WHICH STATS YOUR AGENCY SHOULD BE PAYING ATTENTION TO

Real-Time Insurance Agency Analytics Can...

1. Provide early detection of opportunities and issues.
2. Identify hidden revenue opportunities within your customer base.
3. Leverage specialized methods and tools to generate intelligent insights that drive business innovation.[1]

ANALYTICAL INSIGHTS

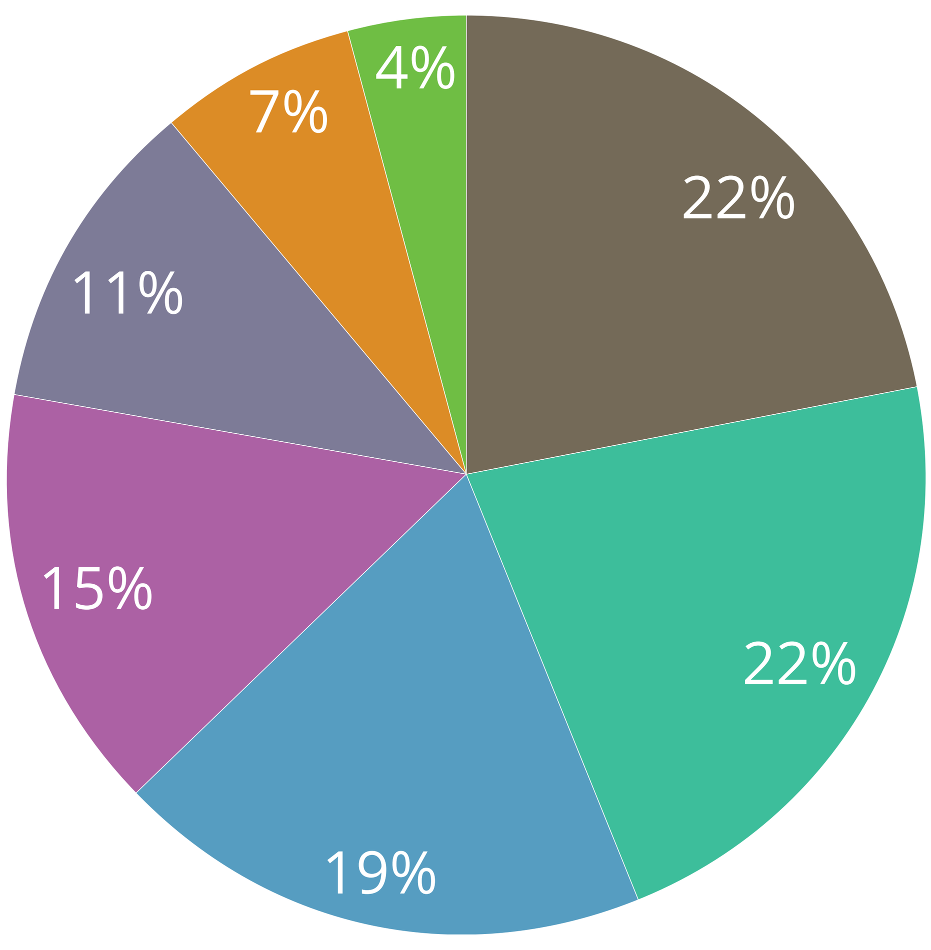
IN 2015...

AgencyBloc launched **Dashboard Analytics** a tool to help agents, agency owners, and staff members visualize their existing data in a way that facilitates smarter business decisions.

IN 2016...

AgencyBloc launched **Personal Dashboards** a tool to help agents, agency owners, and staff members specify which analytics were most important for them to see on a daily basis by "starring" them.

MOST STARRED ANALYTICS. These are the types of graphs and charts our clients have "starred" most within AgencyBloc's system.



- Commissions How much are you receiving, is it right, and who's outperforming the rest
- Policies See how many policies you have, in-force saturation, how many are new, etc.
- Activities What are your to-dos, who do you need call/follow-up with, what needs done
- Carriers What are your top products and what's the break down of policy by carrier
- Groups How many are active vs. not and which stage are they in (enrolled, quoted, etc.)
- Lead Source Where are your best lead sources coming
- Search In-depth look into who your clients are, what is working, and where to go next

6%
of insurance CEOs report that they are prepared for the growing complexity ahead[2]

83%
of respondents noted that they'd find business analytics moderately to extremely beneficial[3]

85%
of organizations will fail to address data complexity and volume in their analytics[4]

