Daily Bite Size Training

WITH AMANDA RICHARDS
MONDAY OCTOBER 19, 2020

Topic:
How to use Pipeline Manager
5 important data points in a deal card

Topics/questions from zoom call

PIPELINE MANAGER

Question 1

Answer:

Question 2

Answer:

Question 3

Answer:

Topics/questions from zoom call

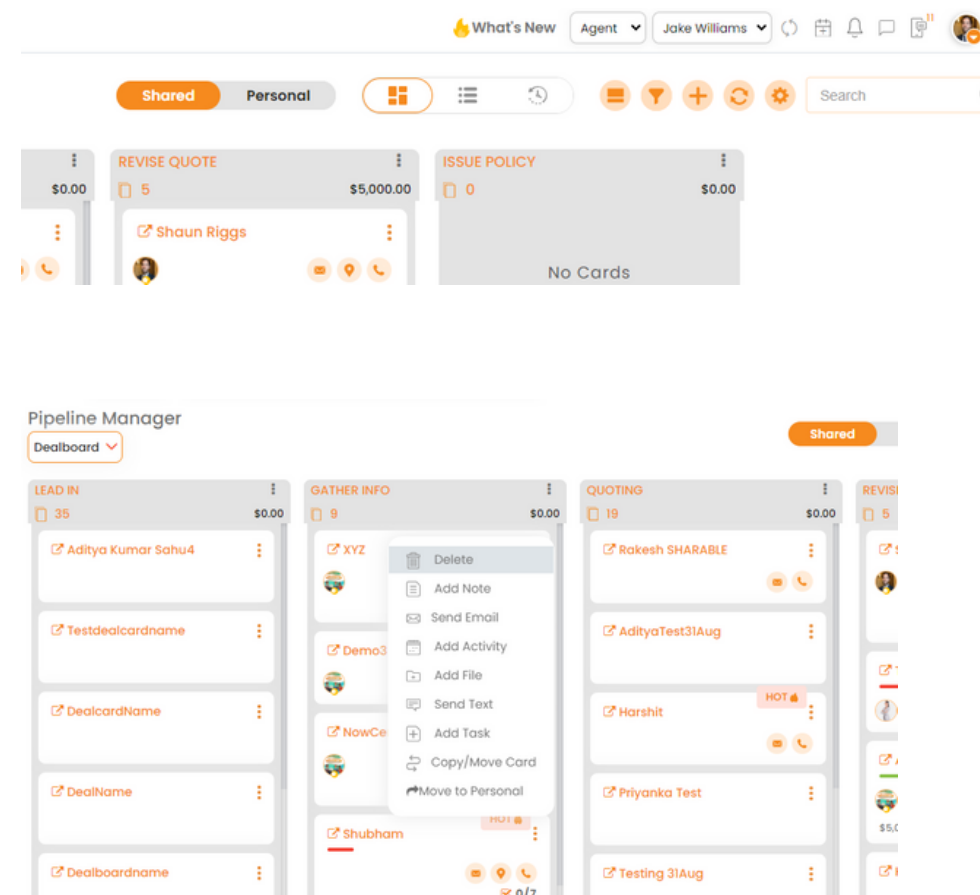**5 DATA POINTS IN DEAL CARD**

Question 1

Answer:

Question 2

Answer:

Question 3

Answer:

PIPELINE MANAGER

How to use?

1. Navigate to Pipeline Manager
2. Chose the deal card you wish to switch from shared to personal
3. Click the 3 dots on the card
4. Select Move to personal

Shared Pipeline

Why does this matter?

