POWER BI DASHBOARD

KEY INSIGHTS

GENERAL VIEW

TREND ANALYSIS

MONTHLY REVENUE TREND
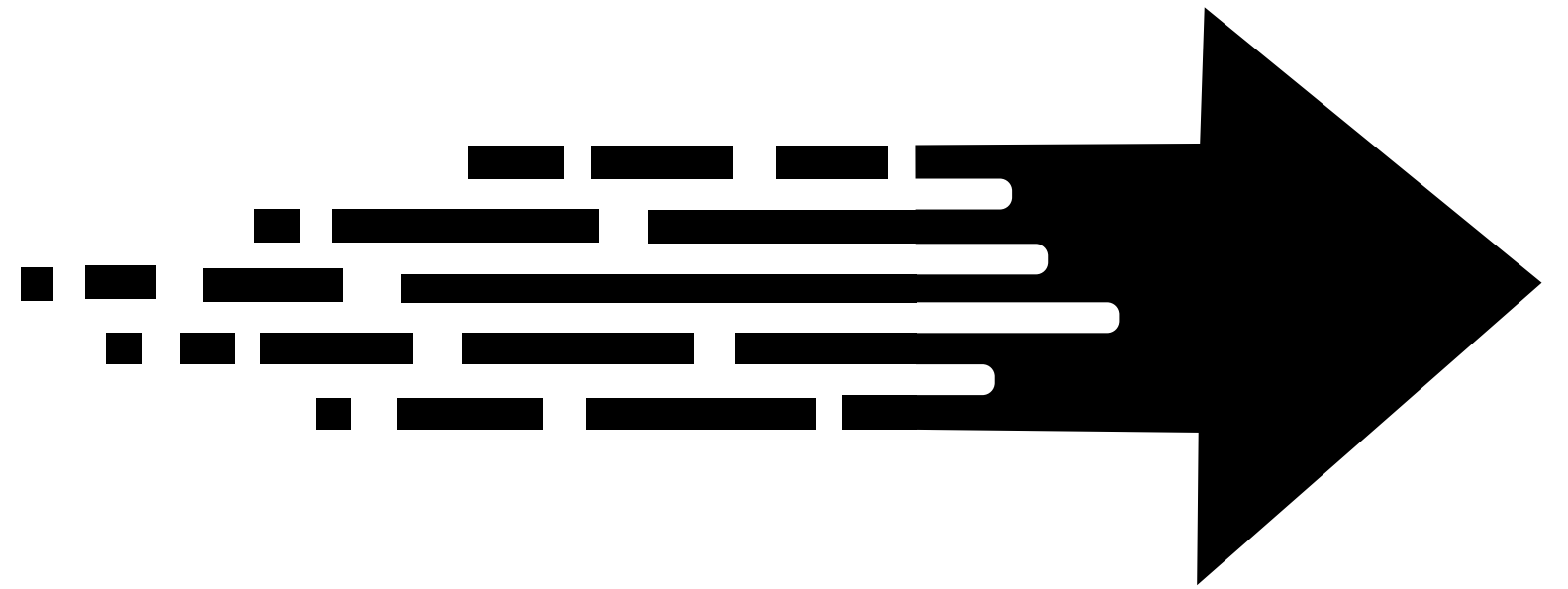
- **March 2023** was a transformative period for Shield Insurance, witnessing a notable upswing in crucial business metrics that reshaped the company's trajectory.
- Concurrently, there was a significant spike in overall revenue, reaching an impressive **$264 million**.

