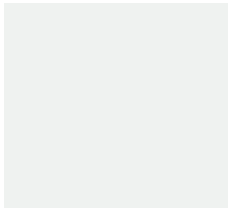


WITH AMANDA RICHARDS
WEDNESDAY OCTOBER 21, 2020

Daily Bite Size Training

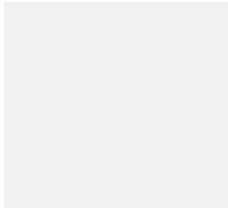
Topic: 4 KPIs to follow

Topics/questions from zoom call



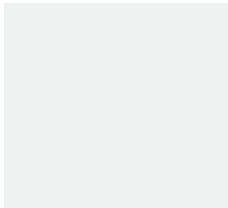
Question:

Answer:



Question:

Answer:



Question:

Answer:

4 KPIs



4 KPIs

The 4 KPIs

Where are they located?

Go to the Dashboard module

At the top of the page there are the 4 KPIs
You can click the number for an expanded view

1. ACTIVE CLIENT
2. CARRIER
3. POLICIES
4. ANNUALIZED PREMIUM

Data Updated: 07/26/2020

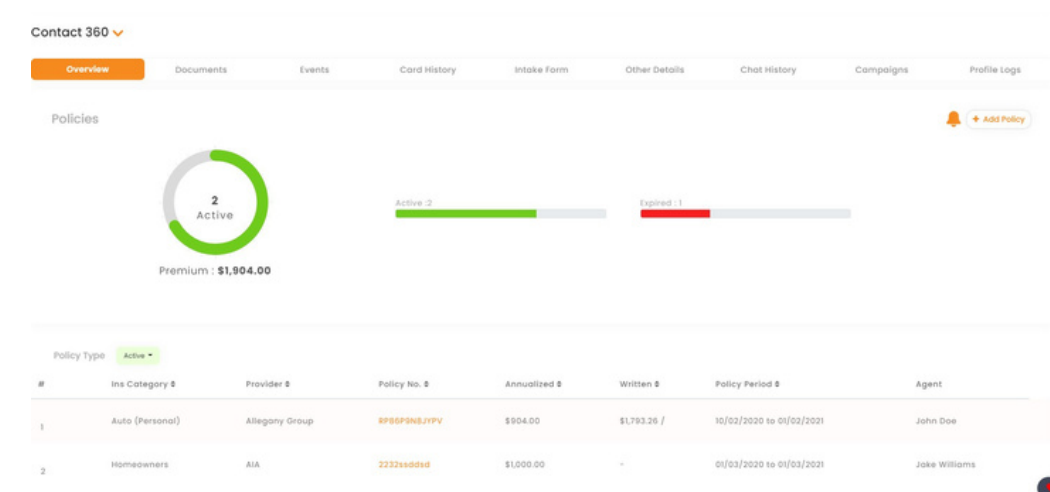
Task	Contact	Date Created	Due Date	Priority	Assignee	Assigned By	Status	Action
Homeowners - Shubam	Fallon Carrinaton	10/15/2020		High	John Doe	John Doe	Pending	

*Click here to learn more:
[KPIs](#)*

What is included?

- Policy Info
- Documents
 - Email
 - Received records
 - Notes
 - Files
- Events
- Deal/card history
- Chat history
- Campaigns & Referrals.

#	User	Account Name	Primary Contact	Premium	Policies	City	Agent	Action
1	Agustin Cooper	Agustin Cooper	Agustin Cooper	\$1,055.00	1	CHESTER SPRINGS	Jeff Stewart	Send Text Chat Send Email
2	Alex Davies	Alex Tron	Alex Tron	\$121.45	1	COLLEGEVILLE	John Doe	
3	Alexandra Potts	Alexandra Potts	Alexandra Potts	\$1,904.00	2	Bedford	John Doe	
4	Angelita Gibson	Angelita Gibson	Angelita Gibson	\$535.00	1	WEST CHESTER	Jeff Stewart	
5	Bradford Lara	Bradford Lara	Bradford Lara	\$923.00	1	MALVERN	Jeff Stewart	
6	Concetta Miranda	Concetta Miranda	Concetta Miranda	\$1,763.00	2	COLLEGEVILLE	Jeff Stewart	



Active Clients

List of all active accounts as individuals or businesses who have purchased policies through your agency.

