

HUMAN...

SALES

CUSTOMER SERVICE

INSURANCE

INVESTMENTS



The Strategia logo is prominently displayed on a wall made of horizontal wooden planks. The logo consists of a stylized 'S' icon followed by the word 'Strategia' in a large, white, sans-serif font.

À chaque
moment ses
décisions.



Go to Menu

[Clear Filter](#)

Hierarchy

HUMAN RESOURCE



Overall	7 Days	14 Days	30 Days	All
Created Date	▼	▼	▼	▼

Scheduled End ...	All	Scheduled Start D...
Overall	7 Days	All

Scheduled Start D...
All ✓

Task Created in the Past

39598

Task Completed in Past

38561

Task Open from Past

1006

Open In the Future

460

**Phone call
Completed**

8679

Phone call Planned

8

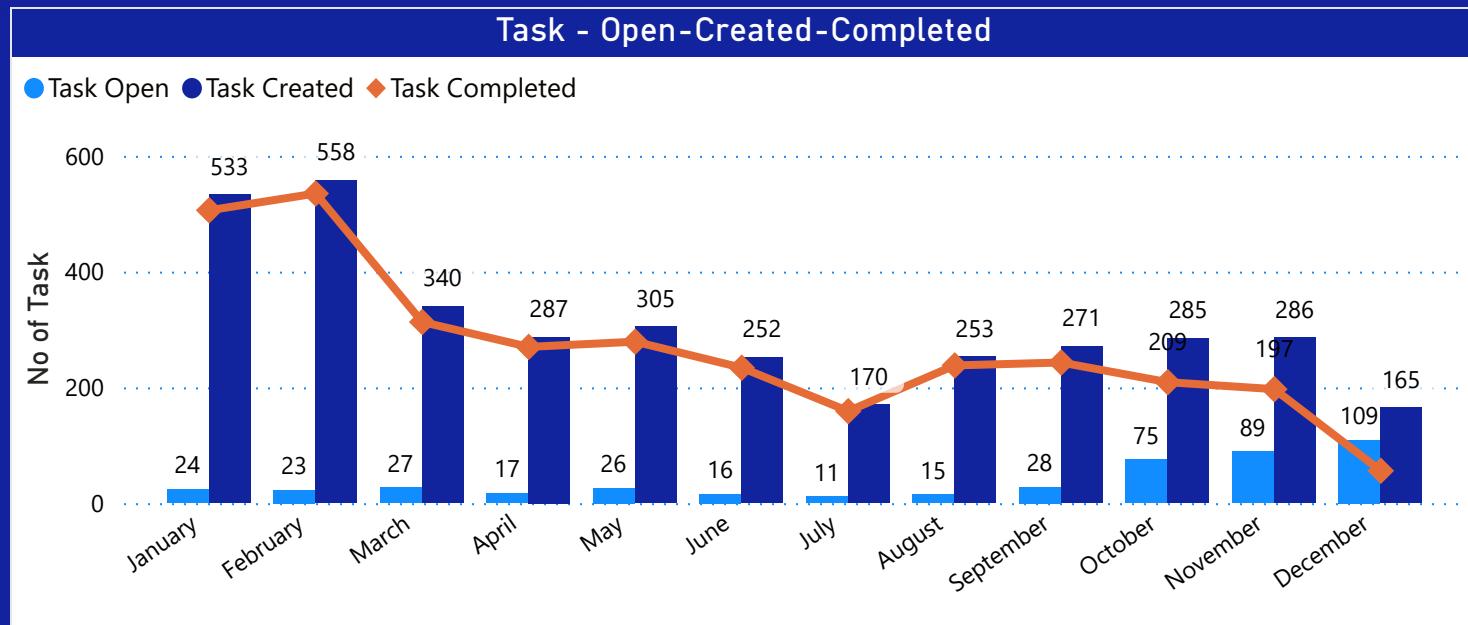
Year

Month 

All 

TimeSheet Hierarchy

Associate Name	January	February	March	April	May
Christiane Côté					85.
Gabriel Côté					85.
Jihane El Ghiat					
Sylvain Therrien	350.00	316.00	367.00	310.50	347.
Sylvie Champagne	66.25	144.25	169.75	111.25	159.
Total	416.25	460.25	536.75	421.75	676.



