



Total Revenue \$18,392,731	New Business \$7628.93
	Renewal Business \$7628.93

\$320
Average New business premium per policy

Highest selling LOBs

- Automobile
- Fire
- Marine
- Commercial

10
LOB

Cogitate Insura Agency Inc

Insura Agency Inc
Agency overview

- 1,234 Active Policies
- 29 Total Agents
- 987 Active Customers

Overall Revenue **\$183,927** ↑12.3%
Last Month: \$123,890

New Business | Renewal Business

New Business Premium
223 policies sold

PIF for NB: **\$32,443** (from 142 Policies)

Quote to Bid ratio: **15%** ↑12.3% when compared to last year

\$320
Average New business premium per policy

Recently Sold Policies

Cogitate

Producer Portal

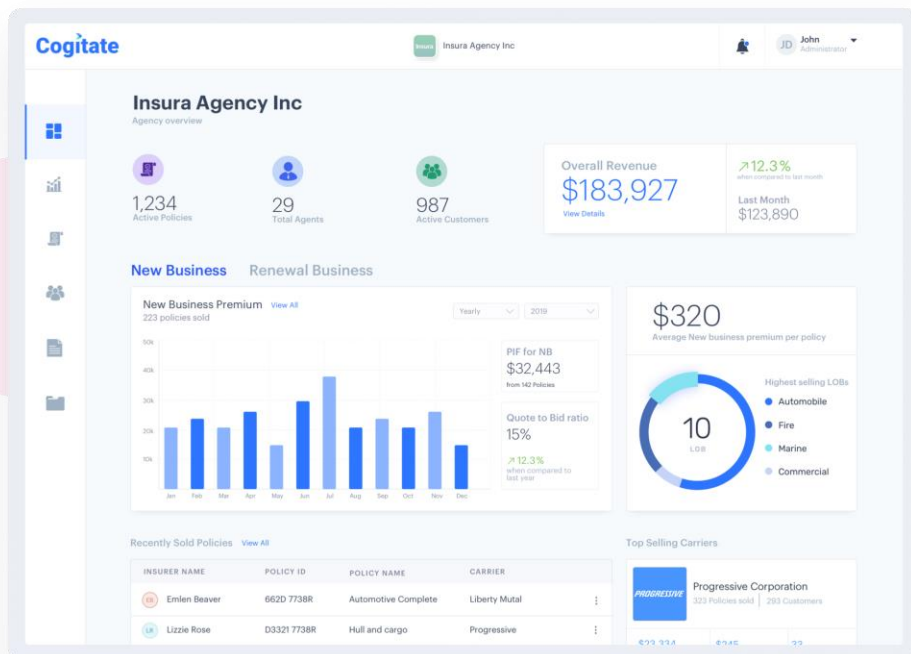


Agency Self-service Portal

Cogitate Producer Portal is a digital interface that allows insurance carriers or MGAs to enable self-service to their independent or captive agents. The portal provides on-demand access to information related to quotes, policies and business information of an agency. This tool is very useful to MGAs, wholesale brokers and carriers for reducing incoming service requests from agent partners.

The Cogitate Producer Portal allows agents to quickly access the customer policy documents and business performance details of their agency. Its most useful feature produces insightful business reports for agents, which include revenue reports, commission statements, agency scorecards, new and renewal business, etc. Additionally, it maintains the contact information of agents and offers ready access to the marketing brochures library.

Cogitate Producer Portal can be customized with a selection of features, depending on the requirement of the insurance carrier or MGA, along with personalization of logos and brand colors.





Features

Dashboard

Dashboard provides a quick snapshot of the most relevant business information for an Agency principal. It includes reports such as:

- New and renewal business premium value with average premium per policy
- Quote-to-bind ratio
- Policy-in-force count
- Premium classification by lines of business

Commission Statement

An agency can generate commission statements whenever required:

- Commission statements for specific time periods
- Real-time commission statements
- Ability to view and download commission statements

Producer Score Card & Revenue Report

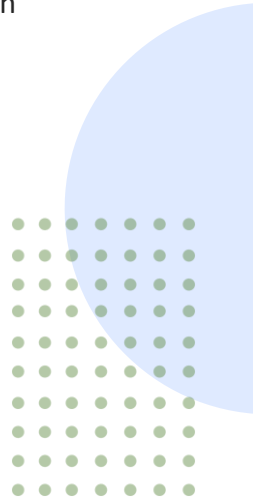
Comprising of important KPIs, this feature helps an agency principal to analyze the performance of the business and take improvement measures:

- Premium and average premium per policy for new and renewal business
- Policy-in-force counts for new and renewal business
- Quote-to-bind ratio
- New and renewal business premium based on lines of business

Policy Document Access

Agents can access the customers' policy related documents:

- Ability to search for policies by policy number, policyholder's name, etc.
- Ability to view, download or email the required policy documents
- Integrated with document management systems like ImageRight to fetch documents from the built-in-repository





Access to Marketing Brochures

This is a repository of all marketing assets like brochures, videos, PPTs, etc. that can be used by an agency for sales and marketing purposes:

- One-stop place for all marketing documents
- Ability to view, download and email documents directly from the application

Agency Contact Management

An Agency contact directory that maintains the employee information:

- Contact details of employee of the agency
- Ability to add, edit and delete agents' contact details
- Access to representatives of insurance companies for quick and easy communication