Clicking on the count opens the list of all active accounts & each account provides a 360 view (overview) of policyholder

Carriers

All carriers who has written policies directly or through subsidiaries within a local region.

Sorted by

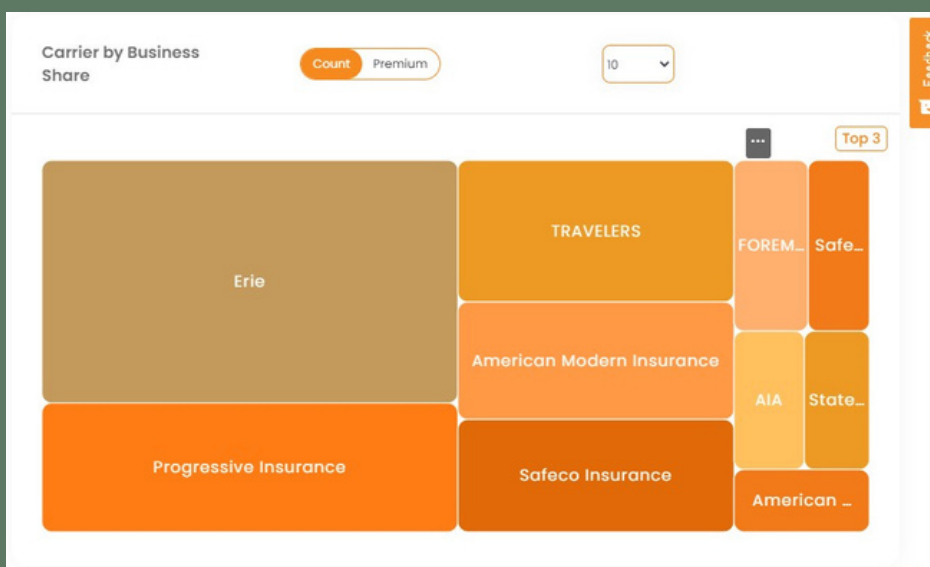
- Carrier name
- Total policy count
- Premium volume

To add a contact at a carrier

1. Click on the Carrier name
2. Under Carrier Contacts, on the right-hand side, click the “+” button
3. Fill in the required fields and click save.

#	Carrier	Policies	Premium	Action
1	ACE	5	\$680,998.00	
2	AIG - American International Group, Inc.	15	\$8,355.53	
3	ALLIED PROP & CAS INS CO	1	\$1,110.00	

#	Carrier Name	Policies	Premium
1	AIA	53	\$714,653.53
2	AMERICAN ECONOMY INS CO	7	\$20,015.00
3	AMERICAN RISK INS CO INC	10	\$13,217.32
4	ASI (AMERICAN STRATEGIC INS)	5	\$11,898.00
5	Allegany Group	1	\$904.00
6	Allied	10	\$11,335.24
7	Allstate	9	\$6,552.36
8	American Bankers Ins Co of FL	1	\$3,399.67



Click here to learn more:
[Carriers](#)

Policies

Count of policies is a good reflection of business health and growth

When users complete their profiles on the app you will see:

- Details about the policies
- Policies users has added from other sources

Policies

Policies: 2080 Premium: \$2,865,453.64

Active X dates

#	Policy No.	Account Name	Contact Name	Category	Carrier	Premium	Effective Date	Expiration Date
1	017WNYF87	Jordan Hogan	Jordan Hogan	Auto (Personal),boat,bop Liability	Erie	\$1,829.00	01/04/2020	01/04/2021
2	01AQVPU2	Kenna Clay	Kenna Clay	Auto (Personal)	Travelers	\$2,349.00	06/15/2019	12/06/2020
3	01GZXVUNQ3Y1	Marty Gomez	Marty Gomez	Homeowners	American Modern Property & Casualty Ins Co	\$491.00	06/01/2020	06/01/2021
4	01J5HQ5J0VNA	Roslyn Hammond	Roslyn Hammond	Auto (Personal)	National General Ins Co.	\$318.00	03/26/2020	03/26/2021
5	027ZQQZ0QTP	Morgan Welch	Morgan Welch	Business Owners Policy	Erie	\$811.00	02/18/2020	11/18/2020
6	02XX9BIUD6JO	Raymon Rowland	Raymon Rowland	Homeowners	American Modern Insurance	\$504.00	01/31/2020	10/31/2020

