



## 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

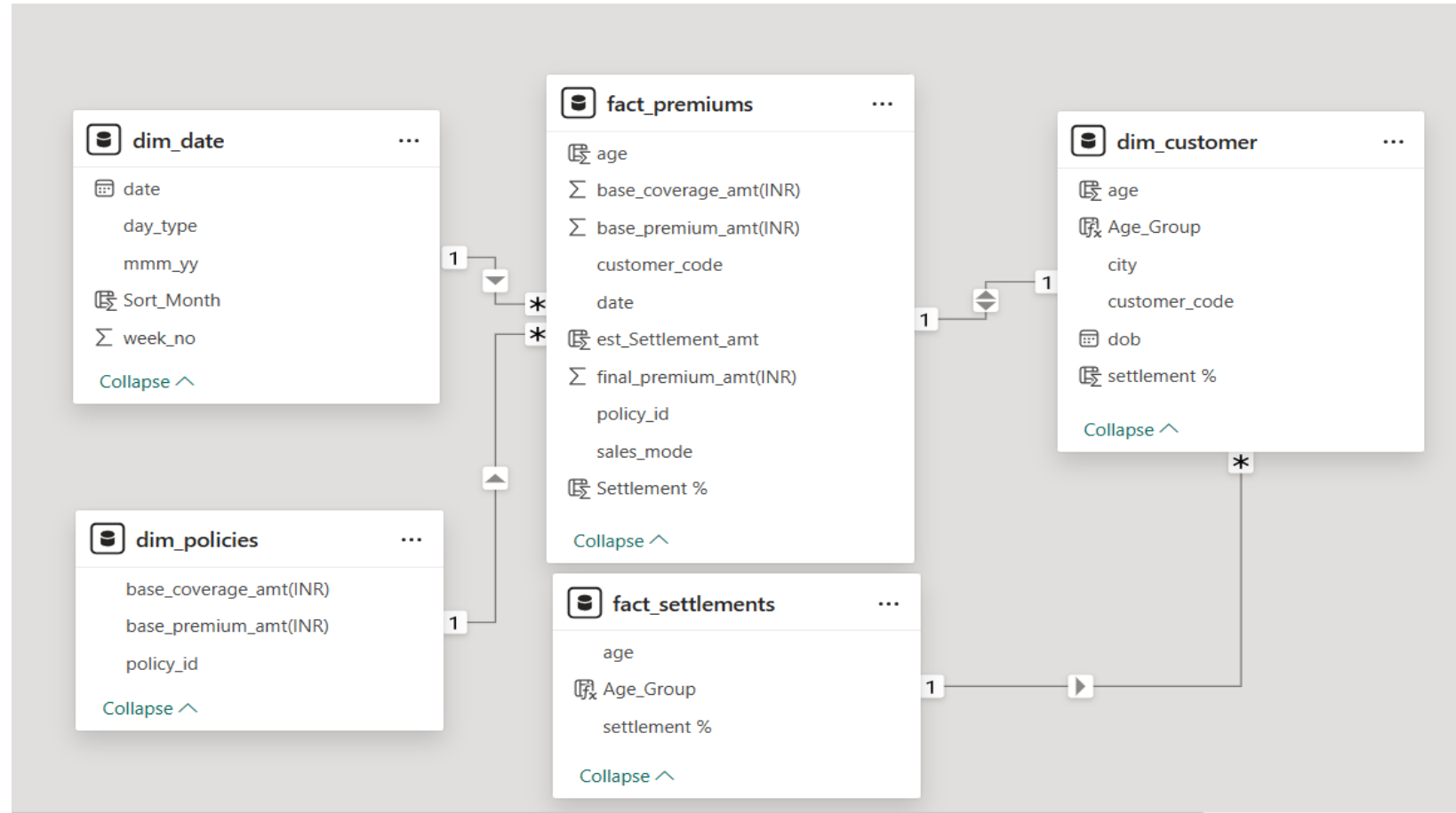
Five CSV files containing 6 months of data (November 2022 – April 2023) were utilized to construct this dashboard:

- **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.



MRG

153.7M!

PM: 263.8M (-41.73%)  
Apr\_23

MCG

4.1K!

