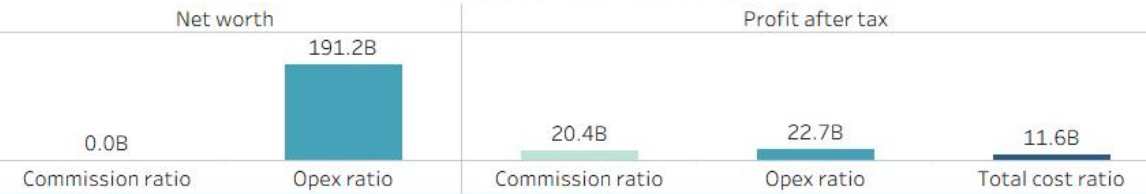
Assets Under Management by Stakeholder



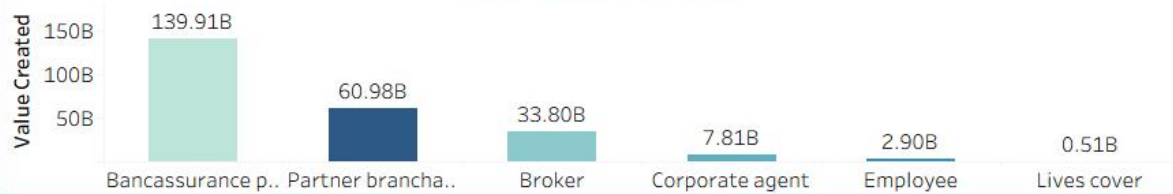
Prfitability by City & Tenure



Cost Ratio v/s Profitability



Value Created by Insurers





# Project Overview

HSBC



Strategic Stakeholder Intelligence



Strategic Stakeholder Intelligence



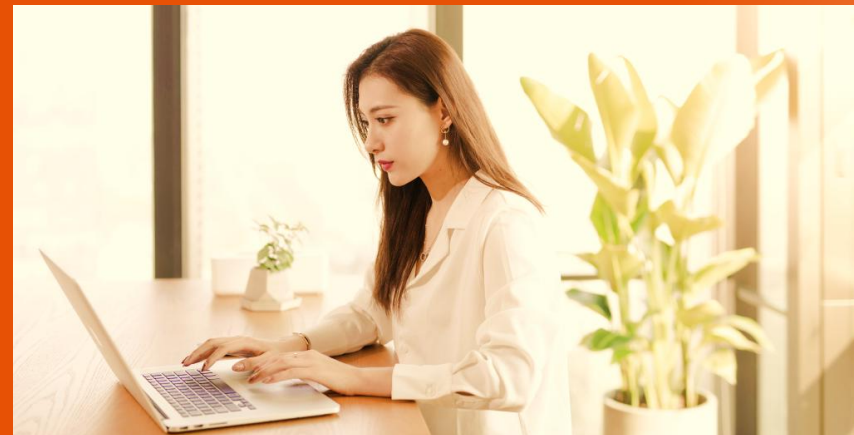
## Project

# Thank you!

"Thank you for your time,  
attention, and engagement."

35%

PROJECT



56%

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Presentations are communication  
tools.