

# INSURESIGHT ANNUITY ANALYTICS FOR CARRIERS

## FEATURES

### Key Performance Indicators

- Review key performance indicators such as:
  - Number of Orders
  - Total Deposits
  - Average Deposits
  - Total Advisors
  - Total products

### Various Analytical Views

- See key performance indicators on the following dashboard views:
  - High-Level Performance
  - Order Summary
  - Distributor Sales Orders
  - Orders by Status
  - Order Detail Report

### Comparative Metrics

- Compare performance metrics to your previous year's performance to identify trends

### Drill Into Case Details

- See underlying order details behind each report and visualization
- See the detailed status history behind each order
- See all fund types, riders...etc. associated with each order

### Filter Data

- Filter all KPIs and dashboards above by the following for more granular analysis:
  - Date Range
  - Distributor
  - Transaction Status
  - Fund Type
  - Arrangement Type
  - Product
  - Rider
  - Payment Description
  - State



## BENEFITS

### Monitor Pipeline

- Monitor your incoming business and pipeline by reviewing orders and deposit amounts for various transaction statuses
- See number of orders and amount of deposits in each transaction status, broken out by distribution channel

### Track Business Performance

- See how your order, deposit, and advisor numbers are trending year over year by distributor, payment description, state, and more

### Identify Trends

- Analyze your data for trends in:
  - Fund types
  - Riders
  - Products
  - Arrangement Types

### Resolve Bottlenecks

- Review the status history of each order to help resolve potential bottlenecks before they become a detriment

### Orders by Transaction Status

TRANSACTION STATUS	ORDERS	DEPOSITS
Transmitted	1,890	\$274.10M
In Progress	674	\$82.87M
Purged/Deleted	550	\$81.55M
Forms Rendered	389	\$54.02M
Cancelled	169	\$29.86M
Cancel/ Reworked	112	\$12.56M
Pending Approval	64	\$8.40M
Cancel/ Rejected	41	\$7.97M
Rework Pending	38	\$4.39M
Pending Requirements	36	\$11.24M
Pending Transmission	17	\$2.58M
Transmission Failure	2	\$130.00K

