SHIELD INSURANCE COMPANY

- Shield Insurance is a top-tier provider of extensive insurance solutions.
- Dedicated to delivering outstanding service and value to clients.
- Emphasis on innovation and a customer-centric approach.
- Goal is to reshape the insurance industry through advanced technologies and data-driven insights.

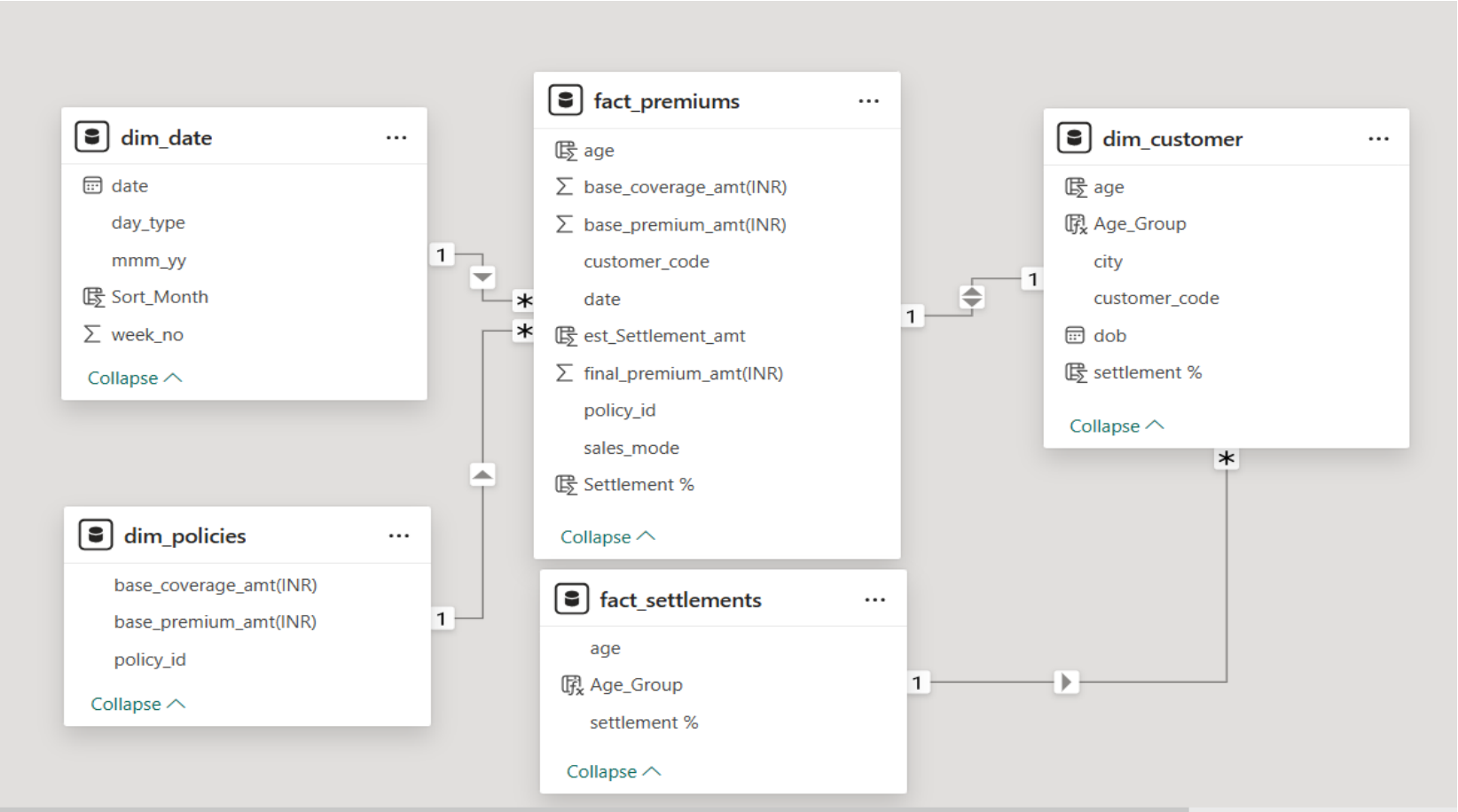
Dataset Used

Five CSV files containing 6 months of data (November 2022 – April 2023) were utilized to construct this dashboard:

- **dim_customer.csv:** Comprehensive information about customers.
- **dim_date.csv:** Dates presented at daily, monthly, and week number levels.
- **dim_policies.csv:** Complete dataset of policies.
- **fact_premiums.csv:** Details on policy orders, including premium information.
- **fact_settlements.csv:** Information regarding policy settlements.

