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PRESENTATION

# Strategic Stakeholder Intelligence ✦

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

**Organization: HSBC**

PROJECT

商 务 | 工 作 | 总 结

Project Introduction Template

# Purpose

CONTENTS

## 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.

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# 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.

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# 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.

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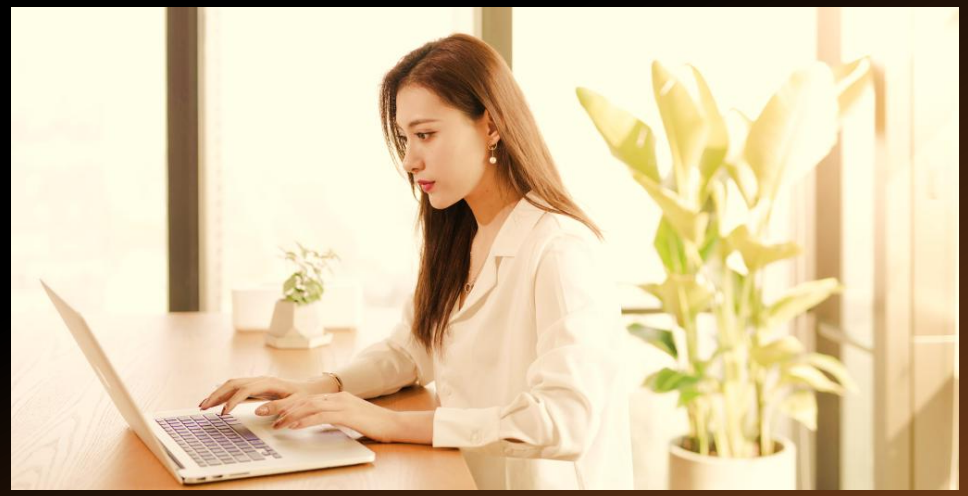
# Key Features & Visuals

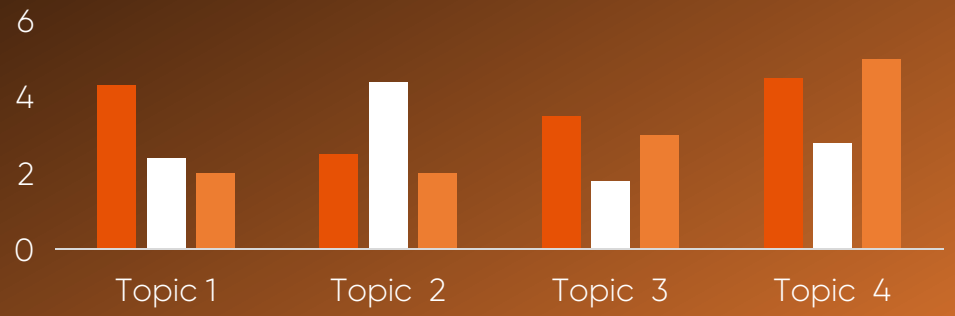
- Year-wise premium collection bar chart.
- Shareholding distribution donut chart.
- Assets under management bar graph by stakeholder type.
- Profitability breakdown by city & tenure.
- Value created by insurers visualized in bar chart.



LOAN

# 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



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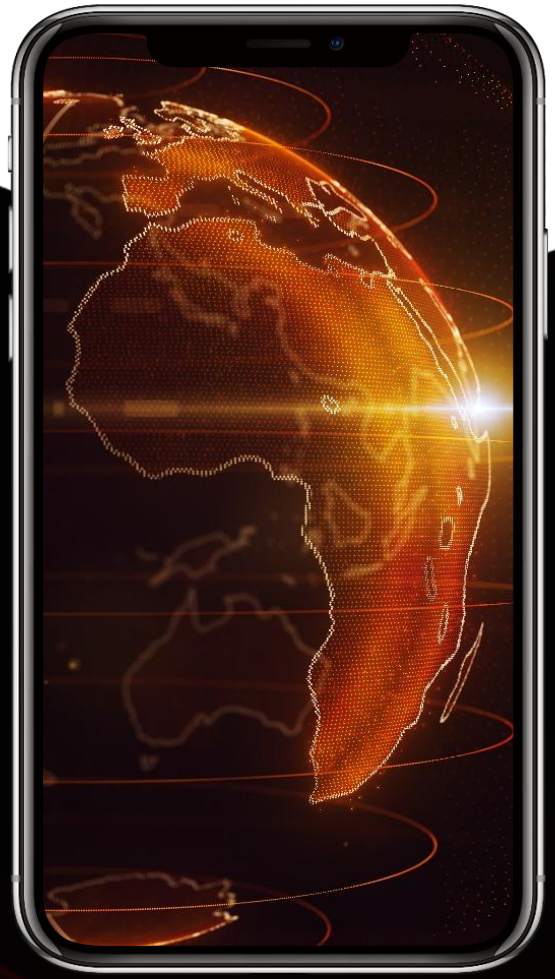
# Filters for Custom Insights

**Filter by:**

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



**100+**

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

**300.0+**

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# 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.