Policies > 017WNYF87

Policy status: Active Show Logs Cancel Policy

Policy Details

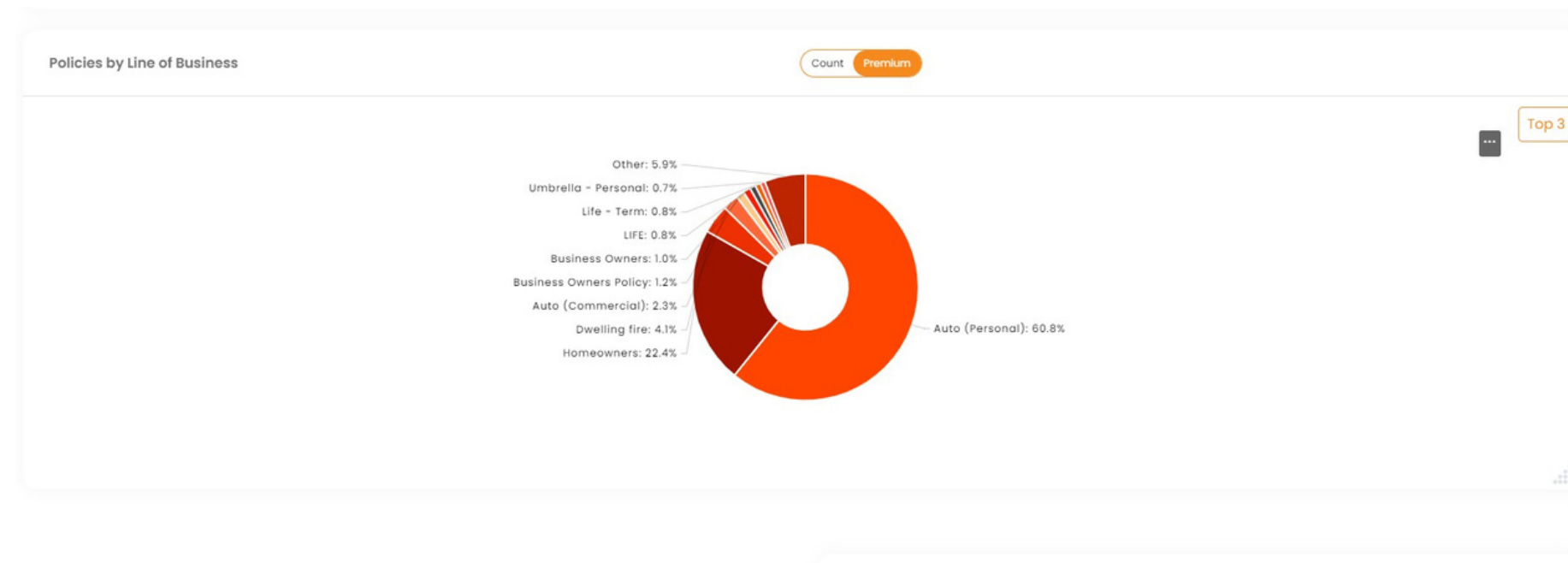
Insurance Type:	Commercial
Insurance Category:	Auto (Personal),BOAT,BOP Liability
Policy Number:	017WNYF87
Payment Frequency:	12 Months Month
Effective Date:	01/04/2020
Expiration Date:	01/04/2021
Notes:	test notes asd asdad asd adas dad
Insured Name:	Jordan Hogan
Agent:	John Doe

- ^ Premium Details
- ^ Insurance Carrier and Agency Details
- ^ Vehicle Details + Add New
- ^ Driver Details + Add New
- ^ Coverage & Limits of Liability + Add New
- ^ Policy Documents + Add New
- ^ Policy Cards + Add New

Click here to learn more:
[Policy Count](#)

Annualized Premium

CALCULATED BASED ON 365 DAYS IN A YEAR BEGINNING ON THE INITIAL DATE OF THE POLICY.



THANK YOU!

To learn more please visit:

[Knowledge base](#)

Email: support@insuredmine.com

CALL: +14696161821

FOLLOW US!