Initiates collaboration

Brings visibility to the deal flow

Shows new leads that have come in but haven't been assigned
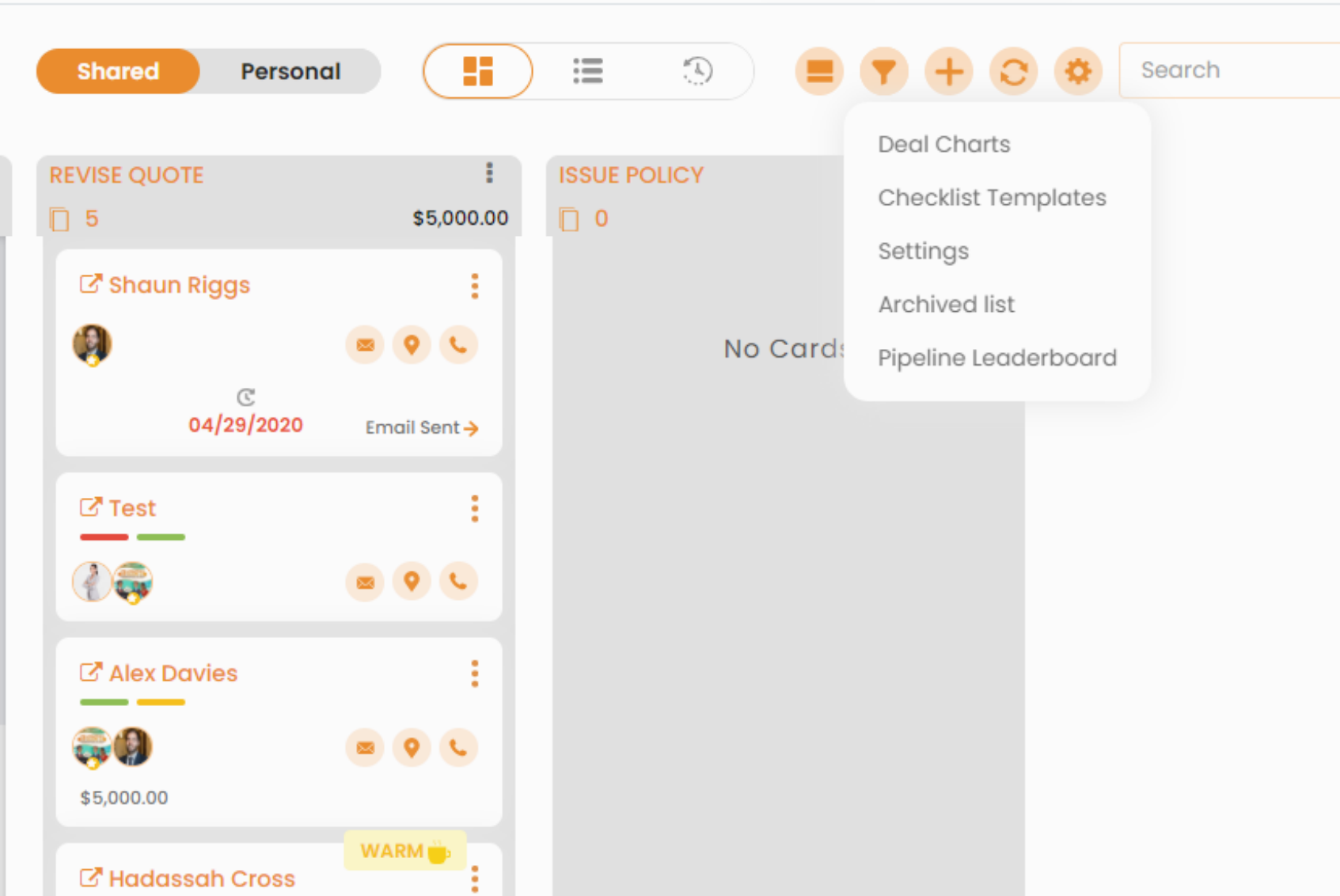
Click here to learn more:
Shared Pipeline.

Deal Forecast

Anticipate demand with increased efficiency

Click here to learn more:
Deal Forecast

Navigate to Pipeline Manager
Click on the Forecast icon
The month view of the deal cards is displayed
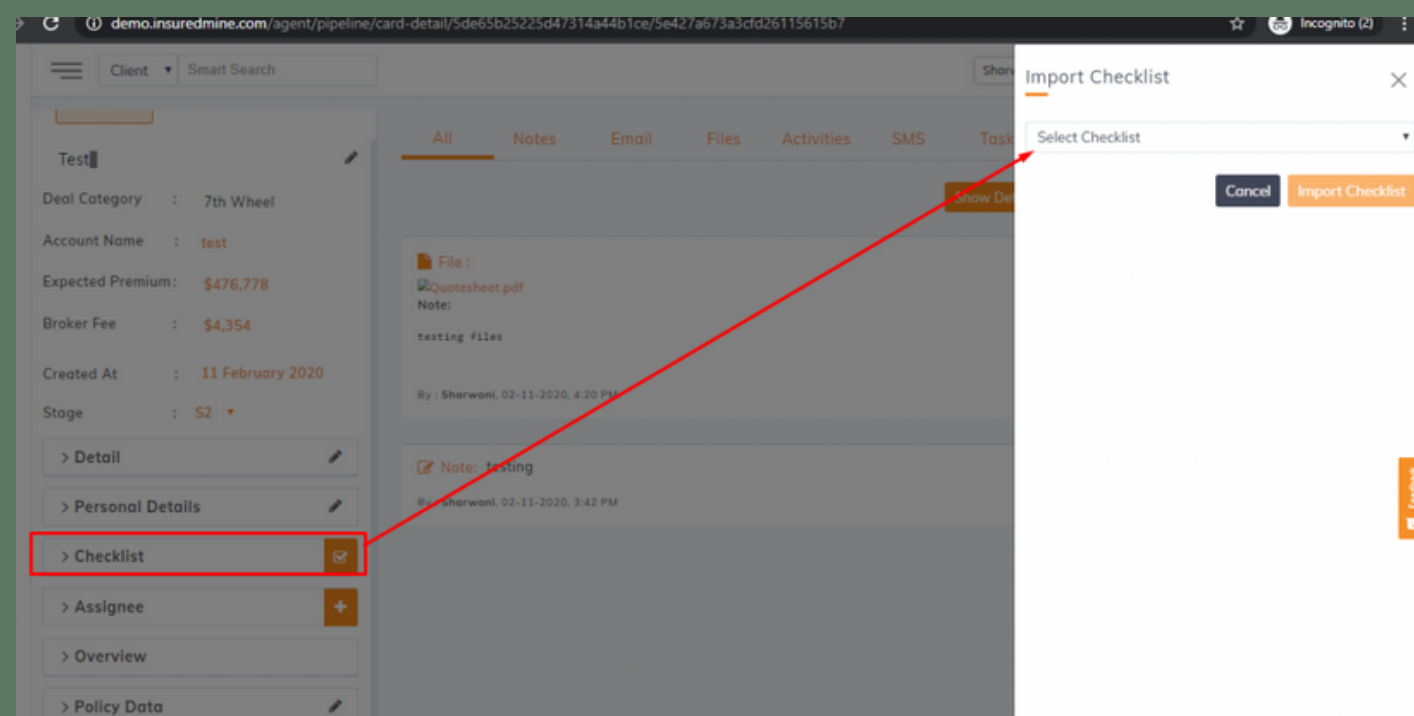
Checklist