Monthly revenue trend chart:
- Nov 2022: 132M
- Dec 2022: 156M
- Jan 2023: 141M
- Feb 2023: 143M
- Mar 2023: 264M
- Apr 2023: 154M
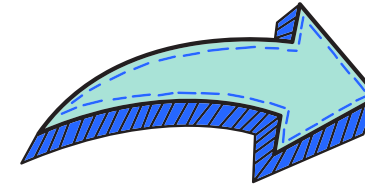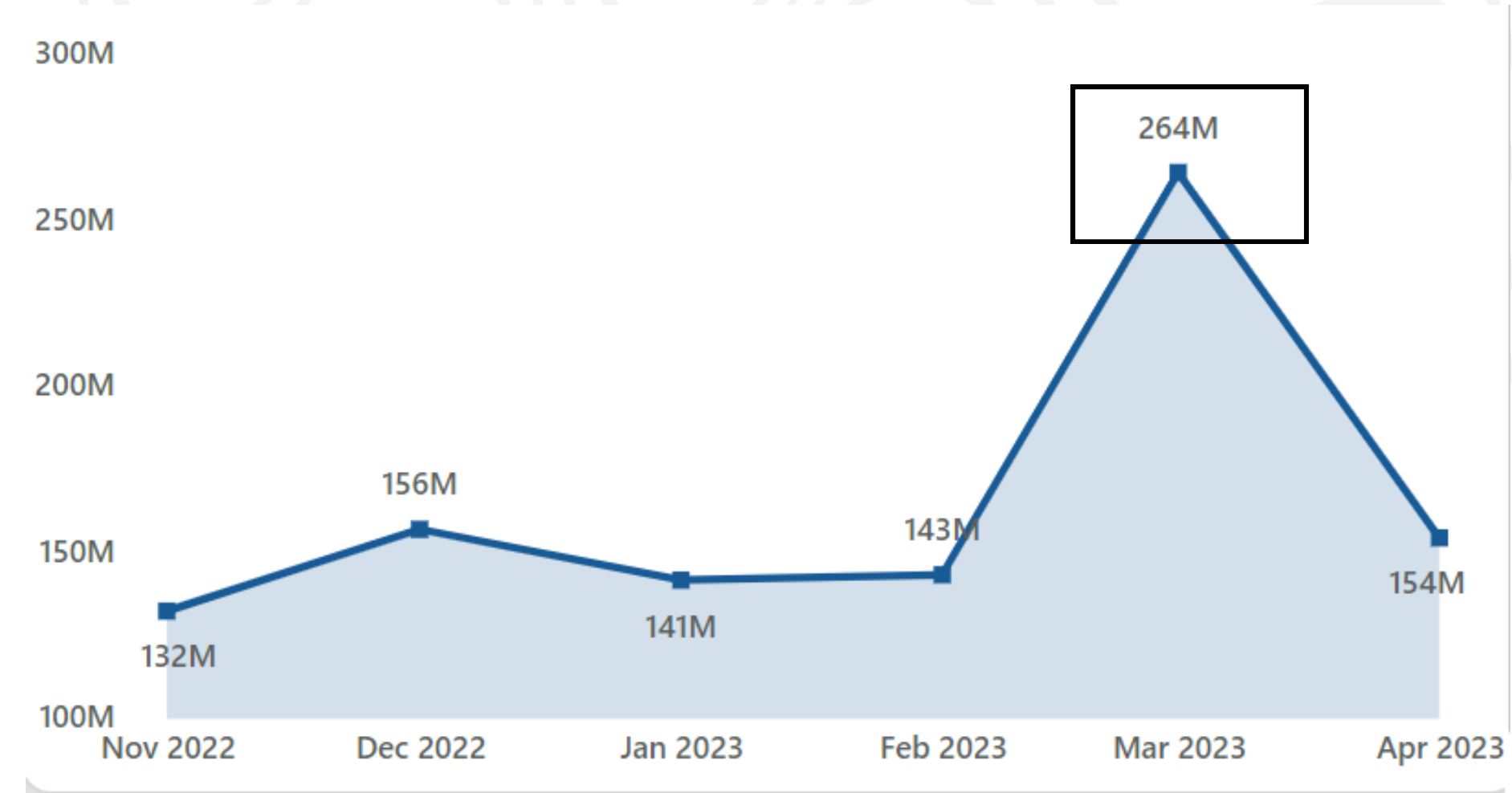
MONTHLY CUSTOMER TREND

Monthly customer trend chart:
- Nov 2022: 3.8K
- Dec 2022: 4.0K
- Jan 2023: 3.9K
- Feb 2023: 3.9K
- Mar 2023: 7.1K
- Apr 2023: 4.1K

- The total customer count surged to an impressive **7.1 thousand**, representing a substantial increase compared to both the preceding and subsequent months.