BUSINESS

# Export Options

CONTENTS

## 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

6400+

CHEQUE

# 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.

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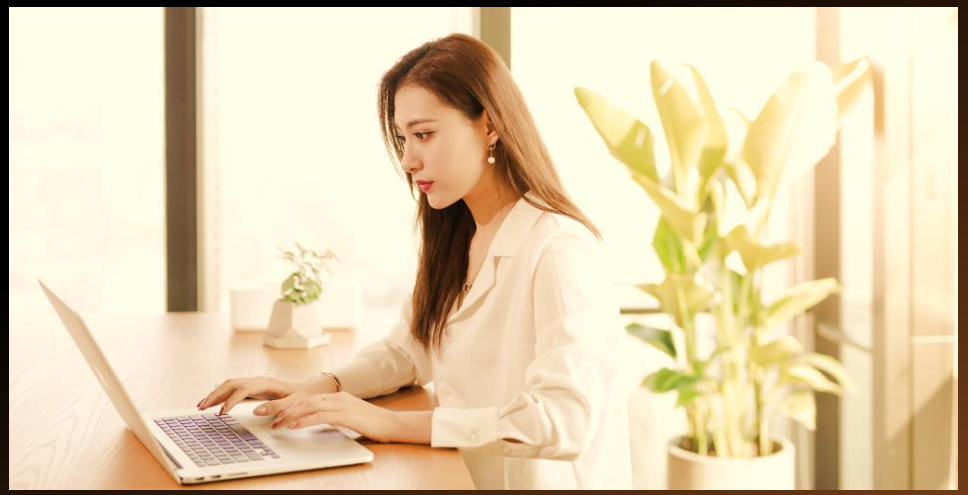
# Project Lifecycle & Technical Workflow

- 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).
- Highest premium collection observed between 2014–2019.
- Stakeholder type “People” manages the most assets (5,024).
- Equity has the largest share in shareholder distribution (38.39%).



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# 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**

DATA DESIGN

# 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

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# 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

TREND ANALYSIS

# 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+

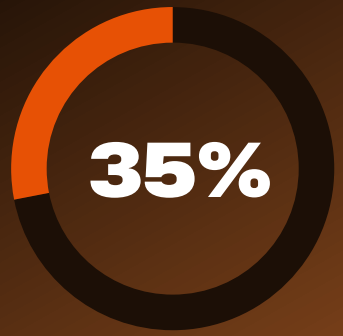
## 02

- 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.



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# Project Overview

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Project

# Thank you!

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

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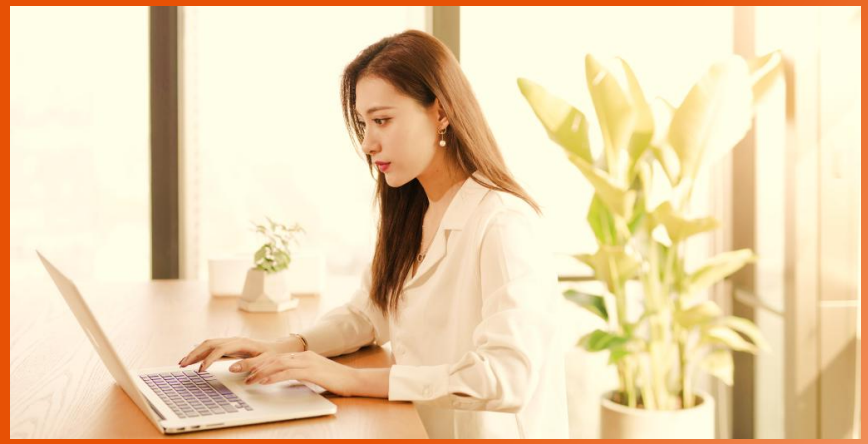

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