10Alytics
data & strategy

AUTOPLUS INSURANCE

DASHBOARDING CASE STUDY

About Us

AutoPlus Insurance is a leading insurance provider operating in multiple states in the United States.

At AutoPlus, we are committed to safeguarding your journeys and providing you with peace of mind on the road. With a relentless focus on customer satisfaction and a deep understanding of your unique needs, we strive to be your trusted partner in navigating life's uncertainties.

Our vision is to redefine the insurance experience by putting you at the center of everything we do. We believe that insurance is not just about policies; it's about building relationships and providing comprehensive protection that goes beyond expectations.

Problem Statement

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The company aims to improve customer satisfaction and retention by understanding customer behavior and preferences better.

You have been tasked with analyzing the provided dataset to create an interactive Excel dashboard that provides valuable insights into customer demographics, policy information, and customer interactions.

The dashboard should enable the company to make data-driven decisions and implement strategies to enhance customer experience and increase policy renewals.

Data Dictionary

The dataset contains information on customers, including their demographics, policy details, response to offers, and claim history. The fields in the dataset are as follows:

- Customer: Unique customer identifier

- State: State where the customer resides

- Customer Lifetime Value: Predicted lifetime value of the customer

- Response: Whether the customer responded to an offer (Yes/No)

- Coverage: Type of insurance coverage (Basic, Extended, Premium)

- Education: Customer's education level (Bachelor, College, High School or Below, Master)

- Effective To Date: Date when the customer's policy became effective

- EmploymentStatus: Employment status of the customer (Employed, Unemployed, Medical Leave, Disabled)

- Gender: Gender of the customer (F/M)

- Income: Customer's annual income

- Location Code: Code indicating the location of the customer (Urban, Suburban, Rural)

- Marital Status: Customer's marital status (Single, Married, Divorced)

Data Dictionary

- Monthly Premium Auto: Customer's monthly premium amount for auto insurance

- Months Since Last Claim: Number of months since the last claim made by the customer

- Months Since Policy Inception: Number of months since the policy was initiated

- Number of Open Complaints: Number of open complaints filed by the customer

- Number of Policies: Number of insurance policies held by the customer

- Policy Type: Type of insurance policy (Personal Auto, Corporate Auto, Special Auto)

- Policy: Policy level (Personal L1/L2/L3, Corporate L1/L2/L3, Special L1/L2/L3)

- Renew Offer Type: Type of renewal offer received by the customer (Offer1, Offer2, Offer3, Offer4)

- Sales Channel: Channel through which the policy was sold (Agent, Call Center, Web, Branch)

- Total Claim Amount: Total amount claimed by the customer

- Vehicle Class: Type of vehicle insured (Two-Door Car, Four-Door Car, SUV, Special Car)

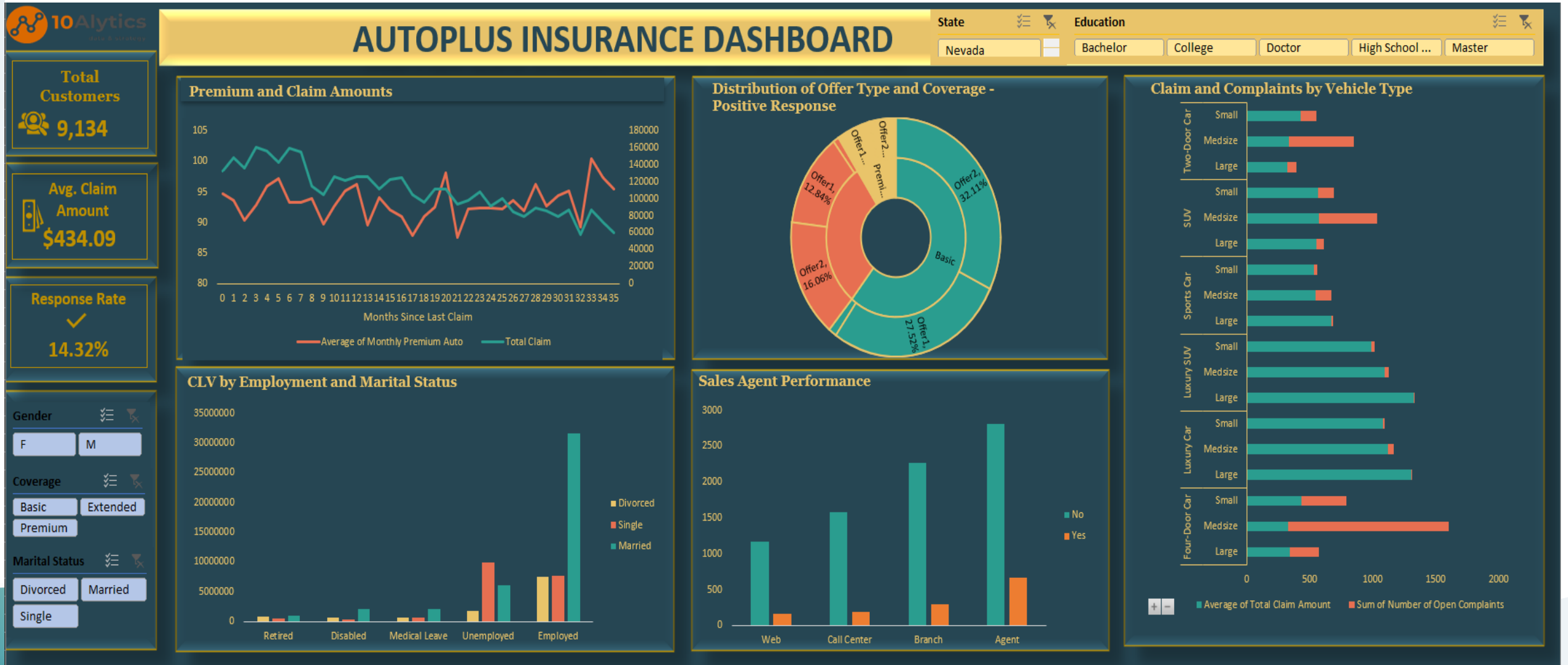- Vehicle Size: Size of the vehicle (Small, Medsize, Large)

Dataset Source:
https://www.kaggle.com/datasets/ranja7/vehicle-insurance-customer-data

Tailored Analysis

01 / **Track the trend of Monthly Premiums paid and Claims made for customers based on their last claim period.**

02 / **What is the distribution of Renew Offer Types within each Coverage category?**

03 / **Compare claim amounts and complaint frequency for different Vehicle Sizes by Vehicle Class.**

04 / **Analyze Customer Lifetime Value (CLV) for employment and marital status segments and identify potential high value customers?**

05 / **Which education levels and gender groups are more likely to respond positively or negatively?**

06 / **How effective are our sales channels?**

Final Dashboard

Color Palette: https://coolors.co/palette/264653-2a9d8f-e9c46a-f4a261-e76f51