1. Demographics & Location Insights

- **Age/Gender Impact:**
  - What is the average Sum Insured (SI) and sales conversion rate for males vs. females?
  - Show me the distribution of SI requested vs. SI finalized, broken down by age bracket (e.g., 30-40, 40-50).
  - Is there a significant difference in sales success rate between different age groups?
  - Which age and gender combination represents our most valuable customer segment in terms of finalized SI?
- **Location Impact (RURAL vs. Metro / State):**
  - Compare the average SI and conversion rates for customers in RURAL vs. Metro postcodes.
  - Which state shows the highest average SI? Which has the highest conversion rate?
  - Are there specific regions where we see a higher drop-off rate after the initial quote?
  - Correlate location type (RURAL/Metro) with age/gender to see if specific segments dominate certain areas.

2. Lifestyle & Underwriting Insights

- **Lifestyle Factors (Smoking, etc.):**
  - How does smoker status impact the likelihood of a sale completion and the average finalized SI?
  - Based on call transcripts, what other lifestyle factors (e.g., occupation, hazardous hobbies mentioned) frequently correlate with higher/lower SI or failed sales?
  - Is there a difference in conversion rate for smokers vs. non-smokers?
- **Underwriting Impact:**
  - What percentage of quotes require significant SI adjustments after underwriting questions?
  - Which specific underwriting topics (e.g., pre-existing conditions, family history mentioned in calls) most frequently lead to non-conversion?
  - Show the difference between initially requested SI and finalized SI for customers who disclosed specific health conditions during the calls.

- o Is there a correlation between the complexity of underwriting discussions (e.g., length of discussion, number of health questions asked in transcripts) and the final sale outcome?

3. Sales Process & Efficiency Insights

- **Sales Cycle:**
  - o What is the average number of sales calls required to close a sale?
  - o How does the number of calls correlate with the final SI amount? (e.g., do higher SI value take more calls?)
  - o What is the conversion rate for customers contacted once vs. multiple times?
  - o Show the distribution of sales based on the number of interactions.
- **Conversion Funnel:**
  - o What is our overall quote-to-sale conversion rate?
  - o At which stage (initial quote, after underwriting, follow-up calls) do we lose the most potential customers?
  - o Based on transcript analysis, what are the most common objections raised by customers who don't proceed?

4. Agent Performance Insights (Requires Agent ID in data)

- Which sales agents have the highest conversion rates?
- Compare the average finalized SI per agent.
- Is there a difference in the average number of calls per sale among different agents?
- Analyze transcripts for successful agents: what language or techniques are they using effectively?

5. Broader Strategic Questions

- What is the profile (demographics, location, lifestyle indicators) of our most profitable customers (high SI, high conversion)?
- Are there emerging trends in customer objections or reasons for non-completion based on recent call transcripts?
- How does the initially requested SI on the web form compare to the average finalized SI across all successful sales?
- Can we identify customer segments where our conversion rate is significantly lower than average?