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CUSTOMER SEGMENTATION INSIGHTS

- **Delhi NCR** leads with **11K** customers and a revenue of **402M**, showcasing a robust market presence.
- **Mumbai** follows with **6.4K** customers and a significant revenue contribution of **240M**, highlighting a potentially profitable market.

AGE GROUP HIGHLIGHTS

- Majority of policy enthusiasts fall within the **31-40 age group**, contributing **356M** in revenue.
- The **41-50 age group** closely follows, contributing to a diverse and robust revenue distribution.
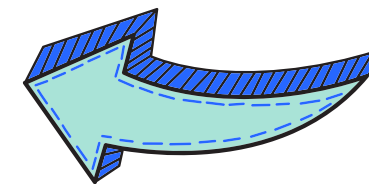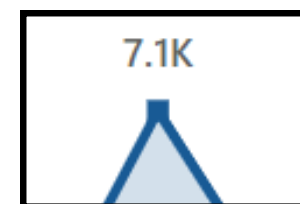- **Note:** The **18-24 age group** represents the l**owest contributors to revenue**, possibly due to lower purchasing power or different insurance needs.

CUSTOMER SEGMENTATION

City	Total Revenue	Total Customer
Delhi NCR		
31-40	146M	4741
41-50	78M	1899
25-30	27M	1474
18-24	15M	1062
51-65	60M	1030
65+	75M	801
Mumbai	**240M**	**6432**
Hyderabad	**161M**	**4340**
Chennai	**106M**	**2966**

AGE GROUP WISE SPLIT

Age Group	Total Revenue	Total Customer
31-40	356M	11455
41-50	196M	4699
65+	185M	1919
51-65	148M	2511
25-30	68M	3617
18-24	36M	2640

POLICY-WISE REVENUE GENERATION HIGHLIGHTS

- Policy **"POL2005HEL"** commands the spotlight with a Base Premium of **120,000 INR**, generating a staggering **324M** in Total Revenue.
- Policy **"POL1048HEL"** follows closely, with a Base Premium of **76,500 INR**, contributing substantially to the bottom line with a Total Revenue of **168M**.

POLICY WISE REVENUE

policy_id	Base Premium (INR)	Total Revenue ▼
POL2005HEL	120000	324M
POL1048HEL	76500	168M
POL9221HEL	42500	128M
POL6093HEL	31700	103M
POL6303HEL	21500	82M
POL5319HEL	16700	70M
POL3309HEL	12000	56M
POL4331HEL	7500	34M
POL4321HEL	5000	25M

SALES MODE ANALYSIS

SALES MODE ANALYSIS

Offline agents lead the way with **15k** customers, constituting **55%** of the total, and a substantial revenue contribution of **551M**, highlighting their dominance in both customer acquisition and revenue generation.

