

# **SHIELD INSURANCE ANALYSIS**

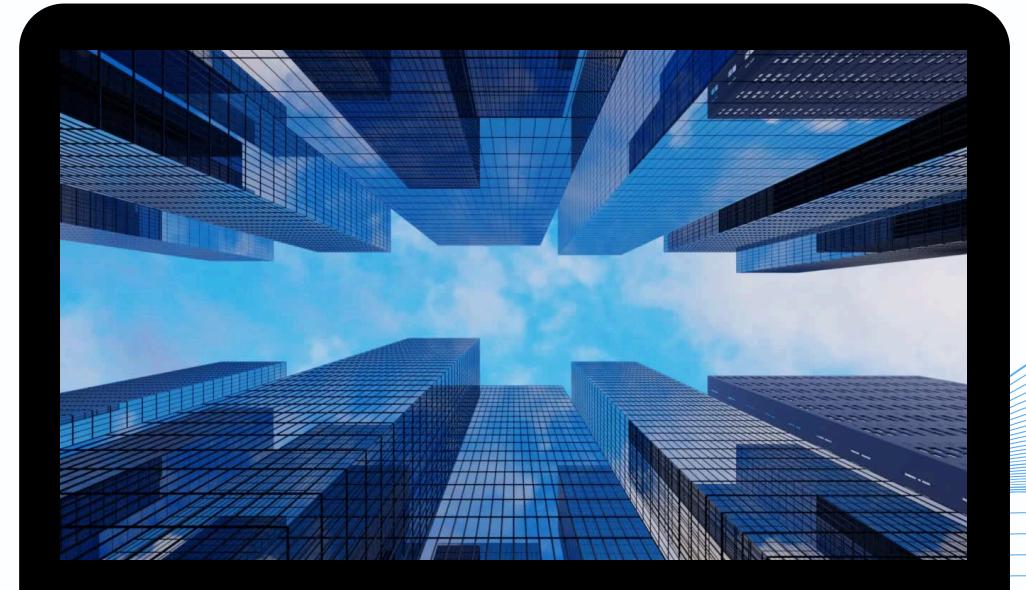


Presented by:

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# ABOUT THE COMPANY

- Shield Insurance is a leading insurance provider dedicated to offering a wide range of policies tailored to meet the diverse needs of our customers.
- With a strong presence in five major Indian cities— Chennai, Delhi, Indore, Hyderabad, and Mumbai.
- Shield Insurance ensures that individuals and families across these urban centers have access to reliable and comprehensive insurance coverage

# MOCKUP

**GENERAL VIEW**

**KEY METRICS**

3.25M LM: □(%chg)	6258 LM: □(%chg)	108k LM: □(%chg)	208 LM: □(%chg)
Total Revenue	Total Customers	Daily Revenue Growth	Daily Customers Growth

**REVENUE SPLIT**

City	Total Customers	Total Revenue

**CUSTOMERS SPLIT**

Age Group	Total Customers	Total Revenue

LM: Last Month      %chg: Percentage change with LM

**FILTERS**

Trend by Months

Revenue Customers

M1 M2 M3 M4 M5 M6

**CUSTOMERS SEGMENTATION**

City	Age Group	Total Revenue	Total Customers

**Sales Mode Analysis**

**FILTERS**

TREND SALES MODE OVER MONTH

M1 M2 M3 M4 M5 M6

**Age Group Analysis**

**FILTERS**

TREND CHART BY AGE GROUPS

Legend: Age Group

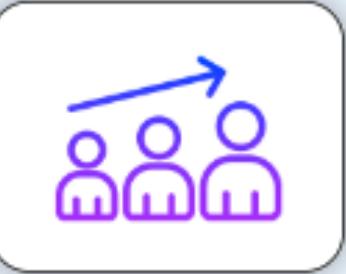
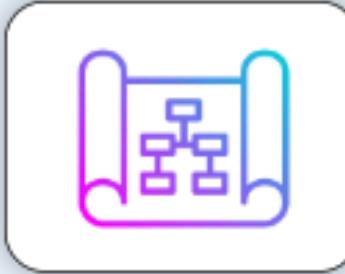
No of Customers Months

Age Group No of Customers

# HOME / LANDING PAGE



## Shield Insurance Analysis



**Overview**

The **Shield Insurance Report**, provides a general view with monthly and daily trends by revenue, KPI and daily trends by customer and city

**Sales Mode**

The **sales mode view** provides insights into revenue and customer trends with monthly breakdowns by customer and Revenue.