PM: 7.1K (-41.41%)  
Apr\_23

DRG

13.21M✓

PD: 8.04M (+64.39%)  
30/04/2023

DCG

340✓

PD: 225 (+51.11%)  
30/04/2023

## General View

Revenue - MoM %

Customer - MoM %

Filters



Month

All

Date

All

City

All

Sales Mode

All

Policy id

All

Age Group

All

### 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 - MoM %



### 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

MRG: Monthly Revenue Growth

MCG: Monthly Customers Growth

DRG: Daily Revenue Growth

DCG: Daily Customer Growth

Currency: INR





Sales View

Filters

Month

All

Date

All

City

All

Sales Mode

All

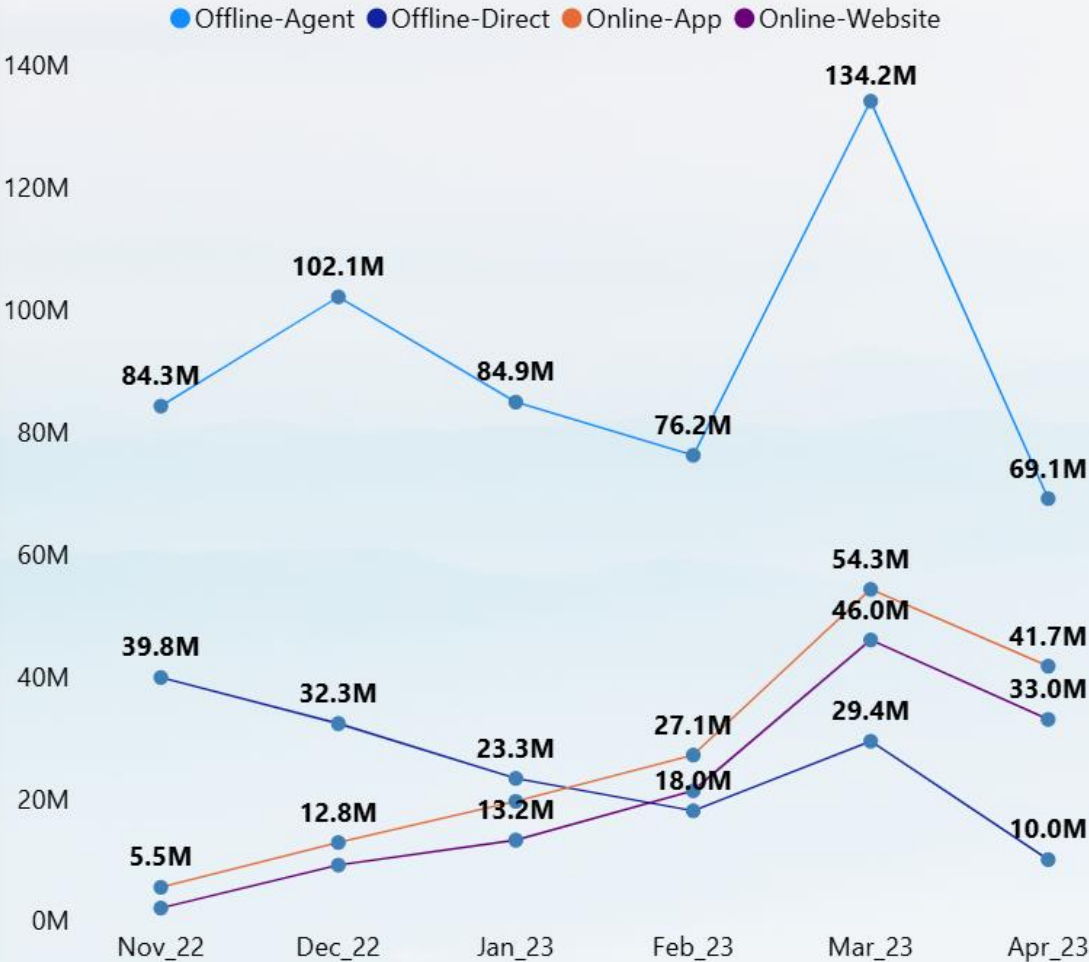
Policy id

All

Age Group

All

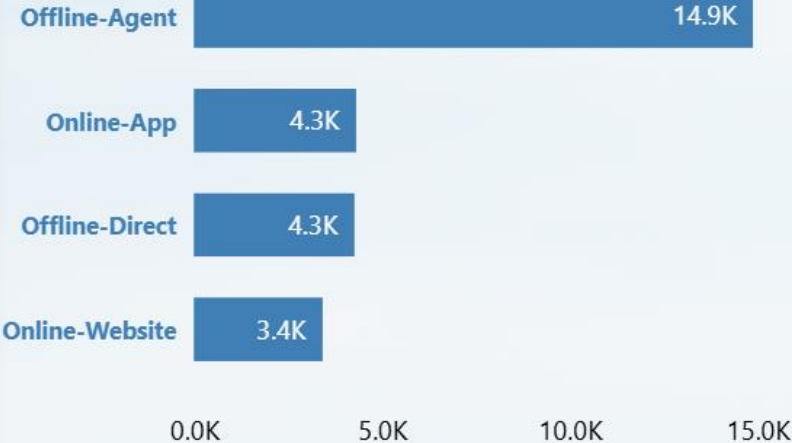
Revenue by Sales Mode Over Months



Revenue by Sales Mode



Customers by Sales Mode



MRG: Monthly Revenue Growth

MCG: Monthly Customers Growth

DRG: Daily Revenue Growth

DCG: Daily Customer Growth

Currency: INR

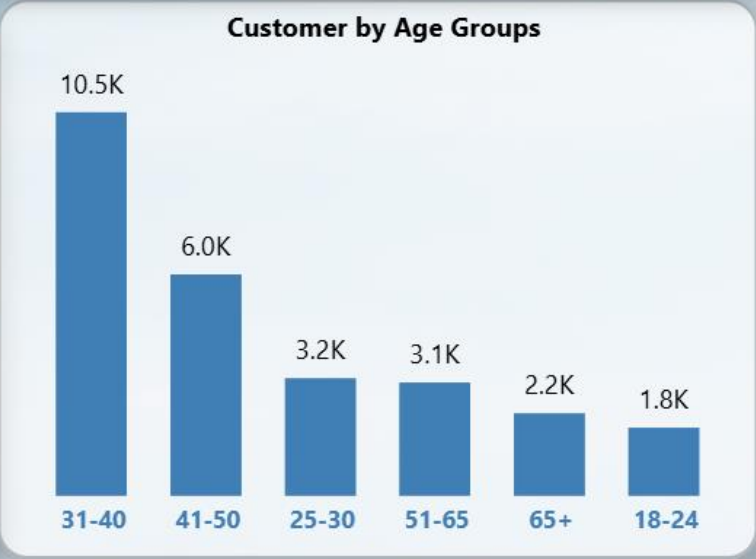
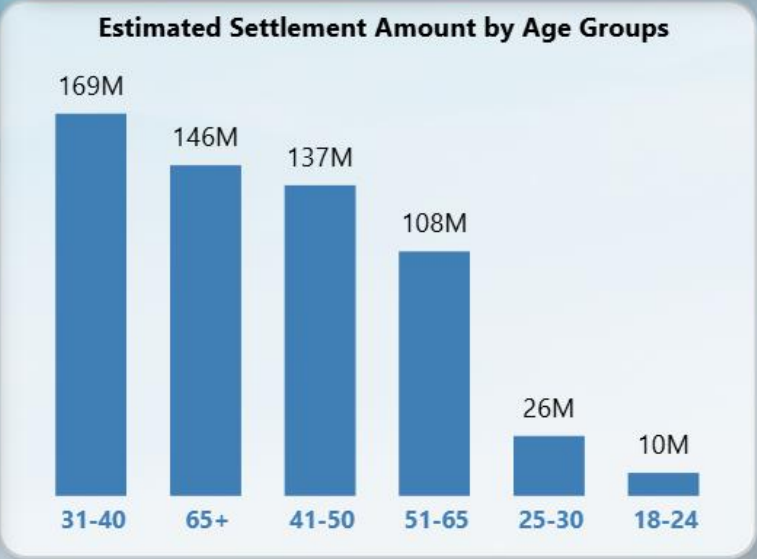
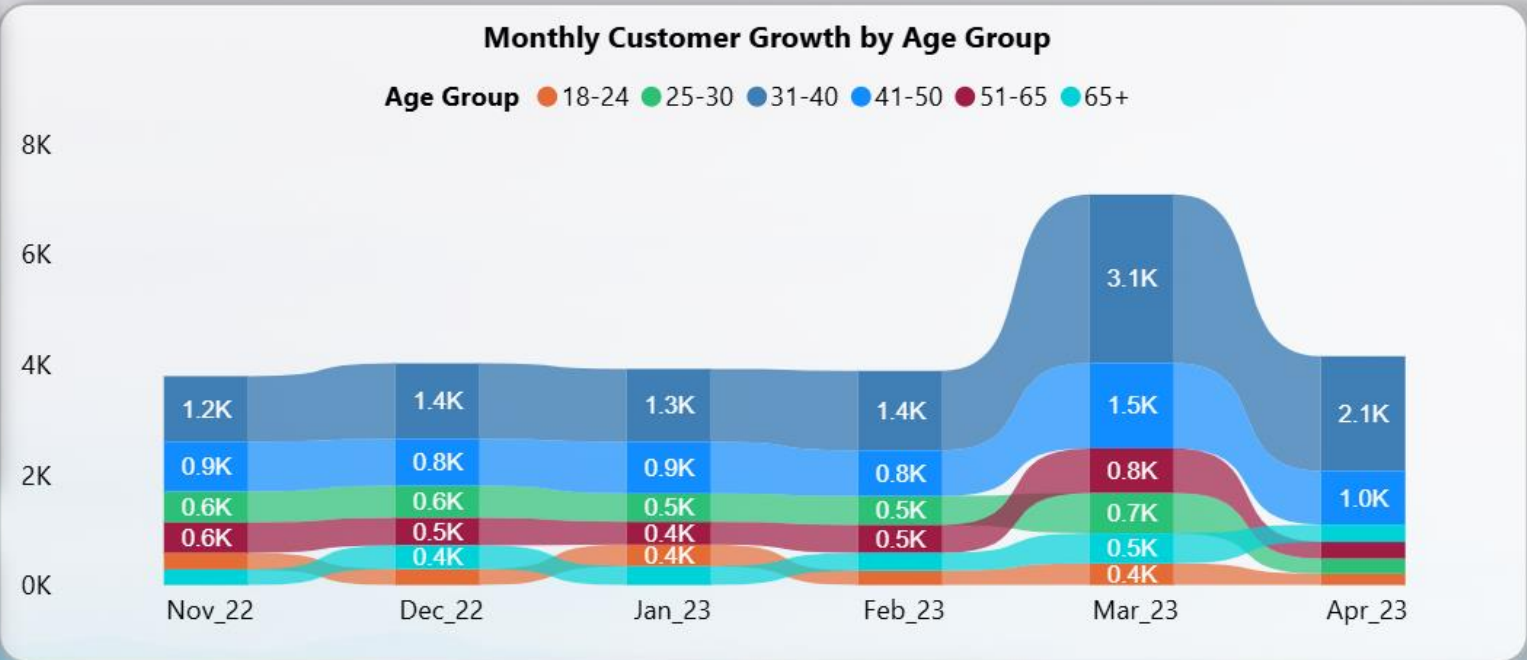


# Age Group View

sales_mode	total_customers
Offline-Agent	14.9K
31-40	5.6K
41-50	3.4K
25-30	1.8K
51-65	1.7K
65+	1.2K
18-24	1.1K
Total	26.8K

## Policy Preference by Age Group

Age_Group	total_customers
31-40	10.5K
POL3309HEL	1.8K
POL4331HEL	1.6K
POL4321HEL	1.5K
POL5319HEL	1.4K
POL6303HEL	1.2K
POL6093HEL	1.0K
POL9221HEL	0.8K
POL1048HEL	0.6K
POL2005HEL	0.5K
41-50	6.0K
25-30	2.2K
Total	26.8K



## Filters



Month

All

Date

All

City

All

Sales Mode

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