TOTAL REVENUE SPLIT PERCENTAGE BY SALES MODE

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

125M (12.6%)
153M (15.5%)
551M (55.7%)
161M (16.3%)
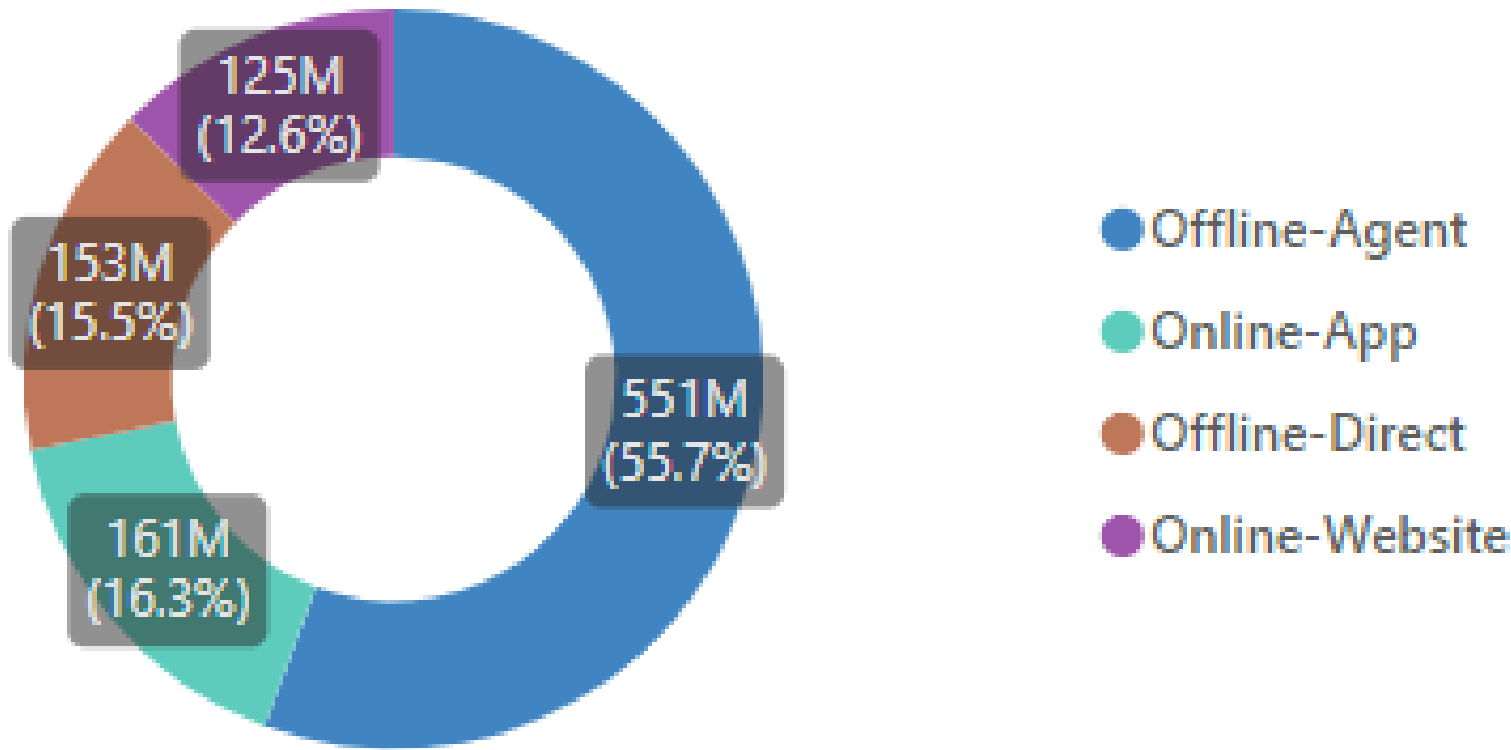
TOTAL CUSTOMER SPLIT PERCENTAGE BY SALES MODE

