



Insurance Policy Analysis

Presented By
Sunita Trivedi





Overall View

The shield insurance project provide general view with monthly and daily trends by revenue and monthly and daily growth rate by customer.



Sales Analysis

The Sales view analysis of insurance data provide insight in revenue and customer trends



Age Group Analysis

The analysis of insurance data by age group offers valuable insights into revenue and customer trends across various age demographics.



Agenda

Insurance Policy Analysis

Introduction

General Analysis

Sales Analysis

Age Group
Analysis

Recommendation



Business Scenario

The primary objective is to comprehensively understand customer numbers and total revenue, with a focus on daily growth rates and monthly policy change monitoring to identify trends. Customer segmentation by age group and city, combined with switchable trend graphs and detailed sales mode analysis, facilitates efficient progress tracking.

Further enhance the understanding of customer demographics, informing strategic business decisions.



Month	Date	City	sales_mode	policy_id	age_group
All	All	All	All	All	All

989M
Total_Revenue

27K
Total Customer

Customer Trend

Show Customer

Show Revenue

Home

Monthly Revenue Growth
131.69M ✓
LM: (Blank) (+131.69M)

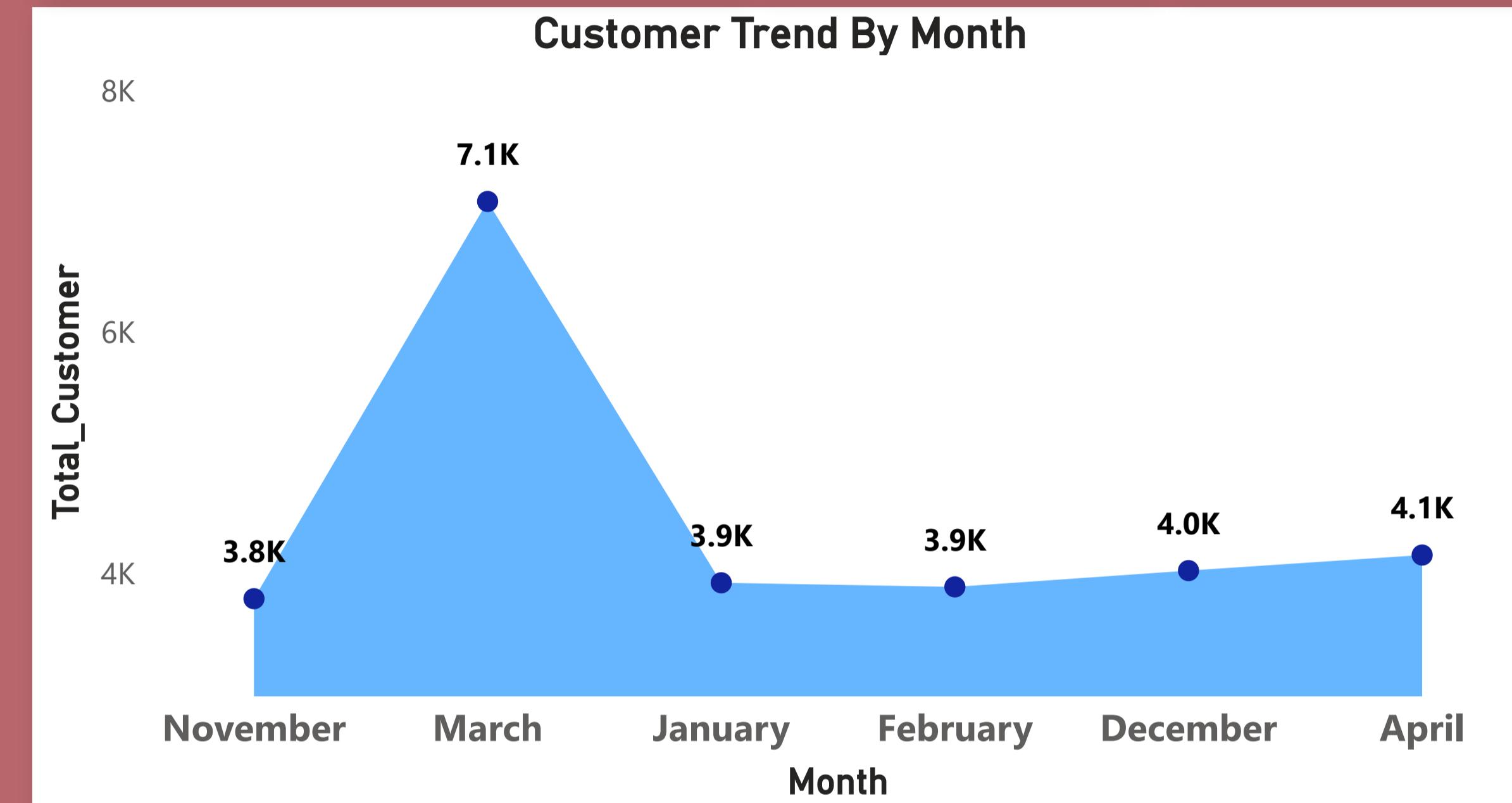
Daily Revenue Growth
13.21M ✓
LD_Revenue: 8.04M (+64.39%)

