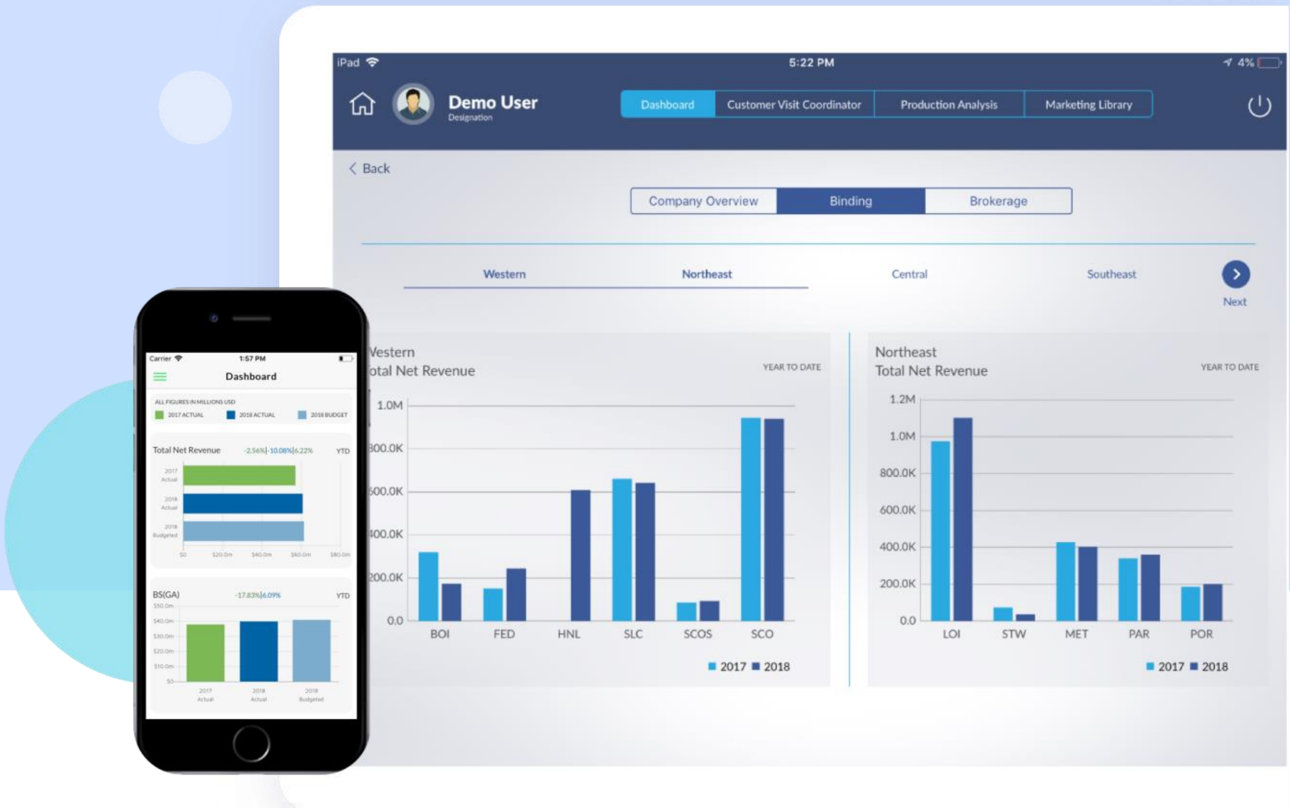
Datasheet



Cogitate

Sales Performance Management

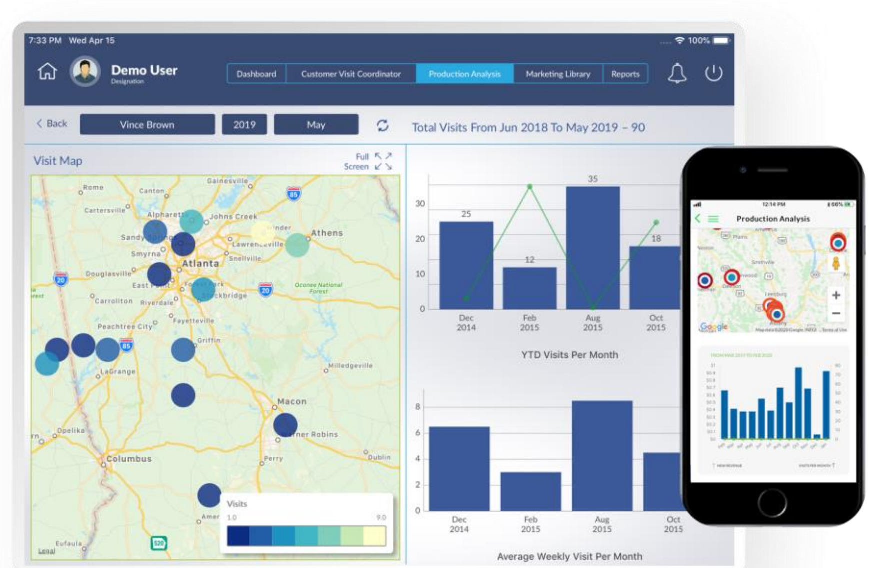
Sales Information at Your Fingertips

Cogitate Sales Performance Management is a digital business reporting application that enables insurance carriers, wholesalers and MGAs to monitor corporate sales performance and instantly access crucial information with the click of a button. This solution is extremely valuable to management and sales executives for efficiently overseeing their agent network to drive growth and sales. The application is available on both web and mobile platforms.

Cogitate Sales Performance Management has numerous built-in reports specific to the needs of insurance companies. It provides real-time access to the sales performance details of an organization, its sales team and its channel partners. Regional sales reports, yearly and monthly performance reports with comparisons, lines of business reports, carrier reports and more are available for performance analysis.

The application includes *Visit Coordinator* for territory managers to schedule their field visits, log the details of each visit and manage the contacts of agencies assigned to them. It allows management to monitor the performance of its sales team – both internal (territory managers) and external (agent partners) – and take corrective actions if needed.

- Easy integration with clients' existing systems, i.e., Customer Relationship Management (CRM), Agency Management System (AMS) and data processing systems
- User rights and access management through LDAP/Active Directory
- Emails and notifications



Features

Executive Dashboard

Quick snapshot of important sales information.

- On-demand access to key sales reports
- Information drill-down capability
- Year-over-year performance comparisons by:
    - Territory - national, regional, state, county
    - Lines of business
    - Teams and individuals

Agency Management

Monitors the performance of agencies and enables better coordination with them for higher sales.

- Access to comprehensive reports of an agency:
    - Top lines of business by revenue
    - Top carriers by revenue
    - Top brokers by revenue
    - Submission-to-bind ratio
- Agency scorecard for performance measurement
- Ability to schedule agency visits
- Ability to manage the details of agency contacts
- Ability to select top (favorite) agencies to monitor their performance

Distribution Management

Improves productivity by offering real-time visibility of sales representatives' field activities and performance to their respective managers.

- Graph of 'Visits vs. Revenue Report' for every sales representative
- Map of 'Visits vs. Revenue Report' for every sales representative
- Statistical reports of:
    - Most visited agencies with associated revenue
    - Revenue/non-revenue producing agencies
    - Top agencies by revenue which were not visited

Analytics of Visits and KPIs

Access to configurable reports about field visits made by sales representatives and underwriters. Filters to segregate information by categories like regions, sales representatives and agencies.

- Agency visit reports with various filters and detailed information of each visit - total visits, call reports, etc.
- Submission to quote-to-bind comparison with date range selection
- Automatic report generation for selected (favorite) agencies with KPIs

Marketing Library

Repository of all marketing assets such as brochures, videos, presentations, etc. to share with agencies.

- On-demand access to the repository for sales representatives and underwriters
- Ability to view, download and email documents directly from the application
- Integration with the client's CRM tool and data repository to retrieve any marketing asset directly

Branch Directory

Helpful for large insurance companies with a presence in multiple states, this is a register of the employees of every branch with their contact information and expertise.

- Branch information like address, contact details, lines of business, navigation
- Employee information like name, designation, contact number, expertise
- Ability to search for contacts by branch, name and line of business