Help you view the processes without wasting the team's time & ensuring efficient practices
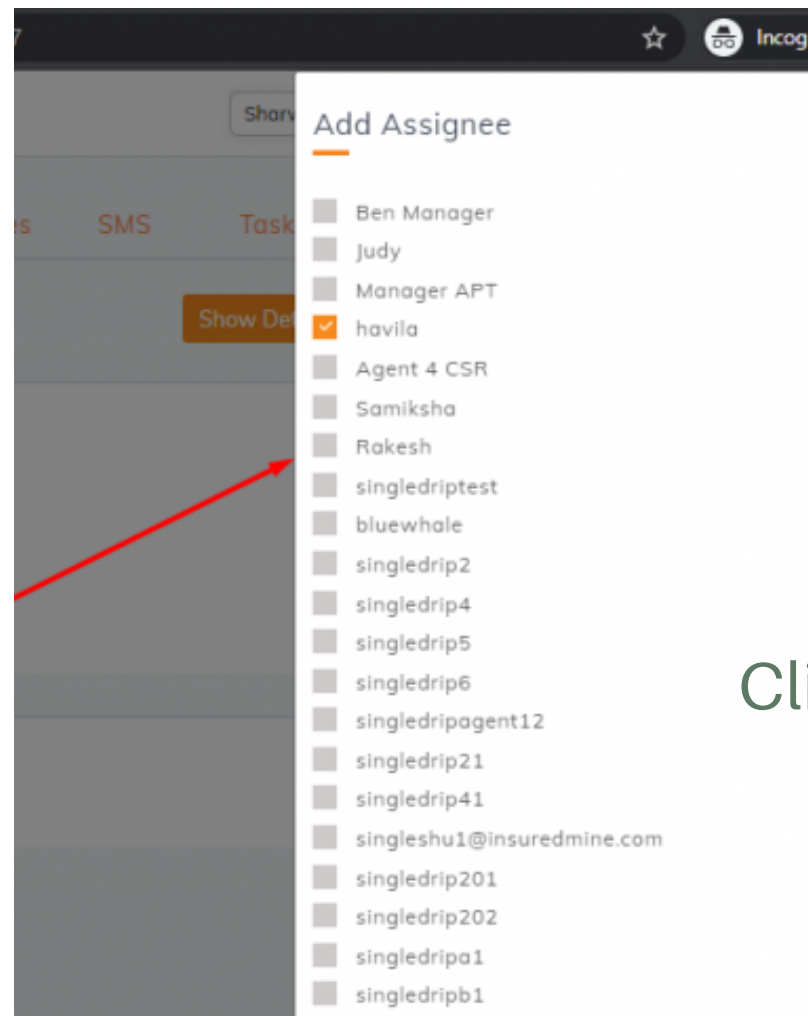
How to use?
1. Navigate to Pipeline Manager
2. Click on the gear icon
3. Select Checklist templates