Monthly Customer Growth
3787 ✓
LM: (Blank) (+Infinity%)

Daily Customer Growth
340 ✓
LD: 225 (+51.11%)

Customer Segment

City	Age_group	Total_Customer	Total_Revenue
Chennai	18-24	254	4M
Chennai	25-30	407	7M
Chennai	31-40	1194	35M
Chennai	41-50	600	23M
Chennai	51-65	286	16M
Chennai	65+	225	21M
Delhi NCR	18-24	896	12M
Delhi NCR	25-30	1384	26M
Delhi NCR	31-40	4544	138M
Delhi NCR	41-50	2195	84M
Delhi NCR	51-65	1128	63M
Total		26841	989M



Sales View

Age Group

Abbreviation:

LM: Last Month

LD: Last Day

City Wise Split

City	Total_Customer	Total_Revenue
Indore	2096	81M
Chennai	2966	106M
Hyderabad	4340	161M
Mumbai	6432	240M
Delhi NCR	11007	402M
Total	26841	989M

Age wise split

Age_group	Total_Customer	Total_Revenue
18-24	2239	31M
25-30	3407	61M
31-40	10977	336M
41-50	5357	211M
51-65	2792	157M
65+	2069	194M
Total	26841	989M



Month	Date	City	sales_mode	policy_id	age_group
All	All	All	All	All	All

Daily_Revenue_Growth

13.21M ✓

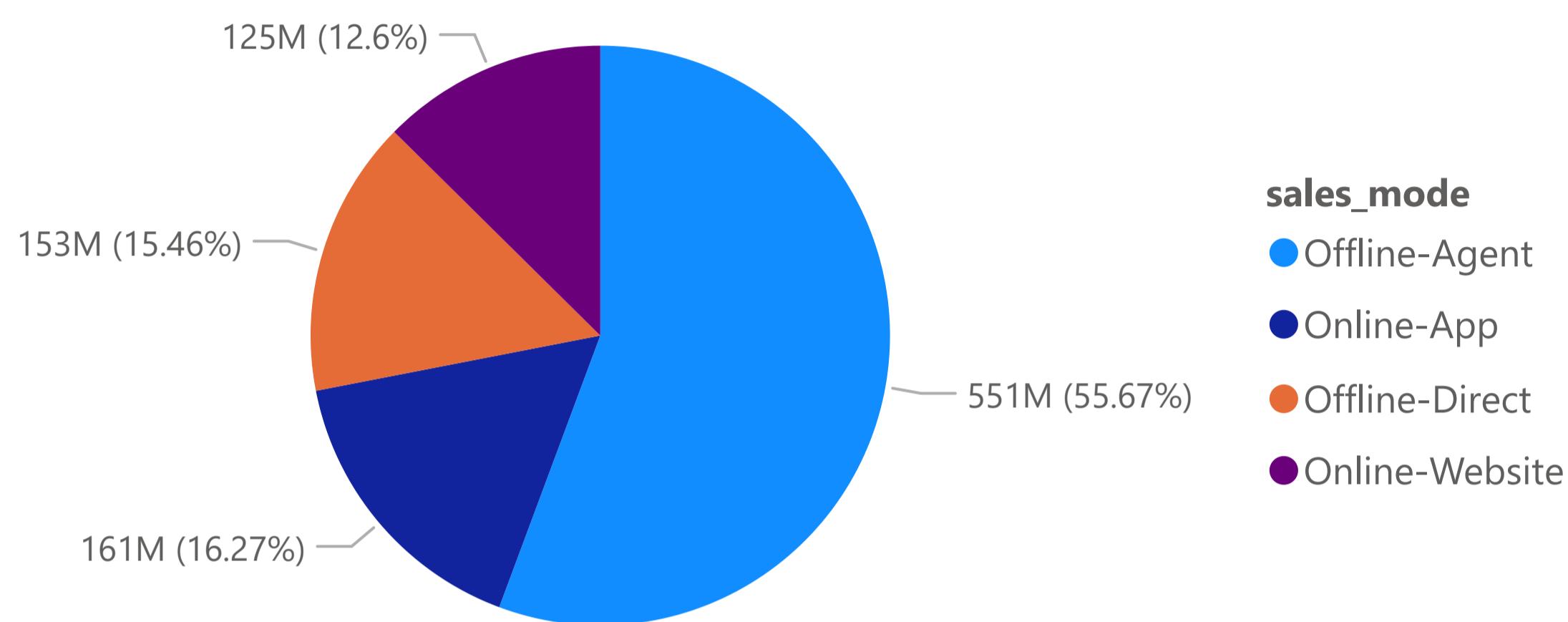
LD_Revenue: 8.04M
(+64.39%)