	January	February	March	April	May	June	July	August	September	October	November	December
Task Created	533	558	340	287	305	252	170	253	271	285	286	
Task Completed	506	535	313	270	279	234	159	238	243	209	197	
Task Open	24	23	27	17	26	16	11	15	28	75	89	
<										>		

[Go to Menu](#)[Clear Filter](#)

SALES

[Currently in Up coming week](#)[Go to Previous week](#)

Insurance Team Owner

Éric Nathalie Pierre Vincent

Mortgage Team Owner

Éric Nathalie Pierre Vincent

UPCOMING DUES

[View Customer List](#)

1363

Insurance Maturity

[View Customer List](#)

254

Mortgage Due

Full Name

All

Category

All

Overall

Placement

Assurances

Hypothèque

All 3 Services

In 2 Services

In 1 Service

Full Name

No of Category

11864017 Canada Inc.	1
223200005,	1
3122298 Canada Inc.	1
223200005,	1
3169693 Canada Inc.	1
223200005,	1
3380165 Canada Inc.	1
223200005,	1
3761045 Canada inc.	1
223200005,	1
Total	3726

MEETING SCHEDULES

0

Meeting Planned

3304
Customers

3862
Customers

[Go to Menu](#)[Clear Filter](#)

CUSTOMER SERVICE

[Go to Upcoming Week](#)[Go to Previous Week](#)> 2 Year [24 Months](#) [18 Months](#) [15 Months](#)**387****Customers without Interaction**[< 1 Year](#) [1 Month](#) [3 Months](#) [6 Months](#)**120****Customers with Interaction**

Avg of: No. of days Task Open

513.4

Avg of: Task to be Closed in 7 Days

0.00

Avg of: Task to be Closed in 14 Days

788.00

Avg of: Task to be Closed in 30 Days

691.56**296****KYC Late**

First Name	Last Name	gfs_datedelamisejour
Ghislaine	Philibert	15-05-2020
Pascale	Marien	15-05-2020
Chantal	Rousseau	13-05-2020
Matthew	Turk	13-05-2020
Céline	Brisebois	07-05-2020
Tammy	Leclair	04-05-2020
Éric	Labossière	28-04-2020
Nancy	Ouellet	27-04-2020
Manon	Labbé	23-04-2020
Ugo	Forget	22-04-2020
Nathalie	Hervé	21-04-2020
Guillaume	Veilleux	17-04-2020
Isabelle	Bonin	14-04-2020
Marie-Christine	De Courcy	14-04-2020
Doris	Paula	09-04-2020

34**KYC For Due**

First Name	Last Name	gfs_datedelamisejour
	Gestion Alain Guy inc.	28-05-2020
Alain	Guy	28-05-2020
Anais	Pilon-Labbé	02-06-2020
Annie	Vincelette	02-06-2020
Bedros	Mastarcyan	23-05-2020
Benoit	David	25-05-2020
Chantal	Lacroix	31-05-2020
Chantal	Leroux	10-06-2020
Claude	Auger	15-06-2020
Désirée	Ramacieri	04-06-2020
Diane	Lécuyer	02-06-2020
Emilie	Roy	27-05-2020
François	Leduc	03-06-2020
Gabriel	Julien	12-06-2020

[Go to Menu](#)[Clear Filter](#)

CUSTOMER SERVICE

[Go to Upcoming Week](#)[Go to Previous Week](#)[> 2 Year](#)[24 Months](#)[18 Months](#)[15 Months](#)**387****Customers without Interaction**

Avg Closed days

1,209.13

Avg Closed in 7 Days

0.00

Avg Closed in 14 Days

0.00

Avg Closed in 30 Days

551.00

[< 1 Year](#)[1 Month](#)[3 Months](#)[6 Months](#)**120****Customers with Interaction**