From Inside the deal card
1. Click on the deal card you wish to add a checklist too
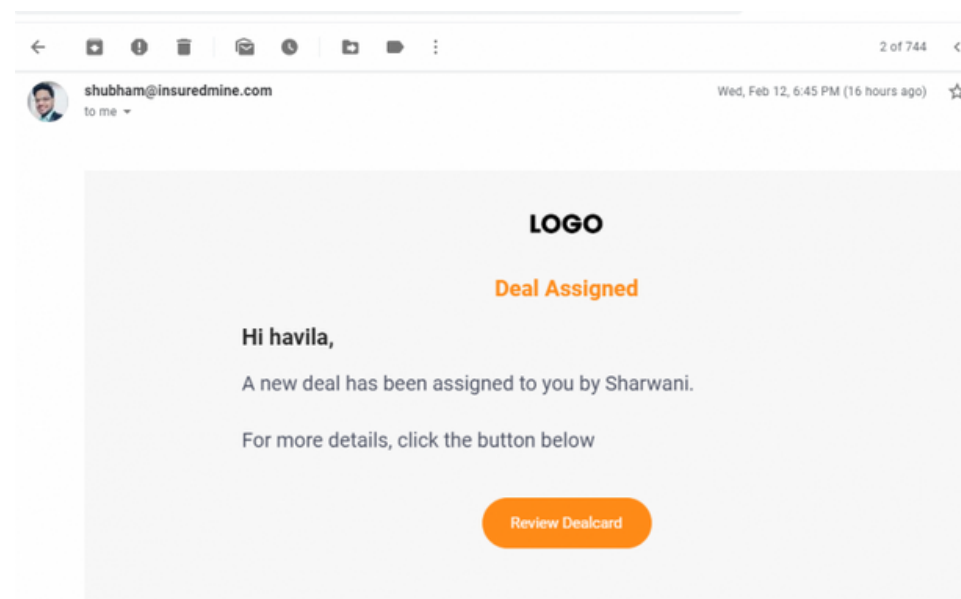2. From the popup screen, you can select the checklist template you want to use.

Click here to learn more:
Checklist

HOW TO USE?

From your deal board, select the deal card you want to add an agent

Click on Assignee **+** to get a pop up screen to add an agent

NOTIFICATION TO ASSIGNEE

When you assign an agent to a deal, An email alert goes to the assignee to let them know.

ASSIGNEE

This helps to increase the visibility of the deal across the organization

Click here to learn more:
Assignee

5 IMPORTANT DATA POINTS IN A DEAL CARD

Deal Effort Overview

TO SEE HOW MUCH WORK AND EFFORT IT TAKES YOU TO CLOSE DEALS

1. Click on the deal card you want
2. From the list, you can see a summary of the activities for this deal card
3. Click on the down arrow next to Overview
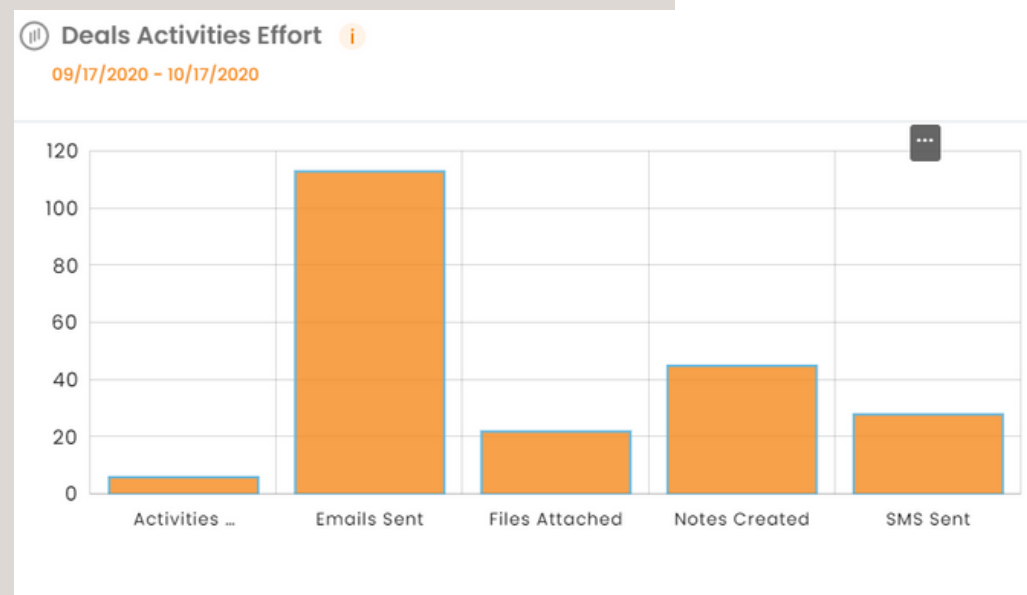
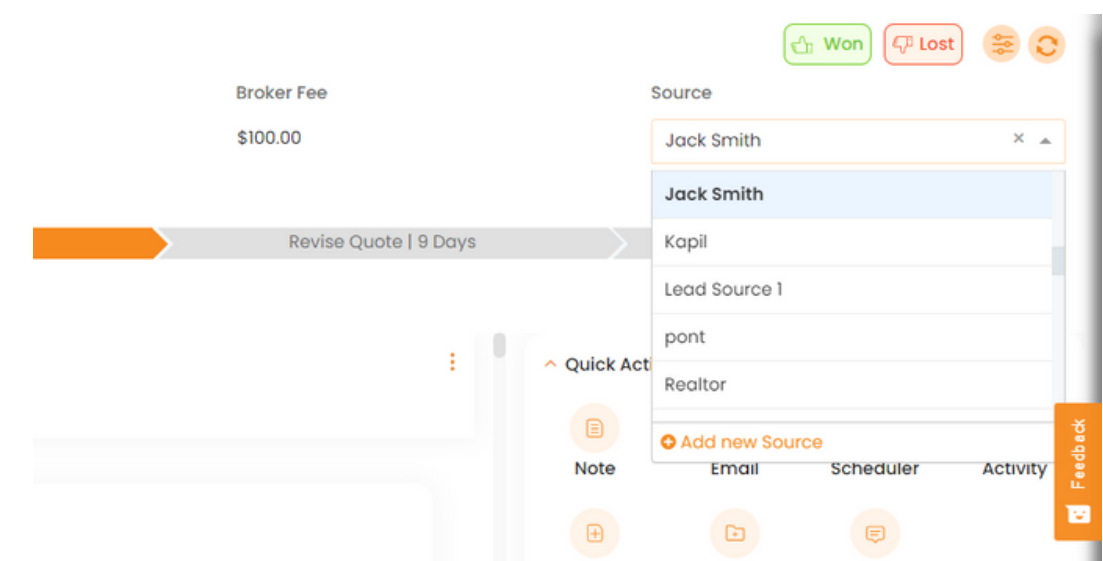