Data Model

Star Schema Data Model



SHIELD INSURANCE ANALYSIS

General View

Evaluate the company's financial and customer performance through key data like monthly revenue, customer growth, daily revenue growth, daily customer growth, and overall trends.

Sales View

Assess the company's revenue and client performance across various sales modes, and project future trends.

Age Group View

Examine the company's revenue and client performance by age group, incorporating essential data such as customer count, sales mode, estimated settlement amount, and policy preferences.

NOTE: Data Is available from November 2022 to April 2023

Currency: INR

SHIELD INSURANCE

MRG	MCG	DRG	DCG
153.7M !	4.1K !	13.21M ✓	340.0 ✓
LM: 263.8M (-41.73%)	LM: 7.1K (-41.41%)	LM: 8.51M (+55.26%)	LM: 228.4 (+48.85%)
Apr_23	Apr_23	30/04/2023	30/04/2023

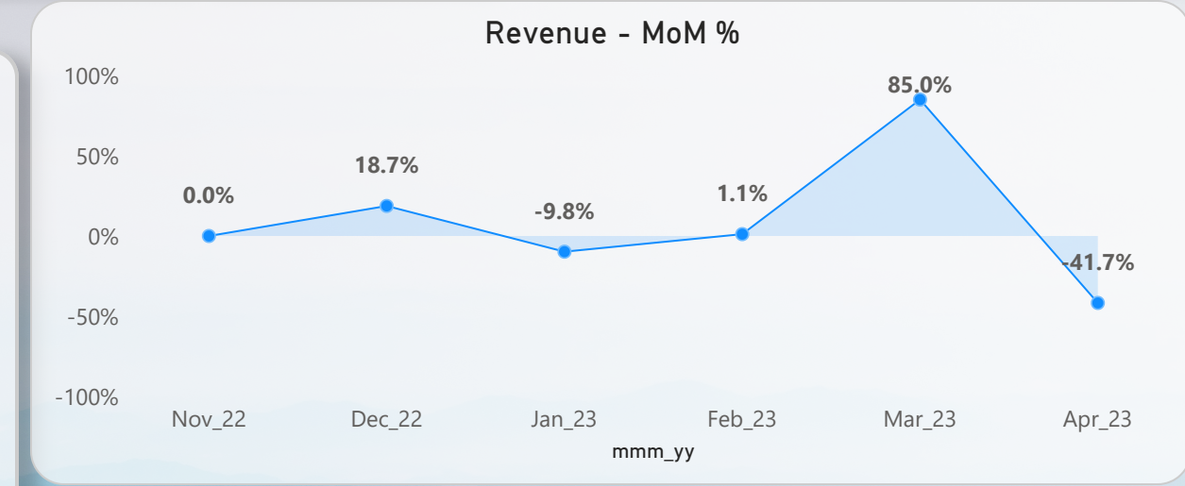
General View

Revenue - MoM %

Customer - MoM %

Customers Segmentation

city	Age Group	Total Revenue	Total Customers
Delhi NCR	31-40	128.2M	4.36K
Delhi NCR	41-50	90.0M	2.47K
Delhi NCR	65+	82.6M	0.92K
Mumbai	31-40	73.1M	2.45K
Delhi NCR	51-65	67.1M	1.24K
Mumbai	41-50	54.7M	1.44K
Hyderabad	31-40	50.8M	1.70K
Mumbai	65+	48.2M	0.54K
Mumbai	51-65	42.5M	0.78K
Hyderabad	41-50	39.1M	1.00K
Hyderabad	65+	33.5M	0.36K
Chennai	31-40	32.4M	1.14K
Indore	31-40	26.6M	0.82K
Hyderabad	51-65	25.5M	0.48K
Chennai	41-50	25.4M	0.67K
Delhi NCR	25-30	23.8M	1.27K
Chennai	65+	22.1M	0.24K
Total		**989.3M**	**26.84K**