**Age Group**

The **Age Group view** provides insights into revenue and customer trends with Age breakdowns by customer and Revenue.



Atliq Technology Internship  
- by Ritwick Mukherjee

# KEY PERFORMANCE INDICATOR



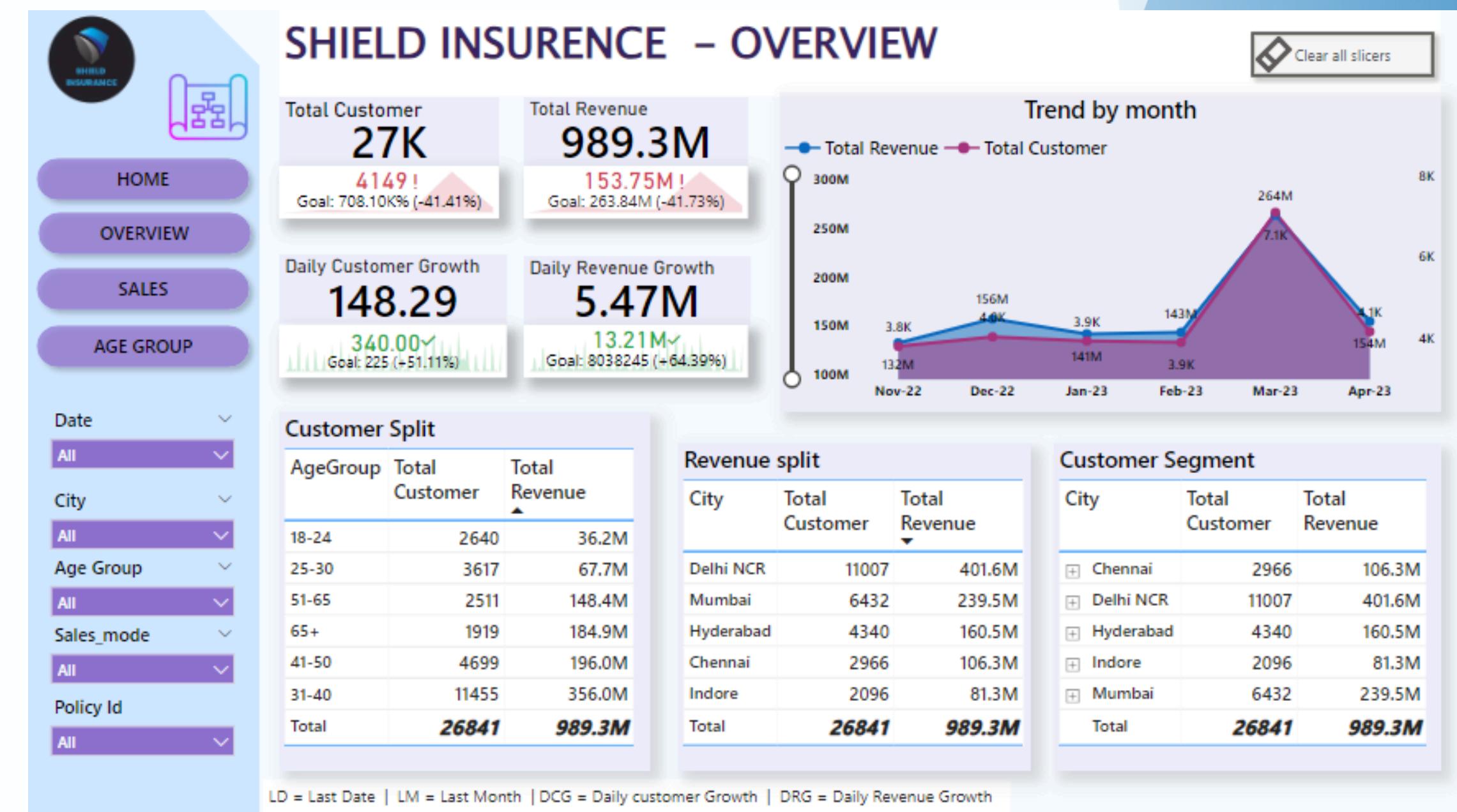
There are 4 key metrics for Shield Insurance: Total Customers, Total Revenue, Daily Customer Growth (DCG), and Daily Revenue Growth (DRG).