First Name	Last Name	gfs_datedelamisejour
Ghislaine	Philibert	15-05-2020
Pascale	Marien	15-05-2020
Chantal	Rousseau	13-05-2020
Matthew	Turk	13-05-2020
Céline	Brisebois	07-05-2020
Tammy	Leclair	04-05-2020
Éric	Labossière	28-04-2020
Nancy	Ouellet	27-04-2020
Manon	Labbé	23-04-2020
Ugo	Forget	22-04-2020
Nathalie	Hervé	21-04-2020
Guillaume	Veilleux	17-04-2020
Isabelle	Bonin	14-04-2020
Marie-Christine	De Courcy	14-04-2020
Doris	Paulik	09-04-2020

First Name	Last Name	gfs_datedelamisejour
Claude	Auger	15-06-2020
Gabriel	Julien	12-06-2020
Luis Alberto	Diaz Purilla	11-06-2020
Chantal	Leroux	10-06-2020
Meriem	Hami	10-06-2020
Jessica	Langevin	08-06-2020
Philippe	Langlois	08-06-2020
Hélène	Vincelette	05-06-2020
Natalie	Léger	05-06-2020
Désirée	Ramacieri	04-06-2020
Jonathan	Pagano	04-06-2020
Marie-Claude	Bourque	04-06-2020
Martine	Perrier	04-06-2020
Sandra	Campanelli	04-06-2020

[Go to Menu](#)[Clear Filter](#)