Revenue Split

city	Total Revenue	Total Customers
Delhi NCR	401.6M	11.01K
Mumbai	239.5M	6.43K
Hyderabad	160.5M	4.34K
Chennai	106.3M	2.97K
Indore	81.3M	2.10K
Total	**989.3M**	**26.84K**

Customers Split

Age Group	Total Revenue	Total Customers
31-40	311.1M	10.46K
41-50	226.5M	6.03K
65+	203.9M	2.24K
51-65	165.6M	3.08K
25-30	56.7M	3.19K
18-24	25.3M	1.84K
Total	**989.3M**	**26.84K**

Filters

Month: All

Date: All

City: All

Sales Mo...: All

Policy id: All

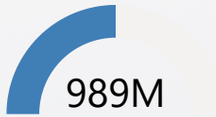
Age Group: All

MRG: Monthly Revenue Growth MCG: Monthly Customers Growth DRG: Daily Revenue Growth DCG: Daily Customer Growth Currency: INR

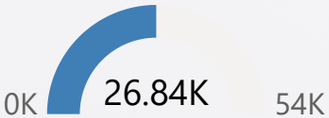
SHIELD INSURANCE

Sales View

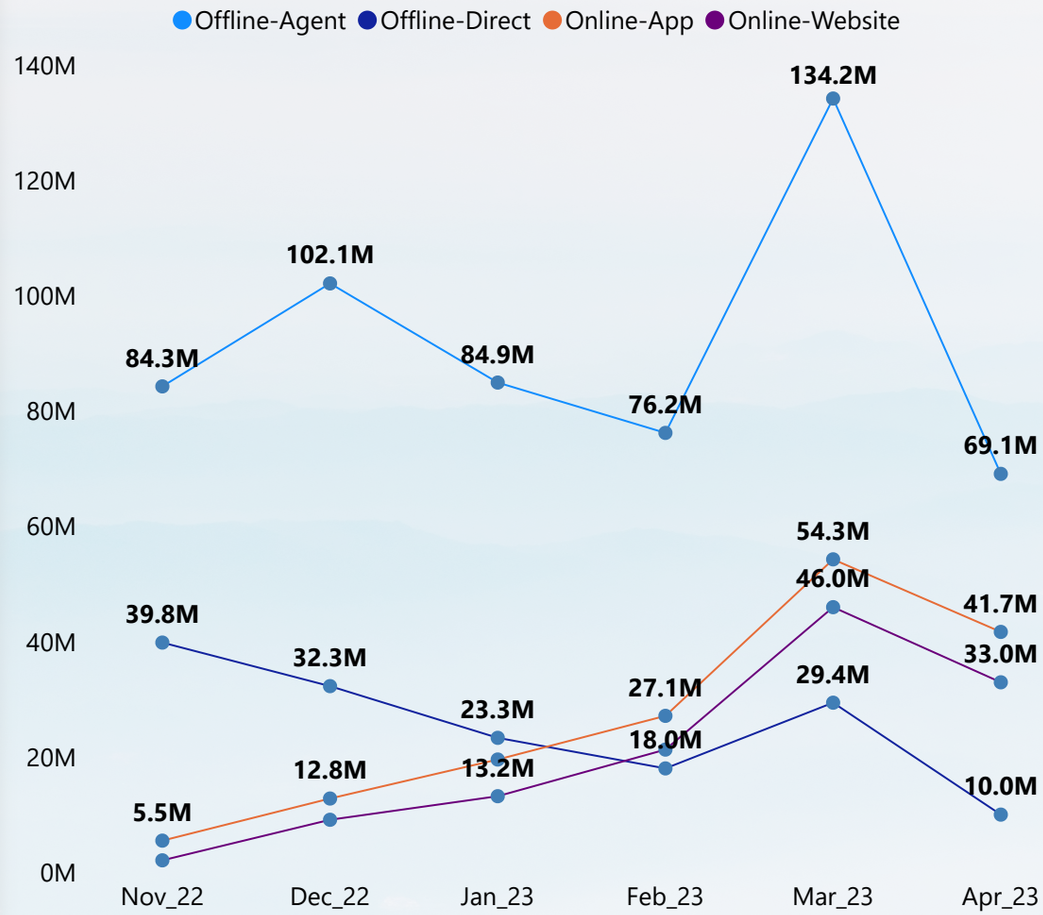
total revenue



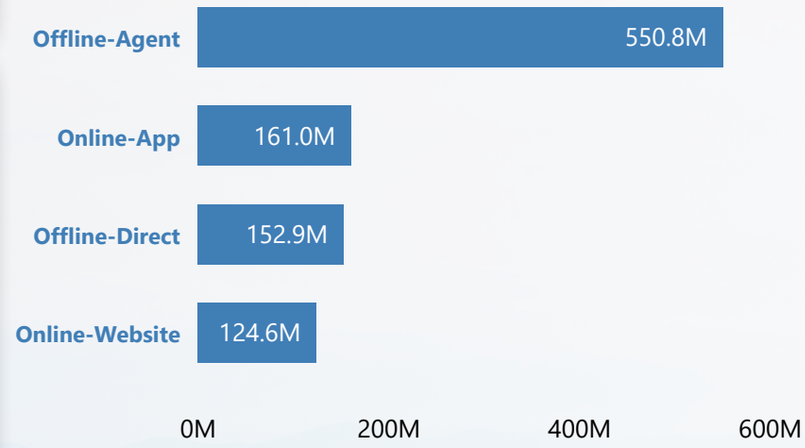
total customer



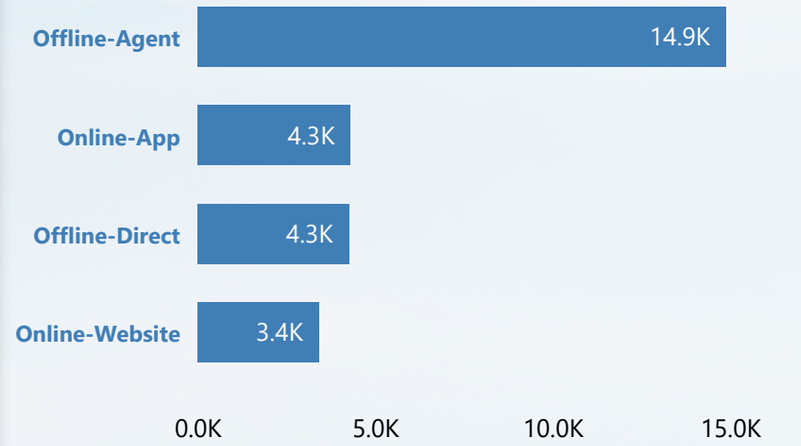
Revenue by Sales Mode Over Months



Revenue by Sales Mode



Customers by Sales Mode



Filters

Month: All

Date: All

City: All

Sales Mo...: All

Policy id: All

Age Group: All

MRG: Monthly Revenue Growth MCG: Monthly Customers Growth DRG: Daily Revenue Growth DCG: Daily Customer Growth Currency: INR