- **Total Customers** represent the total number of users of the company, which is around **27K**.
- **Total Revenue** is the revenue generated from all policy registrations, amounting to approximately **989M** over **6 months**.
- **Daily Customer Growth** is the average daily increase in the customer base during a specific month, with an average of **148.29** over the past **6 months**.
- **Daily Revenue Growth** is calculated by dividing the total revenue earned in a specific month by the number of unique dates within that month, with a **DRG** value of **5.47M**.
- We can also find the previous month values and the percentage change between the previous and selected month

# OVERVIEW ANALYSIS

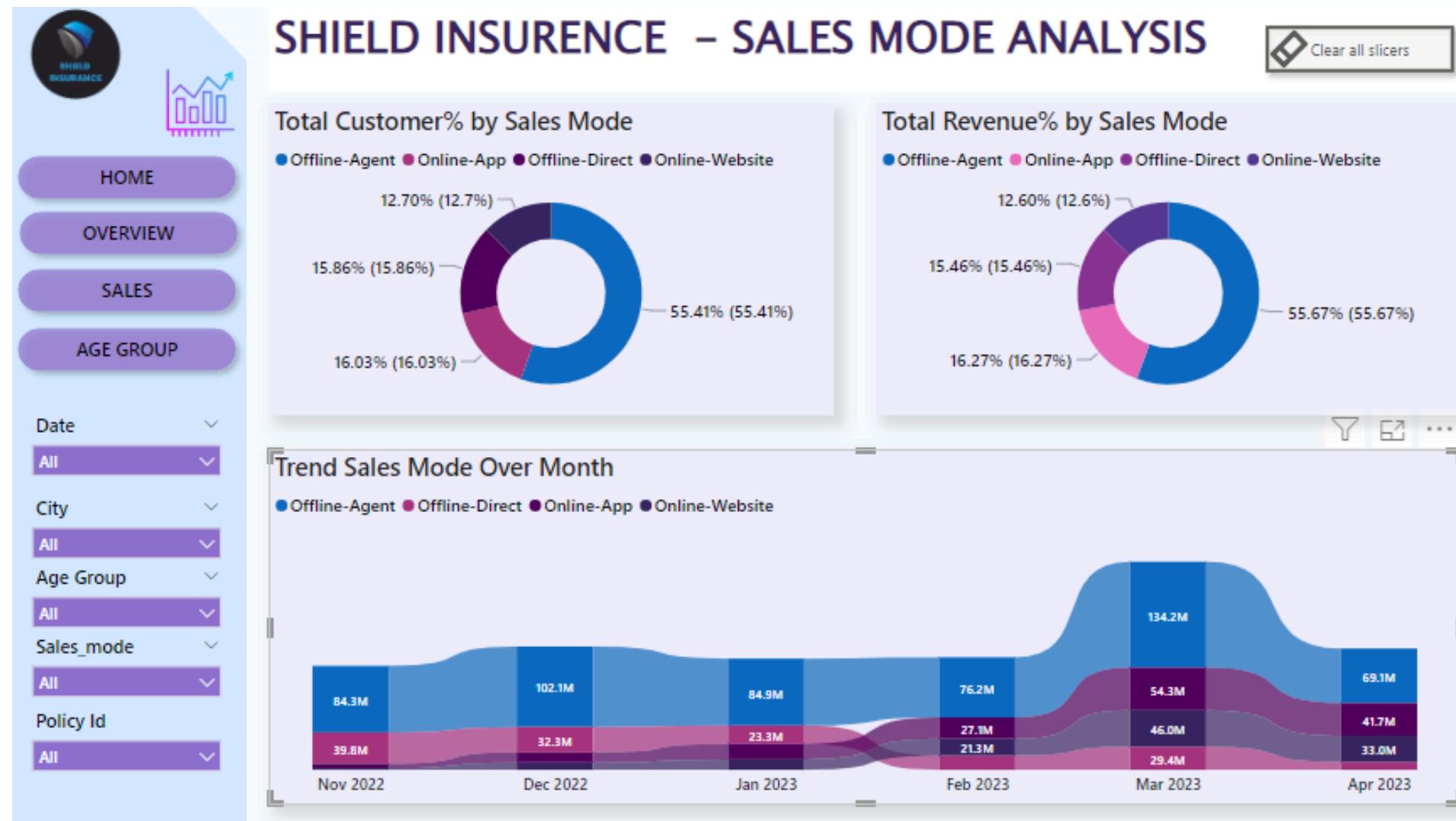
Dive into a bird's-eye perspective of Shield's performance, with key metrics and trends elegantly displayed for quick analysis. From overall revenue trends to customer acquisition metrics, this page serves as the compass guiding strategic decision-making.

