



SHIELD INSURANCE PROJECT

PRESENTED BY: SHREENAGA PINAKPANI





AGENDA



1

What is insurance?

2

Goal of Shield Insurance Project

3

General View details

4

Sales Mode details

5

Age Group Details

6

Conclusion





What is Insurance?

Insurance is the most effective risk management tool which can protect individuals and businesses from financial risks arising out of various contingencies.





GOAL



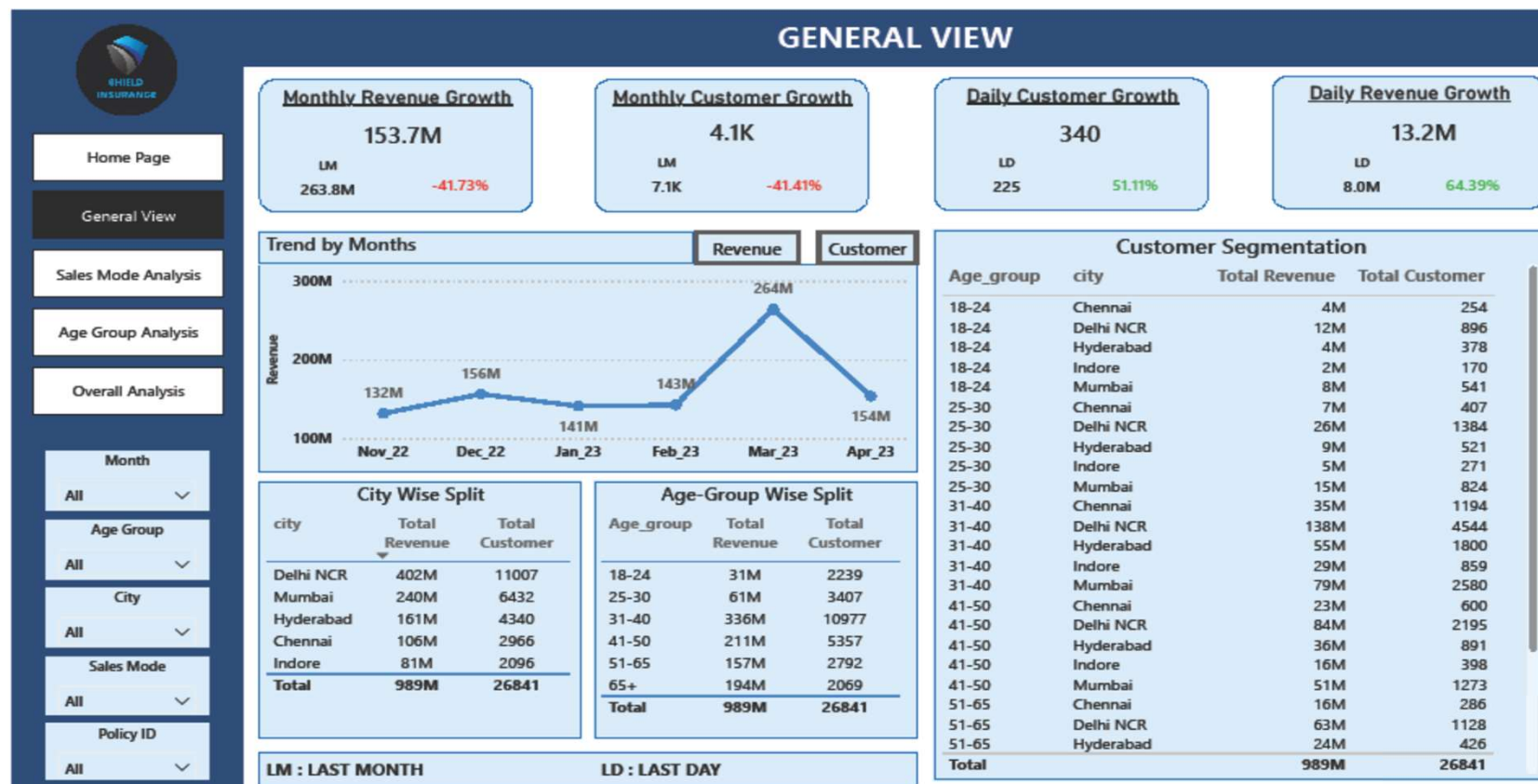
Goal of Shield Insurance Project

This project aims to maximize the runway and profitability of Shield Insurance's business, ensuring sustainable growth and success.





GENERAL VIEW





GENERAL VIEW INSIGHTS



General View provides quick overview of performance , segmented by various criteria.

Monthly Performance

Revenue: This month's revenue is 153.7M, a significant drop of 41.73% from the previous month's 263.8M.

