



Shield Insurance Analysis

Code basics Internship Project

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About Shield Insurance

- Shield Insurance offers comprehensive and personalized insurance solutions designed to meet the needs of individuals and families across all age groups.
- With a strong commitment to customer satisfaction, Shield Insurance has earned a reputation as a trusted partner in safeguarding the future.
- Known for dependable coverage and a people-first approach, the company ensures protection against life's uncertainties, giving clients peace of mind and security.

Objective

- The goal is to support Shield Insurance in leveraging a user-friendly, insight-driven dashboard that empowers data-informed decision-making.
- As a Data Analyst Intern, my responsibilities include interacting with clients, conducting data analysis, and designing customized, intelligent dashboards that align with their business goals.
- The final deliverables include a fully interactive dashboard, a comprehensive presentation, and showcasing the full potential of data utilization across the organization.

Project Details

Shield Insurance:

Shield Insurance is a leading provider of insurance services, operating across five major cities in India:

- Delhi NCR
- Mumbai
- Hyderabad
- Chennai
- Indore

The company offers a diverse portfolio of 9 insurance policy types, catering to the varying needs of its customers.

Sr. No.	Policy_id	base_coverage_amt(INR)	base_premium_amt(INR)
1	POL4321HEL	200000	5000
2	POL4331HEL	300000	7500
3	POL3309HEL	500000	12000
4	POL5319HEL	750000	16700
5	POL6303HEL	1000000	21500
6	POL6093HEL	1500000	31700
7	POL9221HEL	2500000	42500
8	POL1048HEL	5000000	76500
9	POL2005HEL	10000000	120000

The company operates through two primary sales modes, each with two distinct categories:

Offline Mode

- Sales Agent
- Direct Sales

Online Mode

- Mobile Application
- Website

Customers must be at least 18 years of age.



Age Categories

- 18–24 years
- 25–30 years
- 31–40 years
- 41–50 years
- 51–65 years
- 65 years and above

Input Dataset:

1. dim_customer
2. dim_policies
3. dim_date
4. fact_Premiums
5. fact_Settlements

Data was available from November 2022 to April 2023



Dashboard Overview



SHIELD INSURANCE ANALYSIS



Home View



Performance Analysis



Sales Mode Analysis



Age Group Analysis



PERFORMANCE ANALYSIS

Month
All

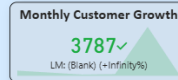
City
All

Policy_id
All

Sales_mode
All

Age Group
All

Clear all
slicers

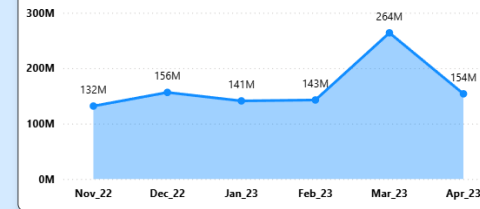


Blank : No data available before November, 2022

LM = Last Month, DCG = Daily Customer Growth, DRG = Daily Revenue Growth

Show Customers

Revenue trend by month



Age group wise Split

Age Group	Total_Customers	Total_Revenue
31-40	11455	356.03M
41-50	4699	196.02M
65+	1919	184.89M
51-65	2511	148.41M
25-30	3617	67.71M
18-24	2640	36.19M
Total	26841	989.25M

Customer & Revenue Segmentation by City & Age group

Age Group	city	Total_Customers	Total_Revenue
31-40	Delhi NCR	4741	146.49M
31-40	Mumbai	2703	84.62M
41-50	Delhi NCR	1899	77.61M
65+	Delhi NCR	801	75.29M
51-65	Delhi NCR	1030	59.98M
31-40	Hyderabad	1886	58.09M
41-50	Mumbai	1130	47.60M
65+	Mumbai	457	43.52M
51-65	Mumbai	632	37.60M
25-30	Chennai	1926	36.00M
Total		26841	989.25M

City wise Split

city	Total_Customers	Total_Revenue
Delhi NCR	11007	401.57M
Mumbai	6432	239.51M
Hyderabad	4340	160.52M
Chennai	2966	106.31M
Indore	2096	81.35M
Total	26841	989.25M



SALES MODE ANALYSIS

Month
All

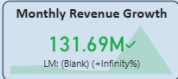
City
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Policy_id
All