- The majority of customers are aged between **31 and 40** and are located in the **Delhi NCR area**. In contrast, the fewest customers are over **65 Indore**.
- In terms of monthly performance, **March 2023** saw the highest number of customers, with **7.1K**, and generated a revenue of around **264M**. Conversely, **November 2022** recorded the lowest number of customers at **3.8K** and the lowest revenue of **132M**.
- Among the policies, **POL2005HEL** generated the highest revenue, approximately **324M**, whereas **POL4321HEL** generated the lowest revenue, around **25M**.



# SALES MODE ANALYSIS

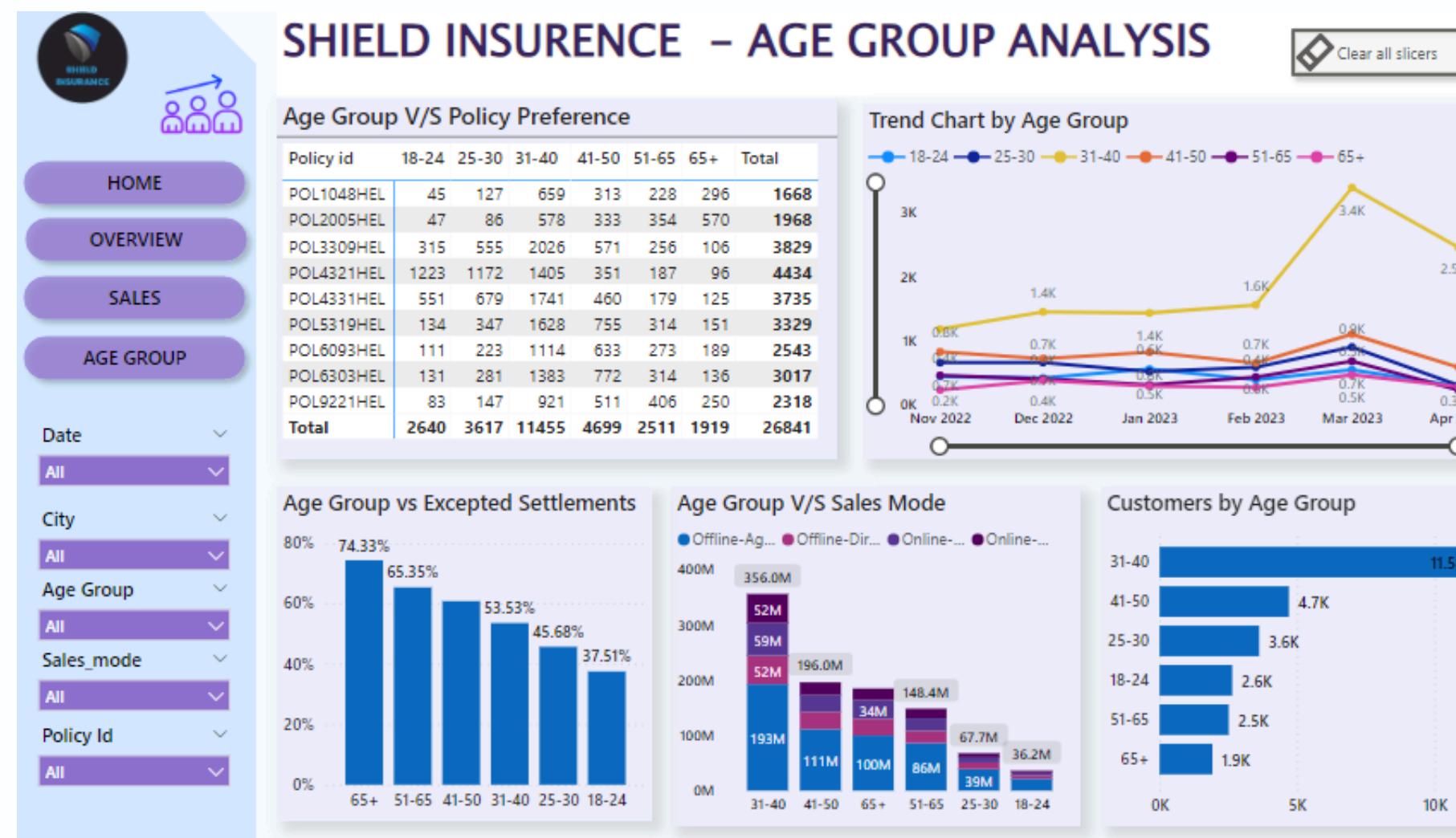
Delve deep into the intricacies of sales performance with a dedicated page that dissects sales data based on different modes. Whether it's analyzing the effectiveness of online channels versus traditional avenues or pinpointing the most lucrative sales modes, this page equips the team with insights to optimize sales strategies.



