**INSURANCE ANALYTICS**

**CROSS SELL / NEW / RENEWAL**

**TARGET**: SUM OF CROSS SELL / NEW / RENEWAL BUDGET IN INDIVIDUAL BUDGET

**ACHIEVED**: SUM OF AMOUNT WHERE INCOME SELL= “CROSS SEEL”/”NEW” /”RENEWAL” IN THE BROKRAGE SHEET **+** SUM OF AMOUNT WHERE INCOME SELL= “CROSS SEEL” /”NEW” /”RENEWAL” IN THE FEES SHEET

**INVOICE** : SUM OF AMOUNT WHERE INCOME SELL= “CROSS SEEL” /”NEW” /”RENEWAL”IN THE INVOICE SHEET

**PLACED ACHIEVEMENT % OF CRESS SELL / NEW/ RENEWAL**

ACHIEVED / BUDGET OF CROSS SELL , NEW, RENEWAL

**INVOICE ACHIEVEMENT OF CRESS SELL / NEW/ RENEWAL**

INVOICE / BUDGET OF CROSS SELL , NEW, RENEWAL

**YEARLY MEETING COUNT**

COUNT THE MEETING DATE IN THE MEETING SHEET BY YEAR WISE

**NO OF MEETING BY ACCOUNT EXECUTIVE**

DRAG ACCOUNT EXECUTIVE TO COLUMN AND COUNT THE ACCOUNT EXECUTIVE FROM MEETING SHEET

**NO OF INVOICE BY ACCOUNT EXECUTIVE**

DRAG ACCOUNT EXECUTIVE TO COLUMN AND AND COUNT THE COUNT THE INCOME CLASS OF ACCOUNT EXECUTIVE PER INCOME CLASS IN INVOICE SHEET

**TOTAL OPPORTUNITIES**

COUNT OPPORTUNITIES NAMES IN THE OPPORTUNITIES SHEET

**OPEN OPPORTUNITIES**

COUNT OPPORTUNITIES NAMES WHERE STAGE = Propose Solution & Qualify Opportunity IN THE OPPORTUNITIES SHEET

**TOP 4 OPPORTUNITIES**

SUM OF REVENUE AMOUNT PER OPPORTUNITE NAMES AND FILTER THE TOP 4 FROM OPPORTUNITIES SHEET

**TOP 4 OPEN OPPORTUNITIES**

SUM OF REVENUE AMOUNT PER OPPORTUNITE NAMES WHERE STAGE= Propose Solution & Qualify Opportunity AND FILTER THE TOP 4 FROM OPPORTUNITIES SHEET

**STAGE FUNNEL BY REVENUE**

SUM OF REVENUE AMOUNT PER STAGE FROM OPPORTUNITIES SHEET

**OPPORTUNITIES PRODUCT DISTRIBUTION**

COUNT OF PRODUCT GROUP PER PRODUCT GROUP FROM OPPORTUNITIES SHEET