# Shield Insurance

**Shield Insurance is a trusted provider of comprehensive insurance solutions, offering products tailored to the needs of individuals and businesses. Focused on customer satisfaction and financial security.**

**We prioritize transparency, efficiency, and customer-centric services, ensuring personalized care for every policyholder. Shield Insurance strives to lead the industry with adaptable coverage for our clients' evolving needs.**

**INSIGHTS**

**RECOMMENDATION**

**General View**

**Sales Mode Analysis**

**Age Group Analysis**

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**INSIGHTS**

**RECOMMENDATION**

**General View**

**Sales Mode Analysis**

**Age Group Analysis**

## Filters

**Month**

All

- [ ] Apr_23
- [ ] Dec_22
- [ ] Feb_23
- [ ] Jan_23
- [ ] Mar_23
- [ ] Nov_22

**Age Group**

All

**Sales Mode**

All

## Abbreviations

**LM = Last Month**

**Values are in Rupees & Millions**

### Total Revenue

# 989.25M

(Blank)

LM Total Revenue

### Total Customers

# 27K

(Blank)

LM Total Customers

### Daily Revenue Growth

# 5.47M

(Blank)

LM Daily Revenue Growth

### Daily Customers Growth

# 148

(Blank)

LM Daily Customers Growth

### Revenue Split

| city | Total Customers | Total Revenue |
|------|-----------------|---------------|
| Indore | 2,096 | 81.35M |
| Chennai | 2,966 | 106.31M |
| Hyderabad | 4,340 | 160.52M |
| Mumbai | 6,432 | 239.51M |
| Delhi NCR | 11,007 | 401.57M |
| **Total** | **26,841** | **989.25M** |

### Customer Split

| Age Group | Total Customers | Total Revenue |
|-----------|-----------------|---------------|
| 17-24 | 1,844 | 25.32M |
| 25-30 | 3,194 | 56.74M |
| 31-40 | 10,460 | 311.13M |
| 41-50 | 6,031 | 226.53M |
| 51-65 | 3,077 | 165.62M |
| 65+ | 2,235 | 203.92M |
| **Total** | **26,841** | **989.25M** |

### Trend by Month

● Total Revenue ● Total Customers

### Customer Segmentation

| city | Age Group | Total Revenue | Total Customers |
|------|-----------|---------------|-----------------|
| Chennai | 17-24 | 2.95M | 205 |
| Chennai | 25-30 | 6.25M | 386 |
| Chennai | 31-40 | 32.43M | 1,140 |
| Chennai | 41-50 | 25.42M | 672 |
| Chennai | 51-65 | 17.18M | 322 |
| Chennai | 65+ | 22.08M | 241 |
| Delhi NCR | 17-24 | 9.81M | 749 |
| Delhi NCR | 25-30 | 23.79M | 1,267 |
| Delhi NCR | 31-40 | 128.23M | 4,361 |
| **Total** | | **989.25M** | **26,841** |

# Age Group Analysis

## Filters

**Month**
All

**City**
All

**Policy_id**
All

**Age Group**
All

**Sales Mode**
All

## Policy Preference by Age Group

| policy_id | 17-24 | 25-30 | 31-40 | 41-50 | 51-65 | 65+ |
|---|---|---|---|---|---|---|
| POL1048HEL | 30 | 102 | 594 | 366 | 259 | 317 |
| POL2005HEL | 32 | 81 | 499 | 373 | 365 | 618 |
| POL3309HEL | 231 | 441 | 1836 | 858 | 318 | 145 |
| POL4321HEL | 847 | 1152 | 1526 | 561 | 235 | 113 |
| POL4331HEL | 379 | 630 | 1644 | 692 | 242 | 148 |
| POL5319HEL | 93 | 269 | 1414 | 949 | 425 | 179 |
| POL6093HEL | 74 | 185 | 966 | 724 | 369 | 225 |
| POL6303HEL | 94 | 224 | 1202 | 897 | 421 | 179 |
| POL9221HEL | 64 | 110 | 779 | 611 | 443 | 311 |

## Age Group vs Excepted Settlements

| Age Group | Expected Settlement |
|---|---|
| 17-24 | 38.73 |
| 25-30 | 45.68 |
| 31-40 | 53.53 |
| 41-50 | 60.79 |
| 51-65 | 65.35 |
| 65+ | 71.86 |
| **Total** | **60.70** |