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

3K (12.7%)
4K (15.9%)
15K (55.4%)
4K (16.0%)
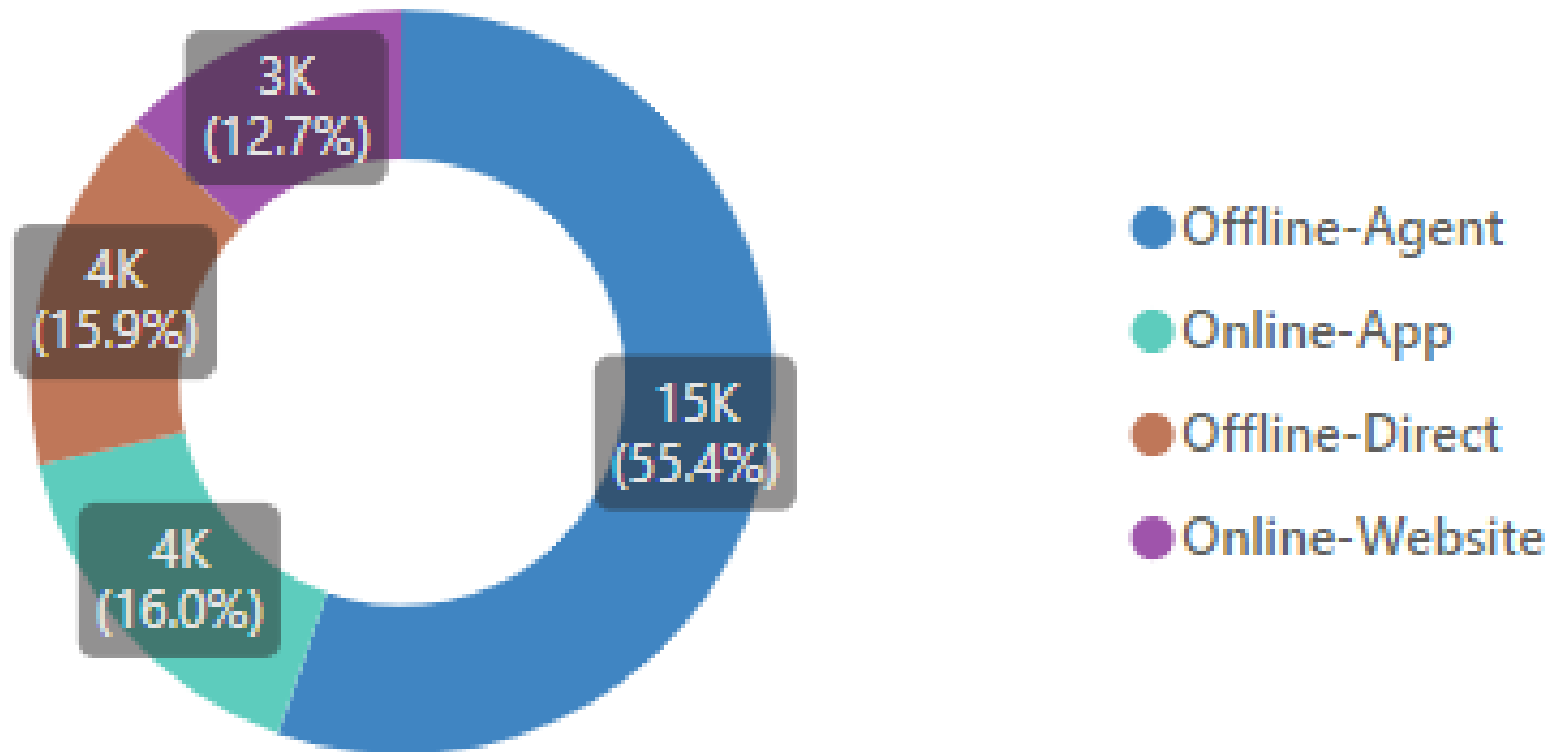
SALES MODE TREND ANALYSIS

- **Offline direct** sales mode witnesses a website in both customer numbers and revenue, signaling a shift in customer preferences.
- Conversely, the **online app** and **website** sales modes experience a slight uptick in both customer acquisition and revenue during the analyzed period, showcasing a **positive growth** trajectory.