Age Group View

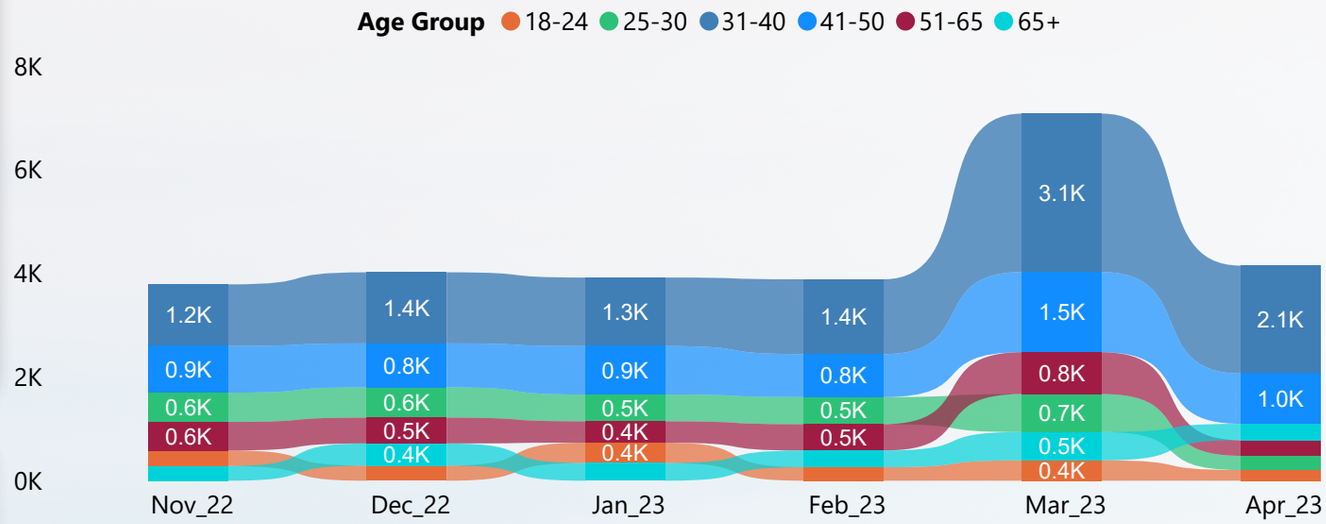
Age Groups by Sales Mode

sales_mode	total_customers
Offline-Agent	14.9K
Online-App	4.3K
Offline-Direct	4.3K
Online-Website	3.4K
Total	**26.8K**

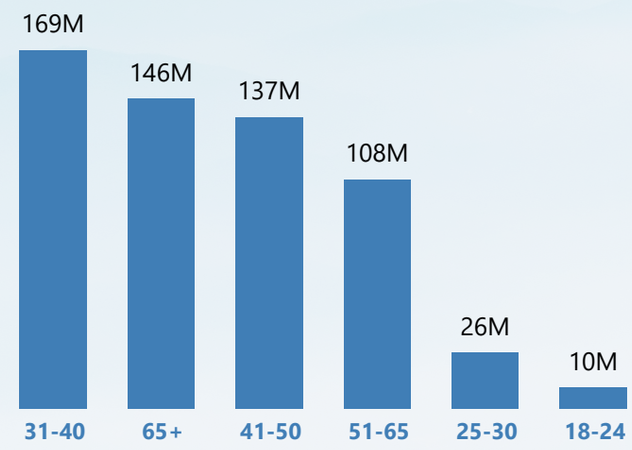
Policy Preference by Age Group

Age_Group	total_customers
31-40	10.5K
41-50	6.0K
25-30	3.2K
51-65	3.1K
65+	2.2K
18-24	1.8K
Total	**26.8K**

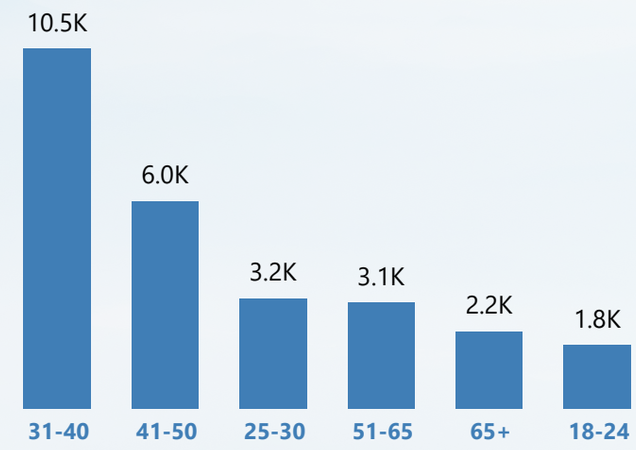
Monthly Customer Growth by Age Group



Estimated Settlement Amount by Age Groups



Customer by Age Groups



Filters

Month: All

Date: All

City: All

Sales Mo...: All

Policy id: All

Age Group: All

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