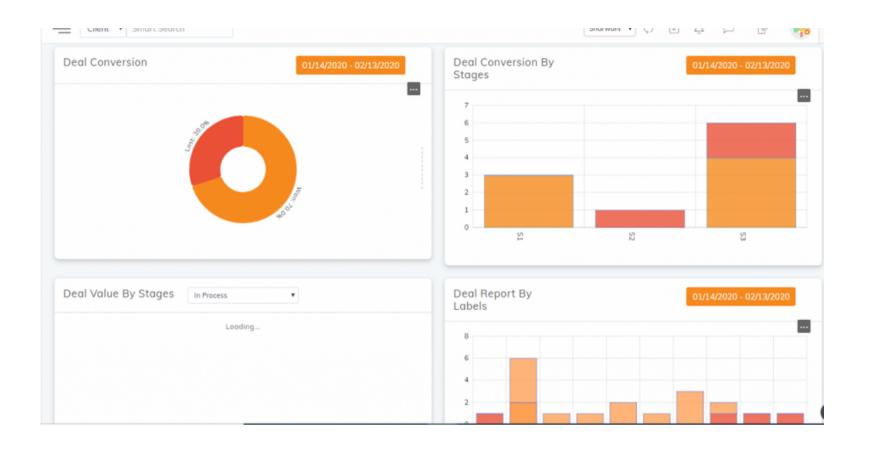
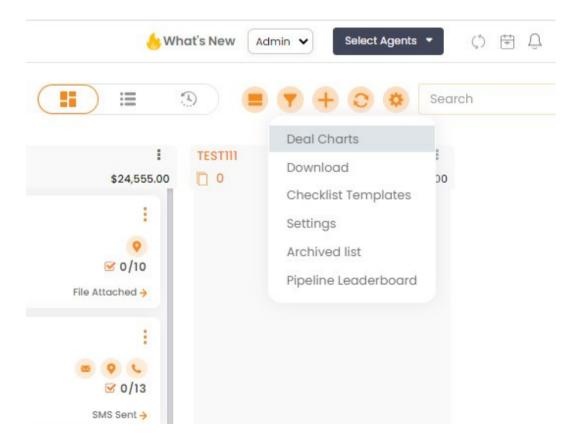
WITH A MANDA RICHARDS WEDNESDAY NOVEMBER 11, 2020

Daily Bite Size Training

Topic: Deal Value by Stages





Deal Charts

Get real analytics on your business in a visibly friendly way

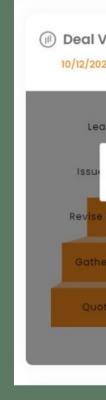
1. From the Deal board, you can click on the gear icon to get a drop-down menu 2. Click on Deal Charts and you will see all of the Deal charts

Deal Value by Stage

Funnel chart reflecting at which stage most of your value is stuck.

Stages are in an ascending manner

Learn which stage needs more as they are stuck at the bottom of the pyramid





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(1) See your outlook of potential premium by Deal Board stage Quote: 28.7%		
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Value By Stages 🥫	In Process	~
020 - 11/11/2020	All	
ad In: 2.3%	Won Lost In Process	_
e Policy: 5.1%		
e Quote: 28.7%		
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oting: 32.5%		

THANK YOU!

To learn more please visit <u>Knowledge base</u>

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