## Age Group vs No of Customers
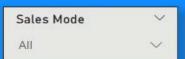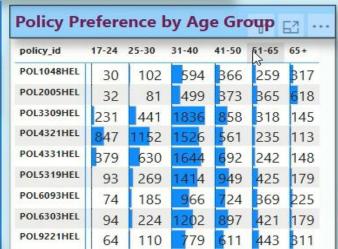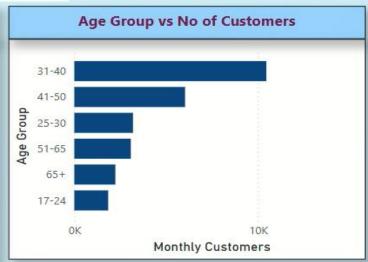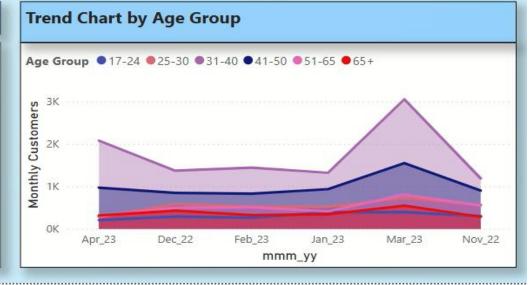


## Age Group vs Sales Mode

| sales_mode Age Group | Offline-Agent Total Customers. | Total Revenue. | Offline-Direct Total Customers. | Total Revenue. |
|---|---|---|---|---|
| 17-24 | 1063 | 15M | 321 | 4M |
| 25-30 | 1790 | 32M | 580 | 10M |
| 31-40 | 5647 | 169M | 1583 | 47M |
| 41-50 | 3405 | 128M | 927 | 33M |
| 51-65 | 1729 | 94M | 485 | 26M |
| 65+ | 1239 | 112M | 360 | 33M |
| **Total** | **14873** | **551M** | **4256** | **153M** |

## Trend Chart by Age Group

Age Group ● 17-24 ● 25-30 ● 31-40 ● 41-50 ● 51-65 ● 65+

## 📌 General view

· The company has a strong customer base of 26,841 individuals, reflecting solid market presence.

· Total revenue stands at ₹989.25 million, with March showing exceptional growth (+85% revenue, +82% customers).

· April, however, showed a steep drop in performance (−41.7% revenue, −41.4% customers), signaling areas needing attention.

## 🛍️ Sales Mode Analysis

· Offline Agent Channel dominates:

· 55.4% of customers, contributing 55.6% of revenue.

· Digital platforms (Online App & Web Portal) show even but smaller shares:

· Offline channel's effectiveness confirms customer trust in personal interaction.

## 👤 Age Group Analysis

· The 31–40 age group leads:

· 11,455 customers and ₹335.7M in revenue.

· This age group is also the main audience for top-performing policies.

· Strong engagement from this segment emphasizes its strategic importance.

## 📑 Top Policy Insights

· Most Popular: POL4321HEL (4,434 customers).

· Highest Revenue: POL2005HEL (₹324.3M).

· Both policies see major adoption from the 31–40 age segment.

# ✅ Recommendations

## 1. Strengthen Presence in High-Performing Regions

- Continue investing in Delhi, as it shows high customer and revenue contribution.
- Explore similar metro areas where similar strategies might replicate success.

## 2. Focus Marketing on 31–40 Age Group

- Since this group forms the largest customer and revenue segment, tailor policies, offers, and communication specifically for them.
- Consider age-personalized bundles or loyalty programs.

## 3. Enhance Digital Sales Channels

- While offline remains dominant, digital modes (App, Web) are underutilized.
- Boost digital adoption via:
- Referral bonuses for online sign-ups.
- Simplified digital onboarding and claim processing.

## 4. Address Performance Drop in April

- Investigate reasons behind the April revenue and customer drop.
- Consider time-bound campaigns or service quality audits for the period.

## 5. Promote High-Performing Policies

- Push POL2005HEL and POL4321HEL with targeted campaigns.
- Use success metrics of these policies to design new plans.