Monthly Revenue Growth

131.69M ✓

LM: (Blank) (+131.69M)

Total Revenue By sales mode



Daily Customer Growth

340 ✓

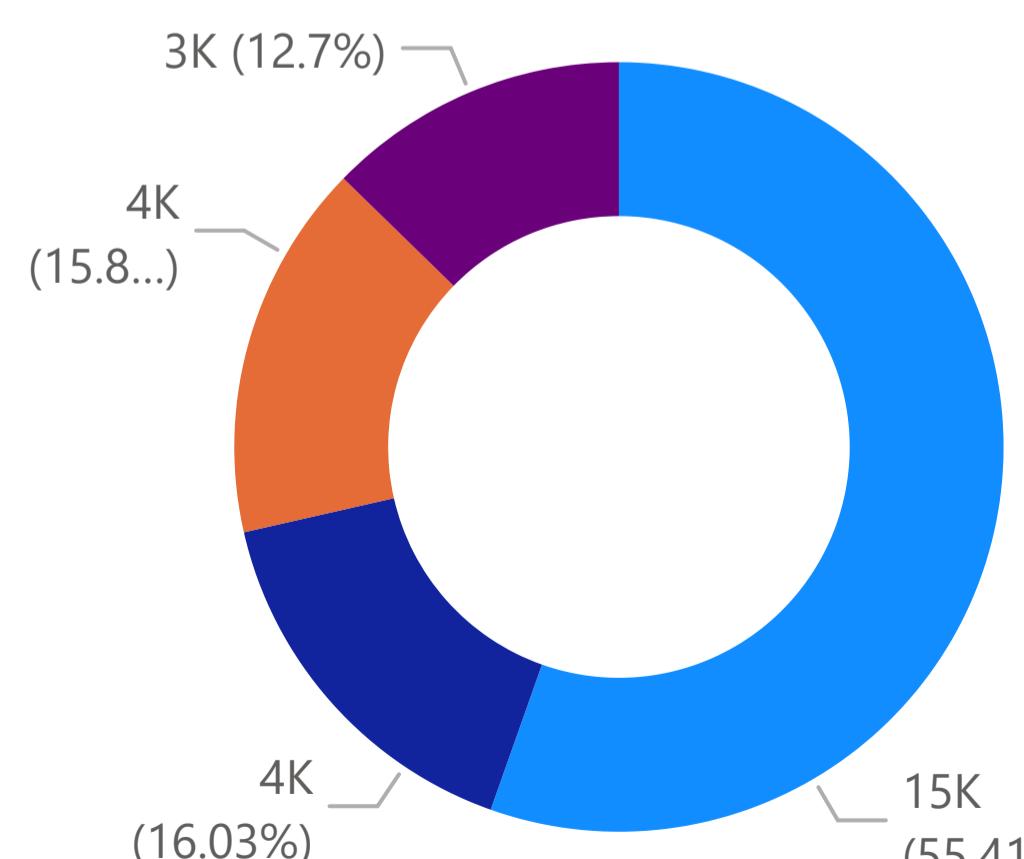
LD: 225 (+51.11%)