IN-DEPTH SEARCHES

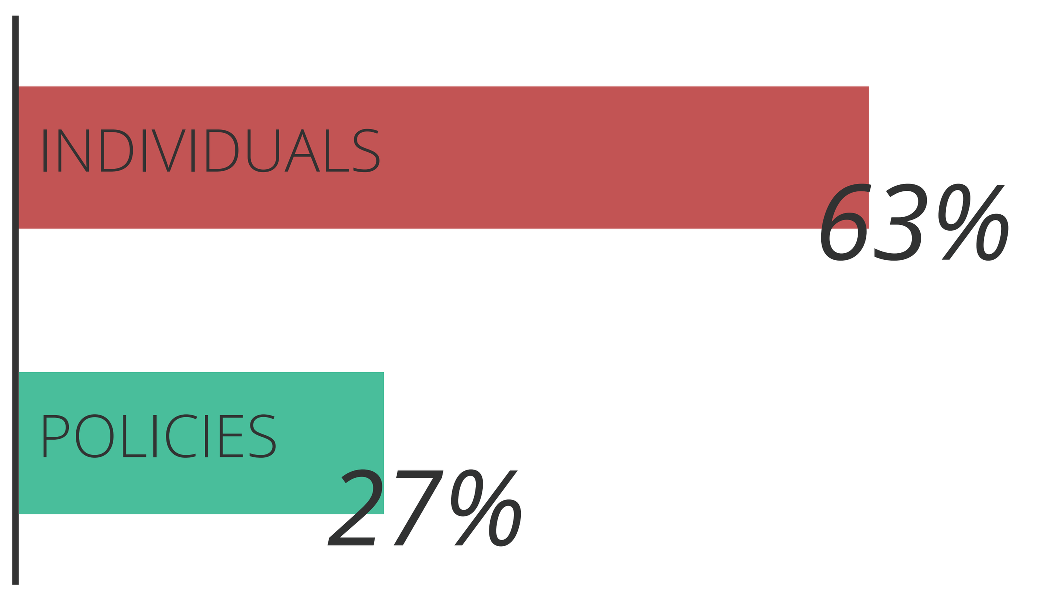
IN 2016...

AgencyBloc launched **Advanced Search** a tool to help agents, agency owners, and staff members segment their data. This allows them to focus in on target information so they are able to better understand their clients, their groups, and the information they have in their book of business.

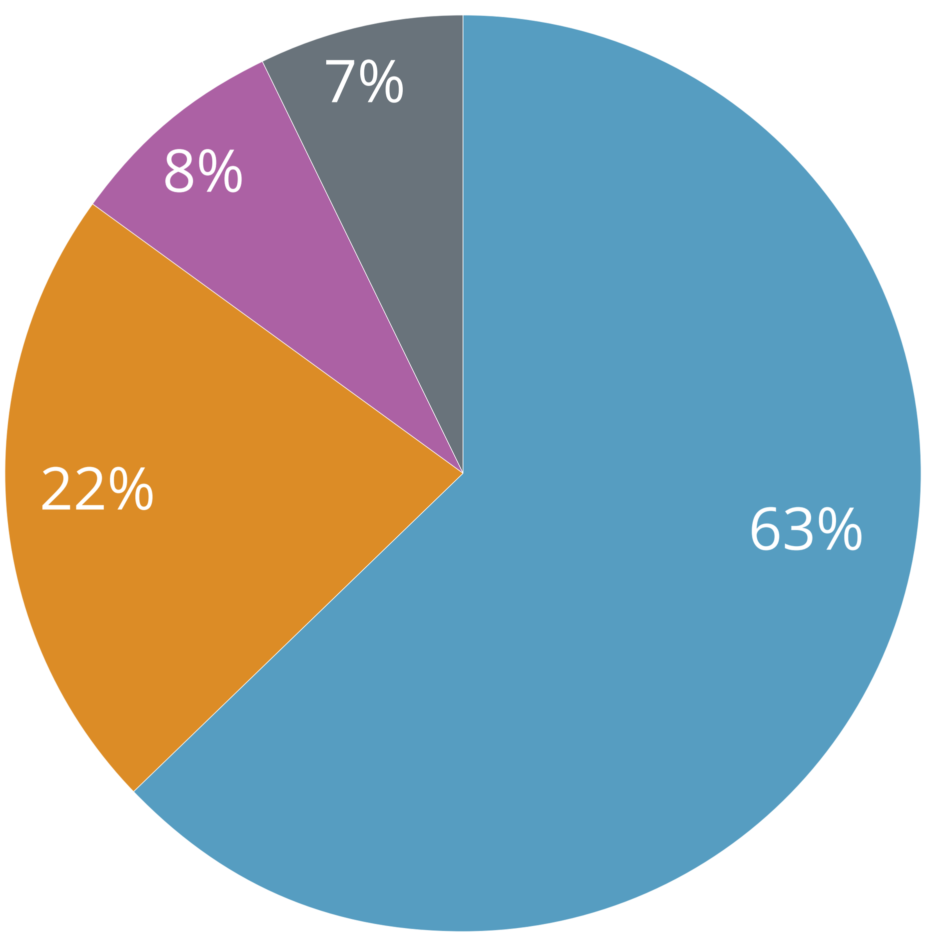
Individual-Based Searches give you insight to your client pool with information like how many prospects you have or how many clients one agent has. You can also use it to look up phone numbers, addresses, and other information about your clients.

Policy-Based Searches help you segment your data by letting you search for information like how many policies you have with a specific carrier, how many in-force policies you have, and how many pending policies you have. You can also use it for cross-selling purposes.

MOST POPULAR ADVANCED SEARCHES



You can set parameters (or criteria) for your searches so you only see what you need to see. Searches can have one criteria like contact's phone number, agent's ID number, or policy status (pending, lapsed, active, declined, etc.). They can also have multiple criteria like individuals with both dental and health policies.



NUMBER OF SEARCH CRITERIA

- 1 Criteria
- 2 Criteria
- 3 Criteria
- 4+ Criteria

TOP SINGLE SEARCH CRITERIA

- Contact's Phone Number
- Policies with Carrier
- Contact's Status
- Policy's Status
- Agent's ID Number
- Contact's Date of Birth
- Policy's Agent
- Contact's State of Residence

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Sources

1. Ernst & Young: *"Advanced analytics for insurance"*
2. IBM: *"Business analytics for insurance: Four ways insurers are winning with analytics"*
3. AgencyBloc: *"[Free eBook] AgencyBloc's Dashboard Analytics"*
4. Deloitte: *"Insurance Analytics: Driving insight to gain advantage"*