SALES MODE CUSTOMER TREND OVER MONTH
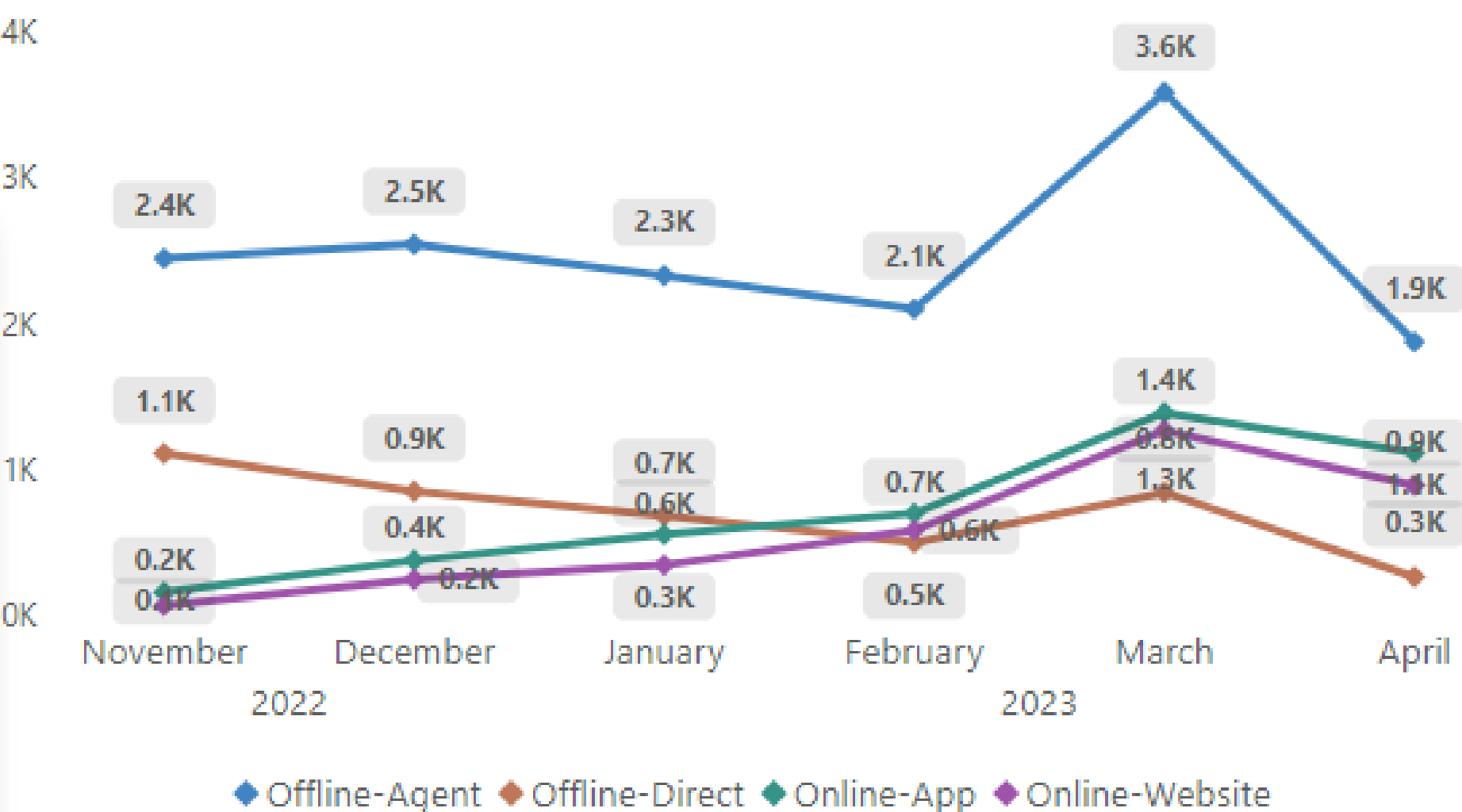