Monthly Customer Growth

3787 ✓

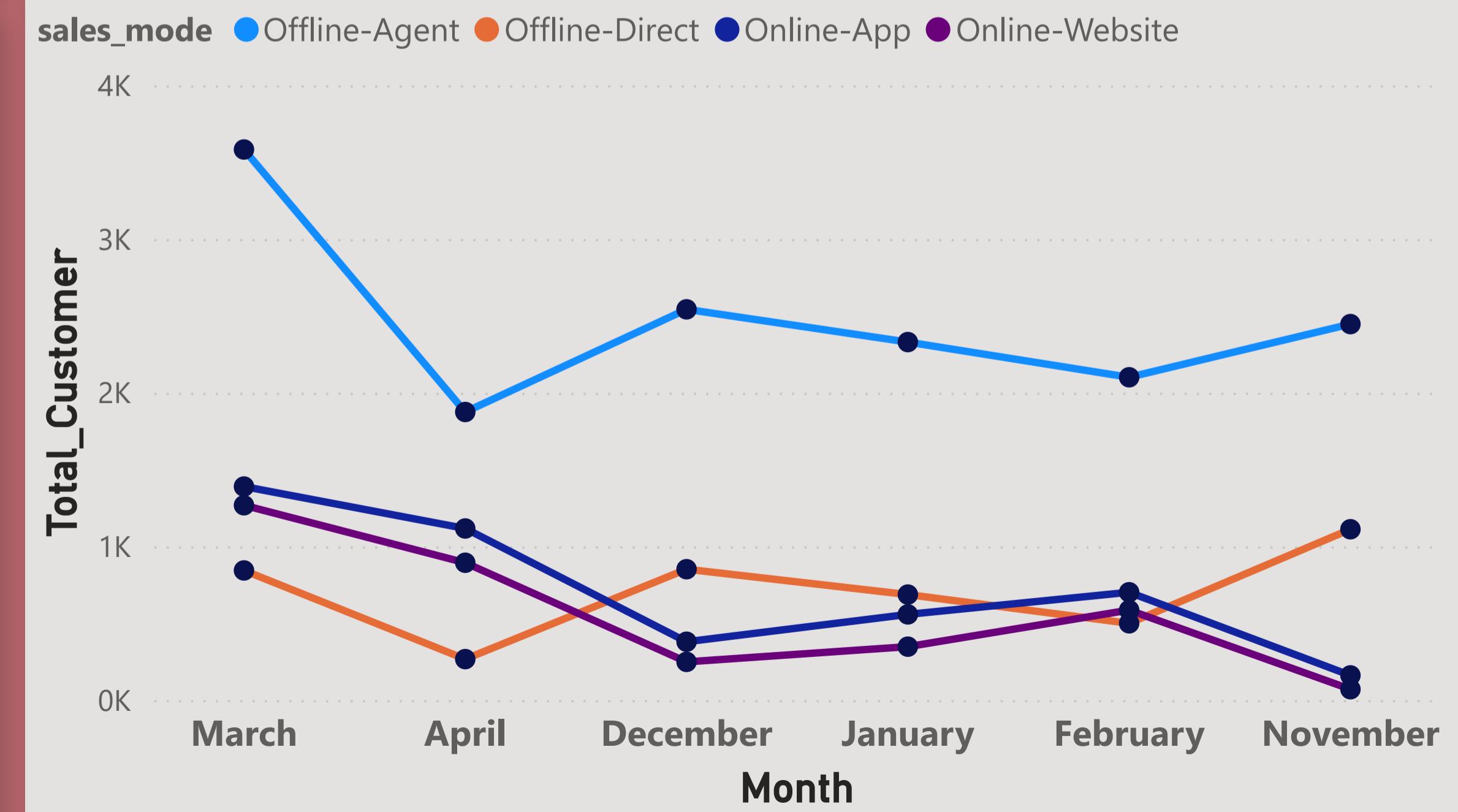
LM: (Blank) (+Infinity%)

Total Customer by Sales Mode



sales_mode
● Offline-Agent
● Online-App
● Offline-Direct
● Online-Website

Customer Trend By Month



Age Group



Abbreviation:

LM: Last Month

LD: Last Day

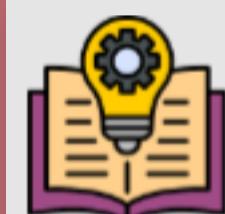


Month	All	Date	All	City	All	sales_mode	All	policy_id	All	age_group	All
-------	-----	------	-----	------	-----	------------	-----	-----------	-----	-----------	-----