Click here to learn more:
Overview

Lead Source

Reveals which lead generation channels produced the highest number of new leads.
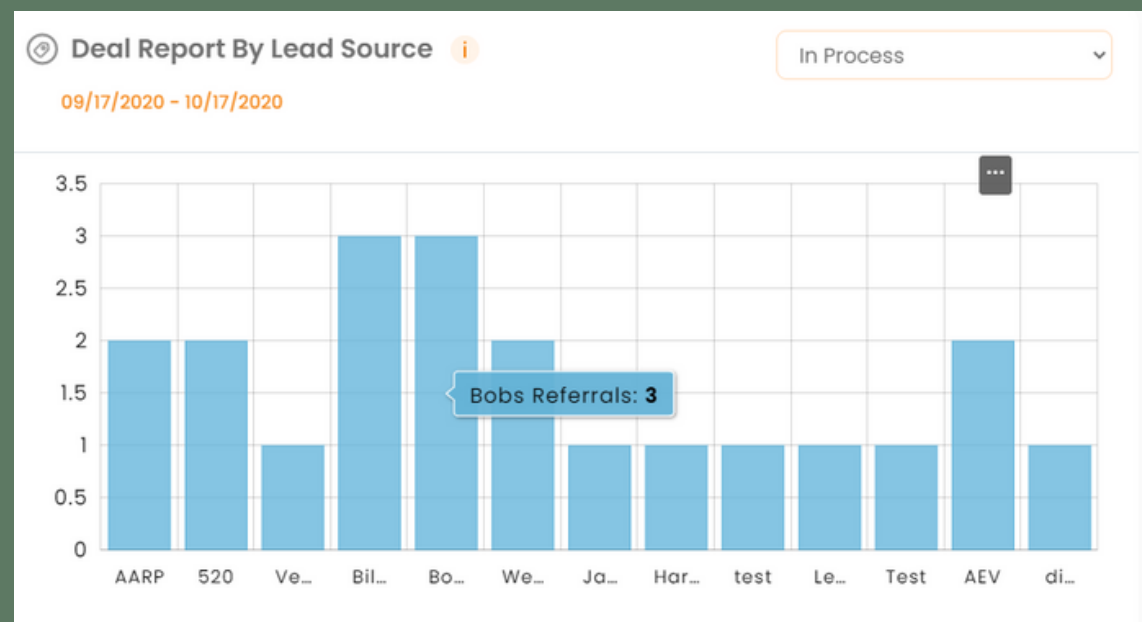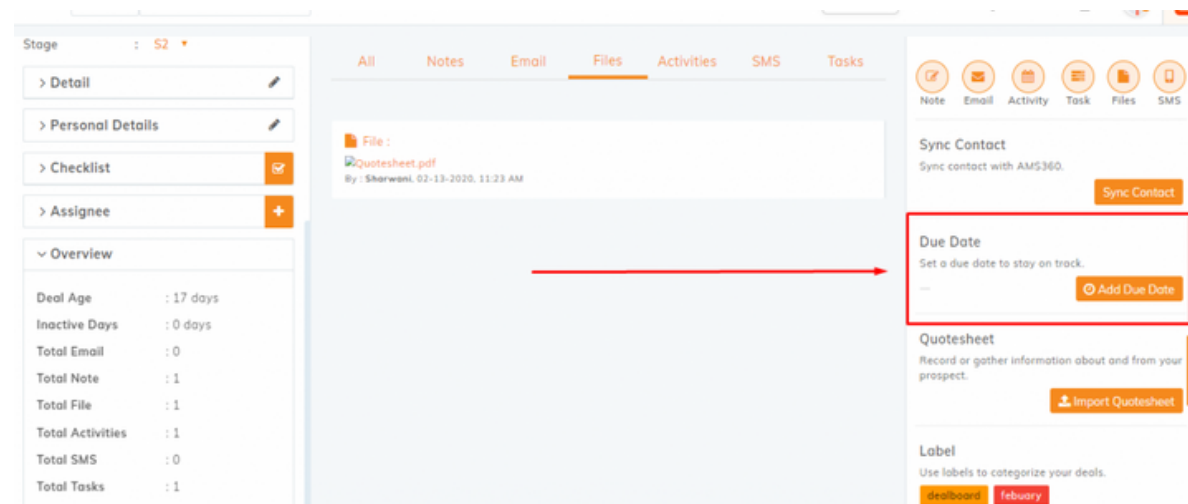

