

## Sales and Marketing

Improving the top line performance is a challenge for any organization. Insight Enterprise not only provides the tools to analyze and manage sales performance, it also allows you to analyze business performance metrics and financial statements by agent and office.

Insight Enterprise provides a range of Sales and Marketing applications that integrate agent management with the analysis of sales across the full policy lifecycle allowing agent sales to be viewed in the light of the quality of sales.

With flexible sales hierarchies and sales split over any number of agents, Insight Enterprise provides unrivalled ability to appreciate and manage sales performance.

The following application groups will be of particular interest to Sales and Marketing departments:

### **Agent Analysis**

Agent analysis provides profiling and trending of agents and their associated transactions over time by the full set of agent attributes. Similar to policy movements, agent movements reconcile and explain changes in your salesforce over time by a range of measures including agent numbers.

Agent Analysis provides understanding of movements and transactions in the context of the agents, with drill-through to individual records.

### **Sales Analysis**

Sales Analysis provides profiling and trending of policy commissions, policy movements and application movements by agent, with drill-through to individual agent records. It includes performance metrics, such as persistency and loss ratios.

### **Profitability Analysis**

Earnings are available in the context of the salesforce, providing profitability by agent and office.

Insight Decision Solutions was established by insurance professionals to provide integrated, enterprise-wide, analytical systems for insurance companies.

We focus solely on insurance to bring you analytical solutions to meet your needs.

Our staff consists of qualified professionals, with extensive experience in insurance and systems.

# Insight Enterprise

*Smart, confident decisions.*

Insight Enterprise is a complete business intelligence system consisting of insurance analytics and applications, data storage, and data transformation and loading tools.

The system includes a number of unique features, including:

- Pre-built insurance specific applications, such as experience analysis, earnings by source and sales profitability.
- Open data model structured specifically for Life and Health insurance.
- Temporal data model enabling flexible analysis over time with fast response times for insurance applications.

The screenshots illustrate the software's capabilities in providing comprehensive insurance analytics. The top dashboard offers a high-level view of policy movements and inforce counts across different age groups. The middle dashboard provides a detailed look at earnings trends and profit sources over time. The bottom screenshot shows a granular view of financial metrics, including investment gain, expense gain, commission gain, mortality, withdrawal, and cancellation, along with risk and valuation data.

## Insight Decision Solutions

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