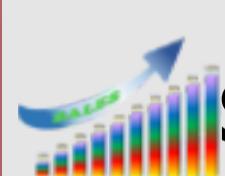
policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL1048HEL	40	111	629	340	244	304	1668
POL2005HEL	39	83	545	351	358	592	1968
POL3309HEL	276	490	1945	707	287	124	3829
POL4321HEL	1044	1175	1449	453	209	104	4434
POL4331HEL	455	661	1686	592	207	134	3735
POL5319HEL	109	318	1511	862	361	168	3329
POL6093HEL	95	197	1051	670	326	204	2543
POL6303HEL	110	249	1297	824	381	156	3017
POL9221HEL	71	123	864	558	419	283	2318
Total	2239	3407	10977	5357	2792	2069	26841



Home



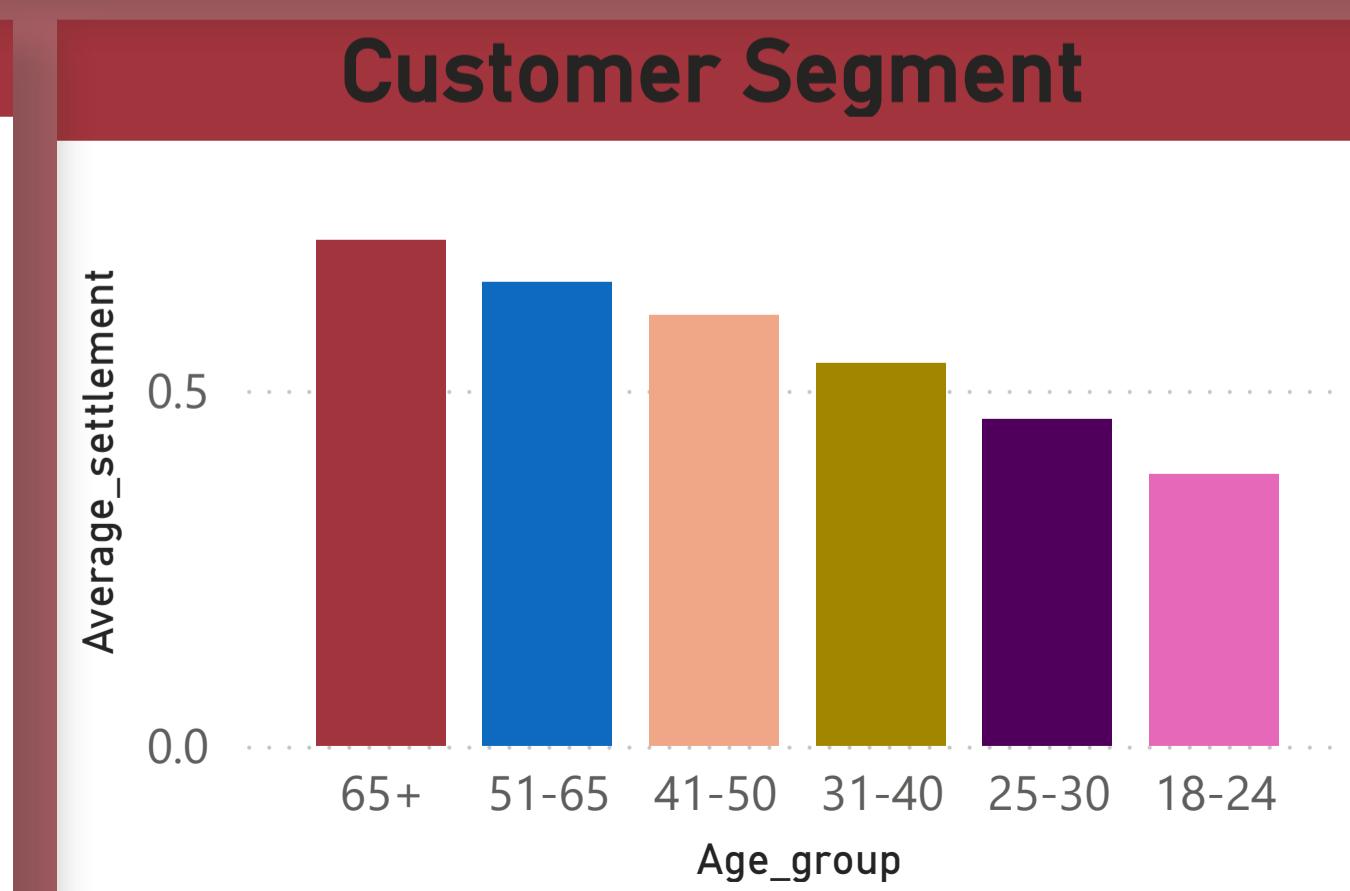
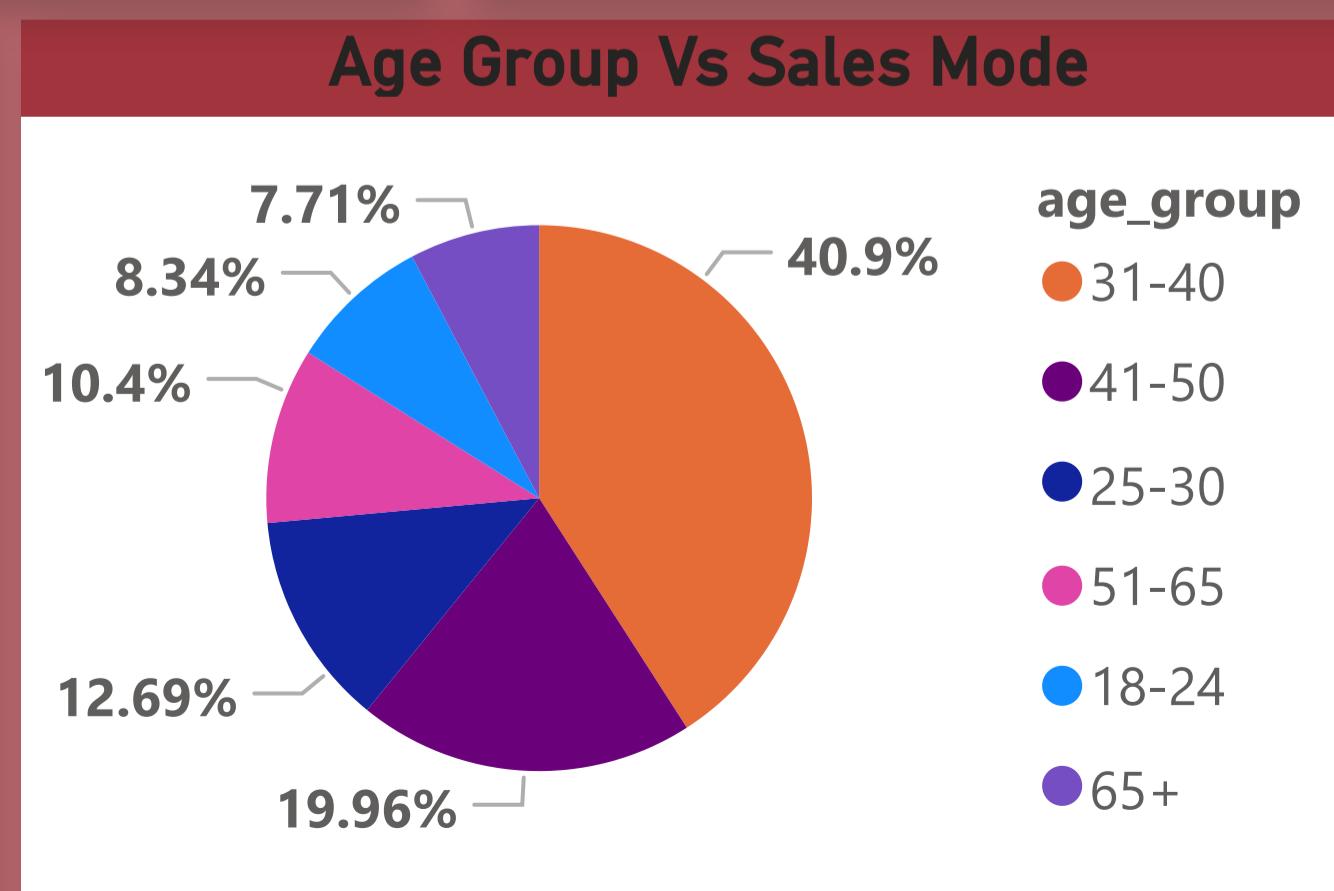
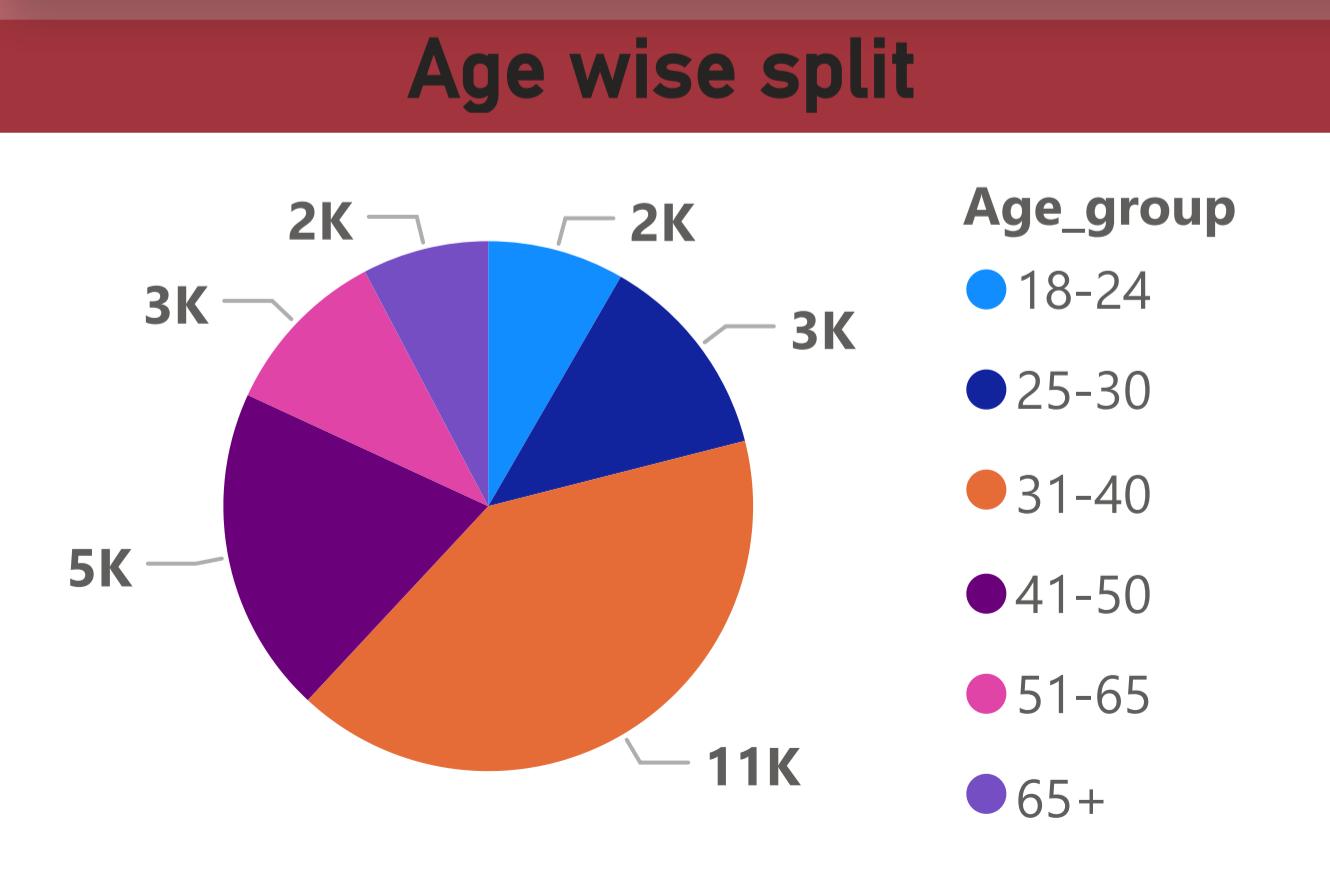
Overall view



Sales View



Age Group





Recommendation

- **Enhance Customer Engagement:** Engage customers through personalized communication, newsletters, and social media updates.
- **Referral Programs:** Incentivize customers to refer friends and family with rewards for successful referrals.
- **Customer Feedback:** Solicit and act on feedback to enhance services and resolve issues.
- **Loyalty Programs:** Reward repeat customers to incentivize continued choice of Shield Insurance.
- **Targeted Marketing:** Use data analytics to tailor campaigns to key demographics



Thank you