SALES MODE REVENUE TREND OVER MONTH
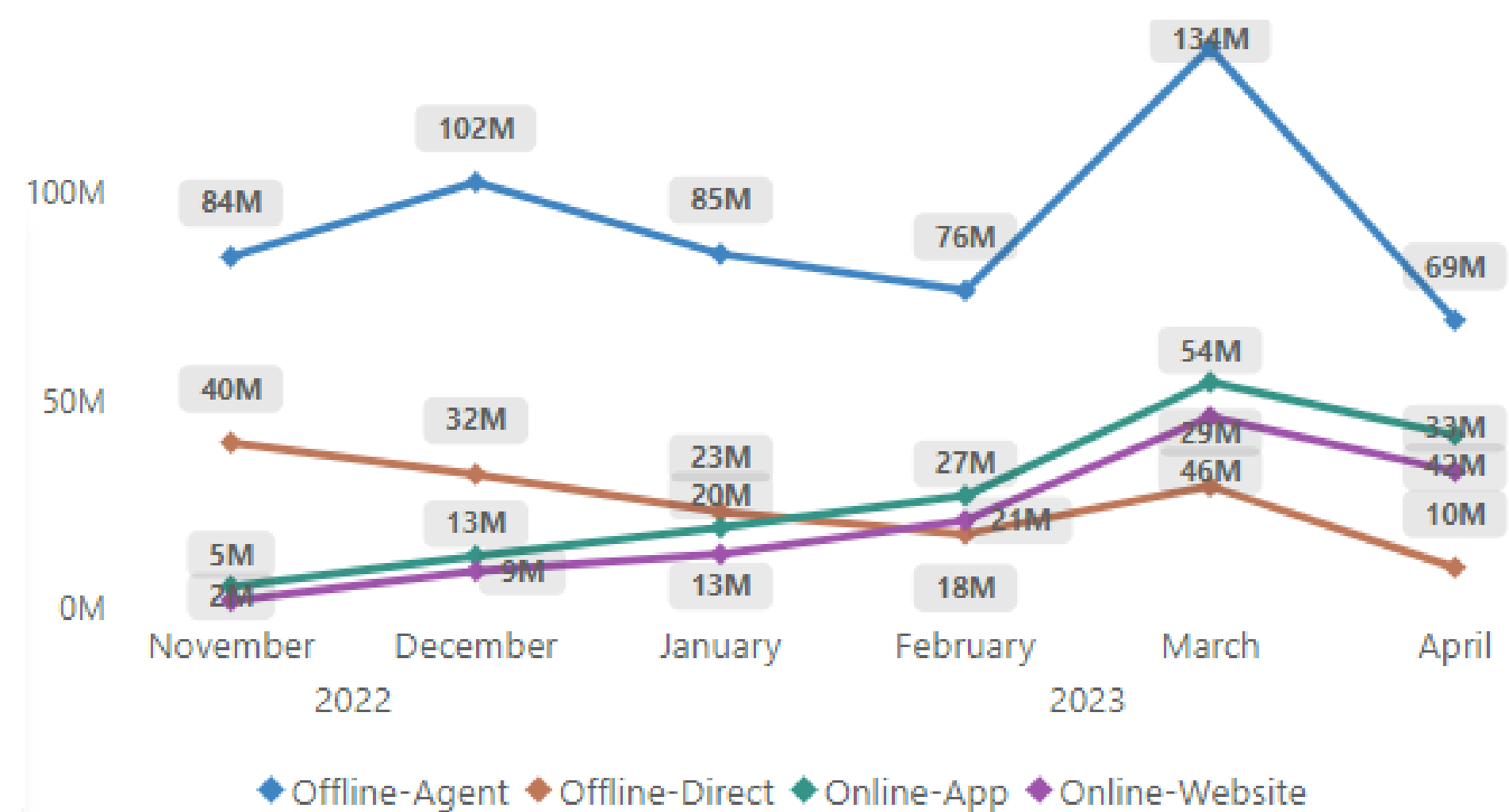
AGE GROUP ANALYSIS