Sales_mode
All

Age Group
All

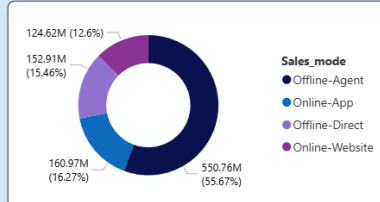
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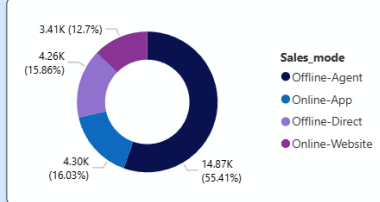
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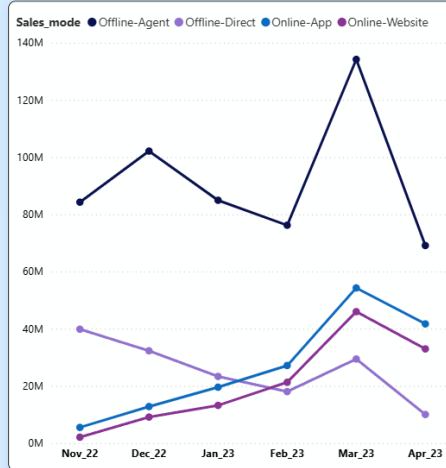
Total Revenue Split % by Sales mode



Total Customer Split % by Sales mode



Sales Trend Mode over the Month



AGE GROUP ANALYSIS

Month
All

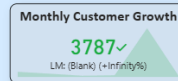
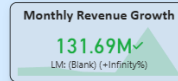
City
All

Policy_id
All

Sales_mode
All

Age Group
All

Clear all
slicers



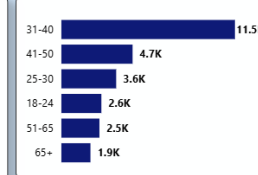
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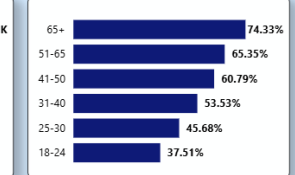
Age Group vs Policy Preference

policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL1048HEL	45	127	659	313	228	296	1668
POL2005HEL	47	86	578	333	354	570	1968
POL3309HEL	315	555	2026	571	256	106	3829
POL4321HEL	1223	1172	1405	351	187	96	4434
POL4331HEL	551	679	1741	460	179	125	3735
POL5319HEL	134	347	1628	755	314	151	3329
POL6093HEL	111	223	1114	633	273	189	2543
POL6303HEL	131	281	1383	772	314	136	3017
POL9221HEL	83	147	921	511	406	250	2318
Total	2640	3617	11455	4699	2511	1919	26841

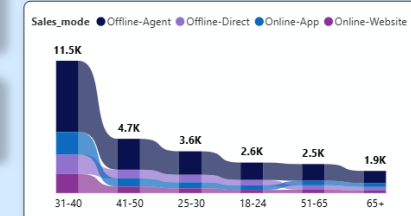
Total Customer by Age Group



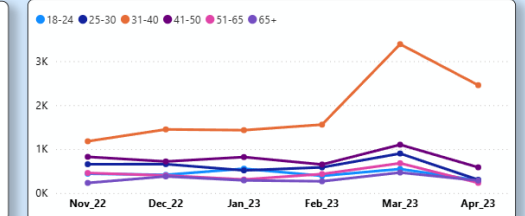
Age Group vs Expected Settlement%



Age Group vs Sales mode



Trend Chart by Age Group (Total Customers)



LM = Last Month, DCG = Daily Customer Growth, DRG = Daily Revenue Growth

Insights:

- **Top Month:** March 2023 had the highest number of new customers and the most revenue earned.
- **Delhi NCR on Top:** Among all five cities, Delhi NCR had the most customers and the highest revenue.
- **Strong Age Group:** Most customers and revenue came from people aged 31 to 40.
- **Best Sales Mode – Agent (Offline):** Most customers bought policies through sales agents, which also brought in the highest revenue.
- **Online Growth:** Sales through the mobile app and website started growing from February 2023, while direct offline sales went down.
- **Most Popular Policy:** Policy ID 'POL4321HEL' (₹5,000 base premium) was chosen by over 4,000 customers.
- **Policy Preference by Age:** People aged 31–40 preferred all types of policies more than any other age group.

Recommendations :

- **March Performance Review:** Find out what worked so well in March to repeat that success in the future.
- **City Growth Plan:** Use the winning strategies from Delhi NCR to help other cities grow their revenue, too.
- **Focus on Age 31–40:** Create special marketing campaigns or policy options for the 31–40 age group since they are the most active.
- **Improve Direct Sales:** Use ideas from the successful online app and website sales to boost the offline direct sales method.
- **Popular Policy Expansion:** Offer new versions or upgrades of the popular 'POL4321HEL' policy to attract more customers from different age groups.

Dashboard Resources Utilized

Image courtesy:

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Thank you for your attention