Click here to learn more:

Lead Source

How to use?

> Go to contacts & click Add new

> On the Add New Contacts screen, scroll down to find lead source filed

> Click on add a new source

> Enter a source name, email address, & phone number. Click Submit.

Due Date

So it doesn't get forgotten and you can follow up in a timely manner

Click here to learn more:
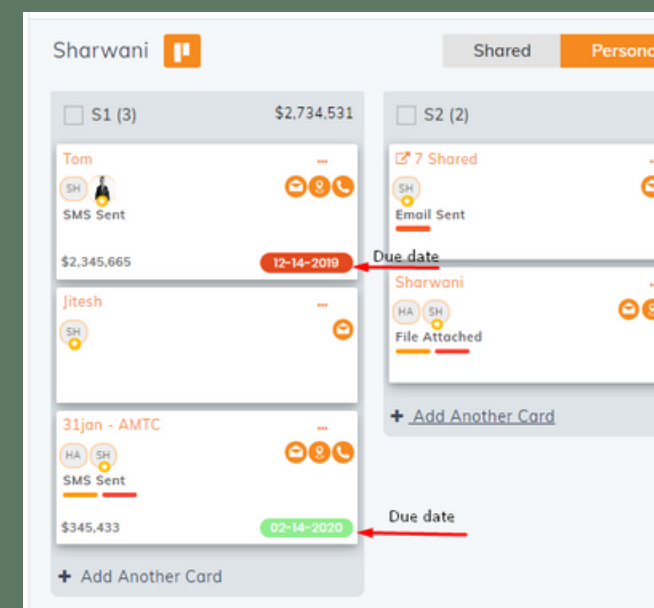
Due Date

HOW TO ADD A DUE DATE?

From your Dealboard, click on the dealcard to open it.

You will see a Due Date section on the right. Just click on "Add Due Date".

COLOR OF DUE DATE

Due date will change colors based when the card is due:

Red - past due

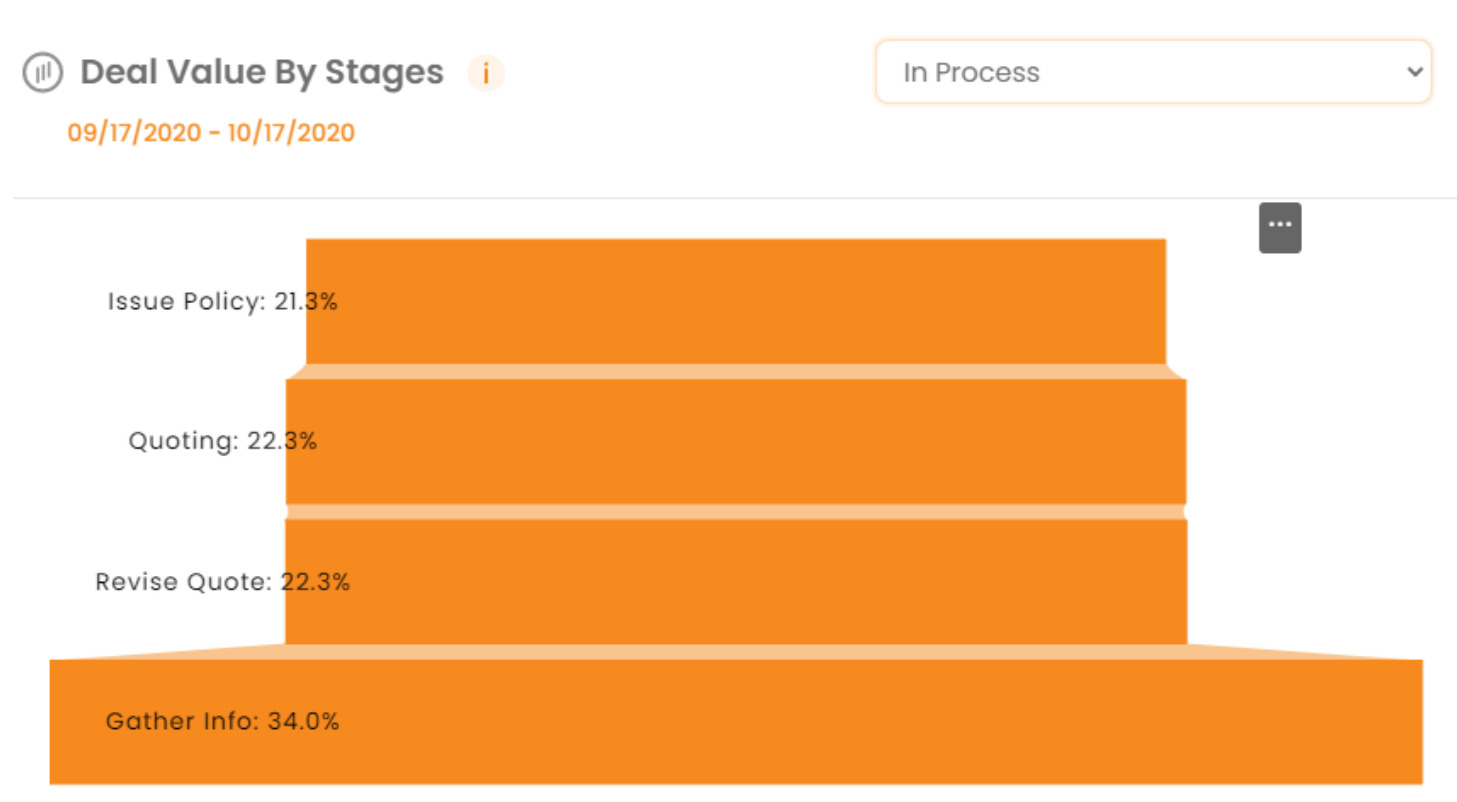*Yellow - due within 24 hours*

Green - completed

Expected Premium

SEE YOUR OUTLOOK OF POTENTIAL PREMIUM BY DEAL BOARD STAGE

Deal Value By Stages ⓘ

09/17/2020 - 10/17/2020

In Process

Issue Policy: 21.3%

Quoting: 22.3%

Revise Quote: 22.3%

Gather Info: 34.0%

Why is this data useful?

This is a funnel chart reflecting at which stage most of your value is stuck

It will help you learn which stage needs more work than others as they are stuck at the bottom of

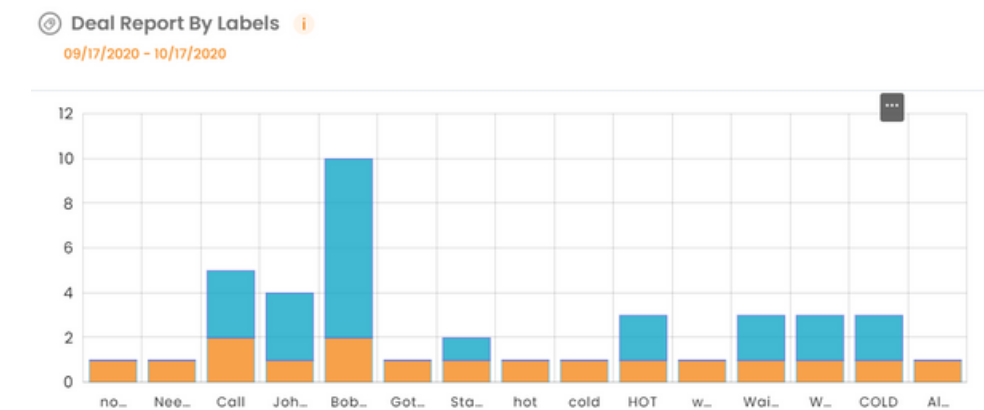*Click here to learn more:*

Funnel Graph

HOW TO ADD A LABEL?