AGE-BASED PATTERNS

The **31-40 age group** emerges as the most consistent customer base across all insurance plans, reflecting a substantial market presence and engagement.

TOTAL CUSTOMER BY AGE GROUP

age_group	Total Customer
31-40	**11455**
POL3309HEL	2026
POL4331HEL	1741
POL5319HEL	1628
POL4321HEL	1405
POL6303HEL	1383

TOTAL CUSTOMER BY AGE GROUP

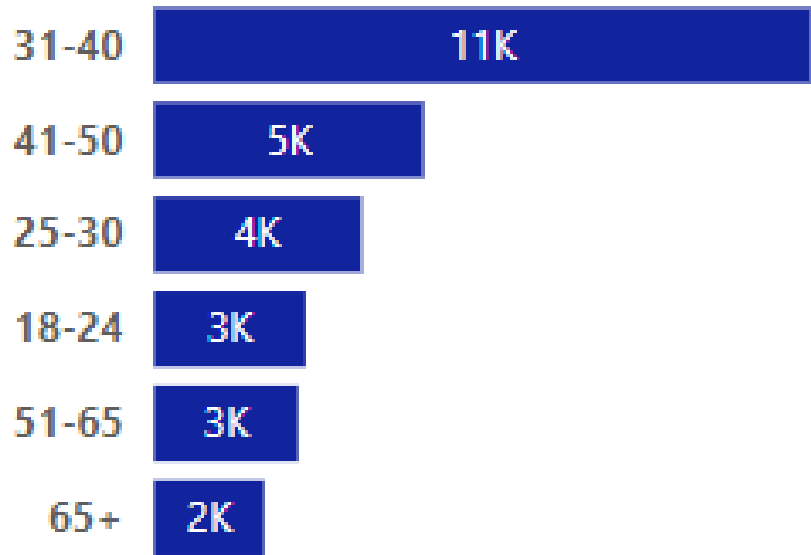| age_group	value
31-40	11K
41-50	5K
25-30	4K
18-24	3K
51-65	3K
65+	2K

POLICY PREFERENCE VS AGE GROUP

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL2005HEL	6M	11M	84M	53M	61M	109M	**324M**
POL1048HEL	4M	10M	61M	32M	25M	36M	**168M**
POL9221HEL	4M	7M	47M	29M	25M	17M	**128M**
POL6093HEL	4M	8M	42M	27M	12M	10M	**103M**
POL6303HEL	3M	7M	36M	22M	10M	5M	**82M**
POL5319HEL	2M	6M	33M	17M	8M	4M	**70M**
POL3309HEL	4M	7M	29M	9M	4M	2M	**56M**
POL4331HEL	4M	5M	16M	5M	2M	1M	**34M**
POL4321HEL	6M	6M	8M	2M	1M	1M	**25M**

Notably, '**POL3309HEL**' stands out as the most sought-after policy in this age demographic, revealing specific policy preferences within the broader age-based trends.

AGE GROUP PREFERENCE MODE

Within the **31-40 age group**, the '**Offline-Agent**' sales mode is the preferred choice for the majority of customers, underlining the significance of direct interactions.

SALES MODE VS AGE GROUP

Age Group	Offline-Agent	Offline-Direct	Online-App	Online-Website	Total
31-40	6164	1687	1954	1650	**11455**
41-50	2679	758	698	564	**4699**
25-30	2036	645	523	413	**3617**
18-24	1507	465	390	278	**2640**
51-65	1444	386	393	288	**2511**
65+	1043	315	344	217	**1919**
Total	**14873**	**4256**	**4302**	**3410**	**26841**

EST SETTLEMENT VS AGE GROUP

Age Group	Estimated Settlement
65+	71.13%
51-65	65.45%
41-50	60.95%
31-40	54.04%
25-30	46.27%
18-24	38.29%

SETTLEMENT EXPECTATIONS

Expected settlement percentages vary across age groups, with approximately **71%** for those aged **65 and older** and around **38%** for individuals aged **18 to 24**, indicating diverse expectations and behaviors.

Strategic Growth Pathways

Personalized Age Strategies:
Optimize product and marketing strategies based on age demographics, ensuring a targeted and unique value proposition for diverse customer segments.

Digital Excellence:
Elevate the online presence, focusing on the app and website, for cutting-edge customer experiences and market alignment.

Tech-Integrated Sales Force:
Invest strategically in technology for offline agents, enhancing both performance and customer experience.

Youth-Centric Strategies:
Tailor strategies for the 18-24 age group, tapping into innovative offerings to distinguish the company in this underserved segment.

Thank You