Customers: Similarly, monthly customer growth stands at 4.1K, down by 41.41% from last month's 7.1K.

Daily Trends

Revenue: There's a substantial increase in daily revenue, rising to 13.2M from the previous day's 8.0M, marking a 64.39% growth.

Customer Count: Daily customer growth also sees a boost, with Current daily growth at 340 compared to the previous day's 225, showing a 51.11% increase.

City Wise Analysis

Top Performers: Delhi NCR leads with the highest revenue (402M) and customer count (11,007). Mumbai (240M, 6,432 customers) and Hyderabad (161M, 4,340 customers) follow.

Overall: Total revenue across major cities is 989M, with total customer base of 26,841.

Age Group Analysis

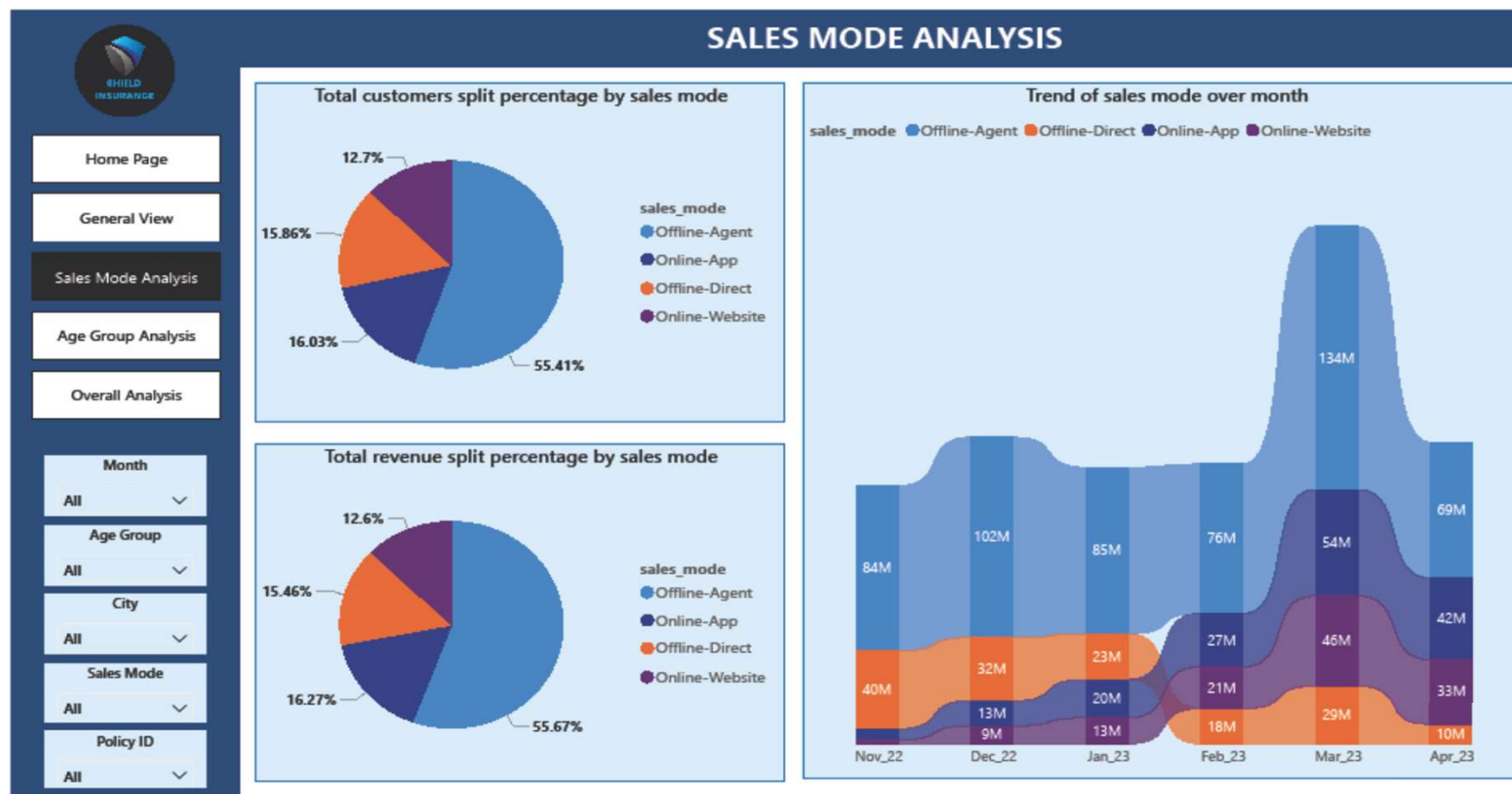
Dominant Segment: The 31-40 age group contributes the highest revenue (336M) and has the most customers (10,977), indicating strong engagement and profitability.