- 55% of the customers are registered and 551M in revenue is generated by **offline agents**, and 16% by and 161M **offline-direct** and **online app** each.
- From **November 2022 to April 2023**, **Offline Agent** was the top sales mode. The highest registered customer policy is **POL4321HEL**. **Offline agents** consistently led revenue generation, with **POL2005HEL** generating the most revenue (**324M**) and **POL4321HEL** the least (**25M**). The second-highest revenue sources shifted from **offline direct** to the **online app**.
- Across all cities, **offline agents** have generated the highest revenue and registration. Among the cities, **Delhi NCR** has the highest registration and revenue at **402M**, whereas **Indore** has the lowest revenue at **81M**.

# AGE GROUP ANALYSIS

Unveil the power of demographics with a granular exploration of customer age groups. By understanding the preferences and behaviors of different age cohorts, Shield can tailor its offerings and marketing efforts to resonate more deeply with its diverse customer base.



- **11,209** of the customers are aged around **31- 40**, while **1,990** of the customers are aged above **65**.
- The expected settlement rate for customers above **65** is around **74.33%**, and for those aged **50-65**, it is **65.35%**. The lowest expected settlement rate is for the age group **18-24**, which is **37.51%**.
- **POL4321HEL** is favored by ages **18-30** and less by **50+**. **POL2005HEL** is preferred by **50+** and less by **18-30**, generating **110M** from those over **65**. **POL4321HEL**, **POL3309HEL**, and **POL4331HEL** earn little from **65+**.
- **Offline agents** attracting highest customer **across all age groups**

# RECOMENDATION

- **Innovative Policies:** Introduce new policy types like cyber insurance, pet insurance, and wellness programs.
- **Customization:** Allow policy customization with various coverage options and add-ons.
- **Expand Agent Network:** Recruit more agents in underserved areas to increase reach.
- **Referral Programs:** Offer incentives like discounts or rewards for customer referrals.
- **Targeted Campaigns:** Run marketing campaigns based on demographics, geography, and behavior.
- **Flexible Payment Plans:** Offer flexible payment options like monthly installments

# THANK YOU !!

