



INSURESIGHT® FOR DISTRIBUTORS

CASE ANALYTICS SERVICE | A CLOUD-BASED
ANALYTICS & BENCHMARKING SERVICE

Developed by iPipeline's data analytics and data science team, the Case Analytics service for InsureSight® leverages data from iPipeline's Agency Management System, which is comprised of 300+ BGAs, 70+ Carriers, 800K+ annual application submissions, \$8B+ in annuity deposits, and \$4B+ in life premium within the industry. The result? Real-time performance metrics across your agency, and against the industry, to see how you're stacking up.

PERFORMER SCORECARDS

Curious how your agents and case managers stack up against each other? What about your CRM Owners? InsureSight's scorecard feature provides you with their overall ranking compared to their peers across key metrics, including: cycle time, placement ratio, paid cases, paid premium, and much more.

EXECUTIVE DASHBOARD

InsureSight's executive dashboard displays performance tracking and comparative analytics over the last 30 days to bring to light the most relevant insights for driving your business. Easily see the top premium that placed and fell through, as well as your top open cases by premium based on days outstanding. You can specify a tolerance threshold in days to identify cases at risk of not placing, and easily drill into each policy for details.

COMPARATIVE ANALYTICS

With InsureSight, you get detailed vision into the performance of not only your products, agents, and case managers, but also how they compare to the industry average. Easy-to-view charts and widgets help you to identify underperformance or exceptional sales in an instant. Simply click a data point in any chart for a case drill-down into what's contributing to that average.

CASE DISTRIBUTION AND PERFORMANCE

InsureSight's case performance dashboard provides you with a view of case distributions by status, state, age, and face amount -in total, -by specific products, or even -by single agent, case manager, or CRM to give a view into their performance.

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FEATURES

- Color-coded thresholds for easy identification of underperformance
- Multiple views, including executive / high level overviews, plus -by product, agent case manager, carrier, case, and more
- Granular analysis through filterable data
- Bookmark pre-filtered views for quick reference
- Comparative analytics for year on year, month over month, or industry comparisons
- See agent's premium goals (entered in Agency Integrator) stacked up against actuals
- Performance scorecards identify actionable areas for improvement
- Break down cycle times, viewing average time a case spends in each status across all your Carriers

BENEFITS

- Create whitespace reports to view how your carriers perform with products you don't sell through them
- Hold Carriers, Agents, and Case Managers accountable for performance through KPI peer scorecards
- See your pipeline by carrier and what you can expect to close
- See opportunities for additional premium from carriers acting under your average
- Identify trending industry product and anticipate new target demographics
- Market new product launches to your most successful distribution channels
- Pinpoint your threshold of cases at risk of not placing, and drill into policy details to nudge these cases along
- See which statuses and requirements are bottlenecks in the process
- See missed premium and identify trends