Other Segments: Significant contributions also come from the 41-50 age group (211M, 5,357 customers) and the 65+ age group (194M, 2,069 customers).





SALES MODE





SALES MODE INSIGHTS



Sales Mode shows revenue & customer projections.

Sales Mode Distribution

Customers: Offline Agent mode accounts for the largest share at 55.41%, followed by Online App at 16.03%, Offline Direct at 15.86%, and Online Website at 12.7%.

Revenue: A similar distribution with Offline Agent leading at 55.67%, followed by Online App at 16.27%, Offline Direct at 15.46%, and Online Website at 12.6%.

Trend Over Time

Offline Agent Sales: Consistently the highest, peaking at 134M in March 2023.

Sales Performance

Monthly Variations: Noticeable fluctuations across sales modes, indicating potential seasonal trends or marketing impacts. Offline Agent sales are predominant.

Customer Preferences

Offline Agent: Dominant among customers, suggesting a preference for personal interaction.

Online Channels: Steady growth, particularly with Online App, indicating a shift towards digital convenience among certain customer segments.





AGE GROUP



Home Page

General View

Sales Mode Analysis

Age Group Analysis

Overall Analysis

Month

All

Age Group

All

City

All

Sales Mode

All

Policy ID

All

AGE GROUP ANALYSIS

Age group vs policy preference (Revenue)

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL1048HEL	3M	9M	58M	34M	27M	37M	168M
POL2005HEL	5M	11M	79M	56M	61M	113M	324M
POL3309HEL	3M	6M	28M	11M	5M	2M	56M
POL4321HEL	5M	6M	9M	3M	1M	1M	25M
POL4331HEL	4M	5M	15M	6M	2M	2M	34M
POL5319HEL	2M	6M	30M	19M	9M	4M	70M
POL6093HEL	3M	7M	40M	28M	15M	10M	103M
POL6303HEL	2M	6M	33M	23M	12M	5M	82M
POL9221HEL	3M	6M	44M	31M	25M	19M	128M
Total	31M	61M	336M	211M	157M	194M	989M

Age group vs expected settlement



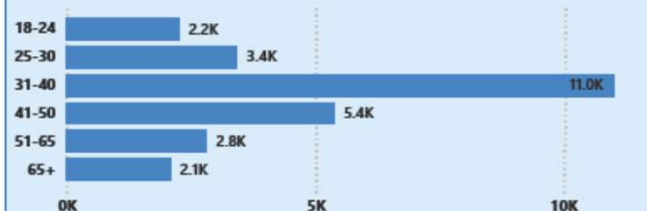
Age group vs sales mode (Revenue)

sales_mode	18-24	25-30	31-40	41-50	51-65	65+	Total
Offline-Agent	19M	35M	182M	118M	91M	106M	551M
Offline-Direct	5M	11M	49M	33M	23M	32M	153M
Online-App	4M	9M	55M	33M	24M	35M	161M
Online-Website	3M	7M	49M	26M	18M	21M	125M
Total	31M	61M	336M	211M	157M	194M	989M

Trend Chart by Age Group



Total Customer by Age group





AGE GROUP INSIGHTS



Age Group highlights differing needs and behaviors of each age group.

Revenue Distribution

Highest Revenue: The 31-40 age group generates the highest revenue across various policies, indicating strong engagement with this demographic.

Revenue by Policy: Each age group contributes differently, with significant revenue from policies tailored to their specific needs.

Expected Settlement

31-40 Age Group: Has the highest expected settlement at 517M, suggesting a high value of claims in this segment.

Others: Other notable groups include 41-50 at 338M and 65+ at 332M.

Customer Trends

Growth Over Time: The 31-40 and 41-50 age groups show consistent increase in customer numbers from November 2022 to April 2023.

Total Customers: The 31-40 age group has the highest customer count at 11.0K, followed by the 41-50 group at 5.4K.

Sales Mode Preferences

Offline Agent Dominance: This mode is preferred across all age groups, with the highest revenue generation.

Online Platforms: Growing trend, especially among younger customers (18-30), indicating a shift towards digital engagement.





CONCLUSION



These findings highlight the importance of understanding customer behavior and preferences across different segments to drive targeted strategies and ensure sustained growth for Shield Insurance.





Thank you for taking the time to listen.

SPECIAL THANKS TO MR. DHAVAL PATEL AND MR. HEMANAND VADIVEL FOR DESIGNING EASY TO LEARN BOOTCAMP