- Open a dealcard & select Add Label
- A drop-down menu of all of the current labels will appear
- You can add multiple labels to one deal card, or you can create new labels
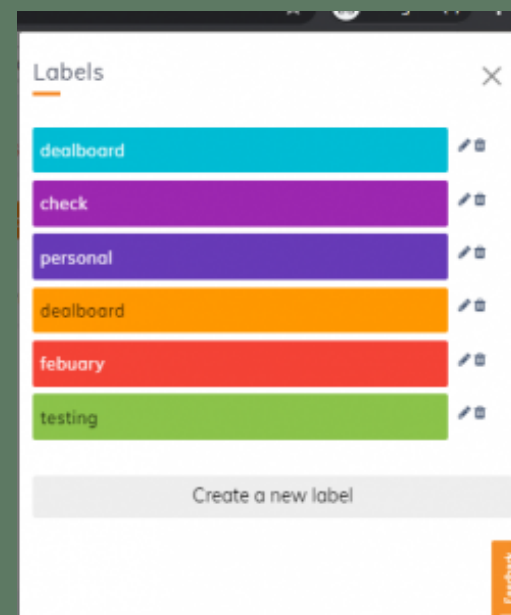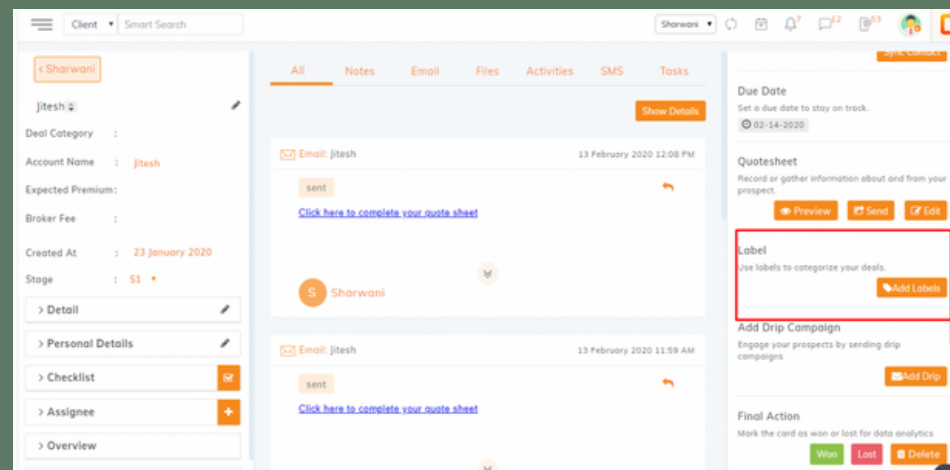
Labels

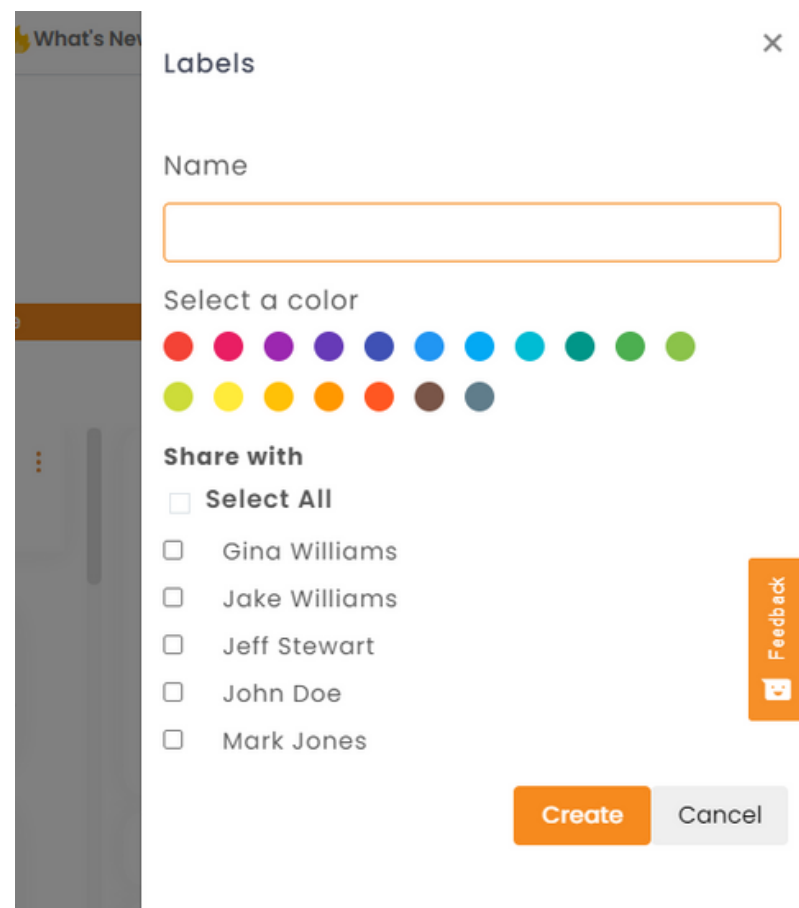Analyze where and when you win & where and when you lose.

For example, you may want to create labels for your various referral channels in order to track which leads are most beneficial..

Click here to learn more:

Labels

Share Label

Sharing labels helps to easily track deals and enables maintaining regularity in the system.

How to share a label in pipeline manager?

1. In the Pipeline Manager, expand the deal card you want to work on.
2. Click the Add label under Label field to the right.
3. Click create a new label or edit(pen) icon of the existing label.
4. Under Share With segment, mark the agent names to share labels or click select all.
5. Click Create or Update based on the option chosen in step 3.

Click here to learn more:

Share Label

THANK YOU!

To learn more please visit:
Knowledge base
Email: support@insuredmine.com
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