Hierarchy
All

INSURANCE

**Active****3312**

Contract

\$654M

Capital Insured

\$1M

Premium

In Process**22**

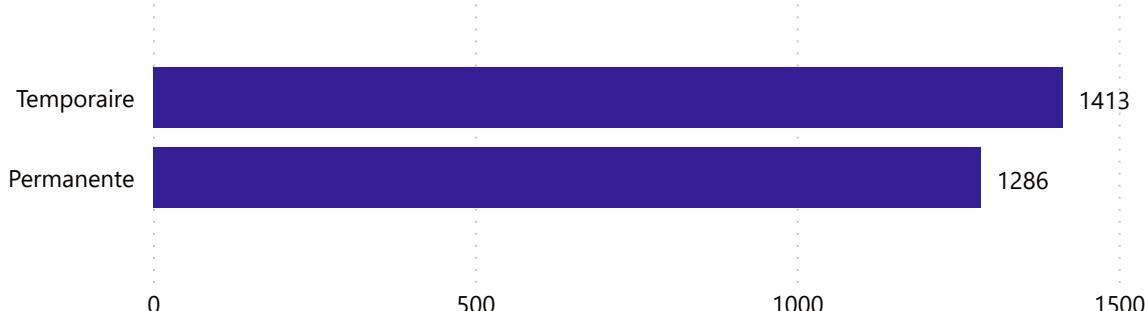
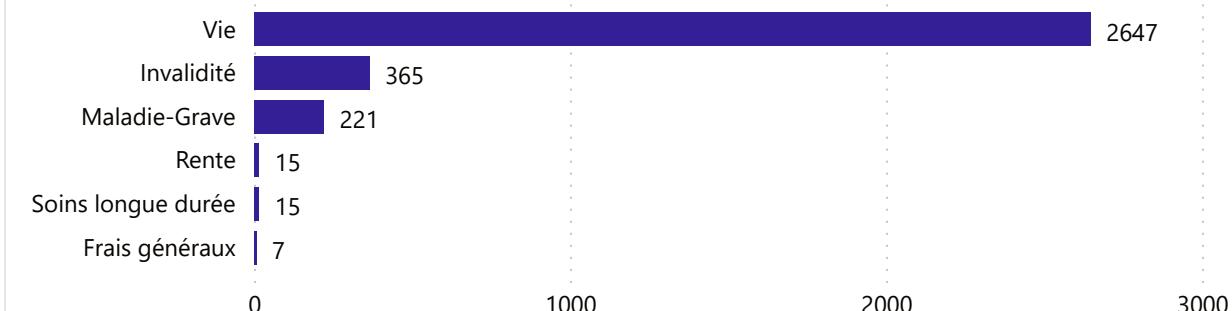
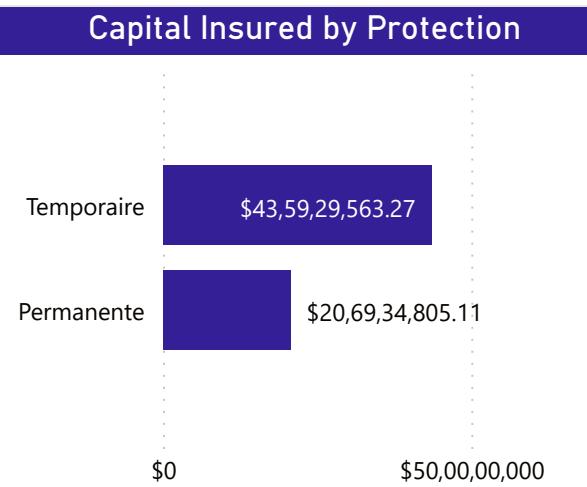
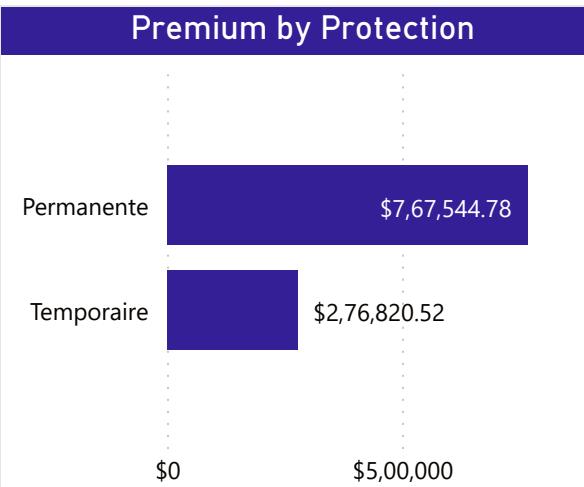
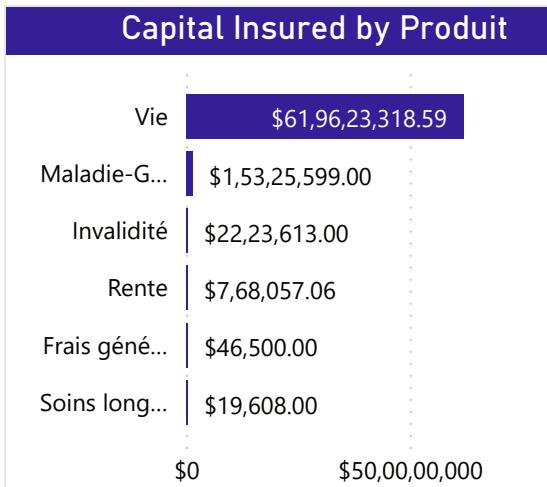
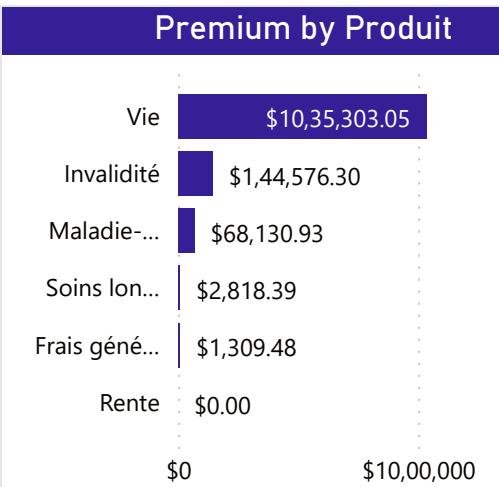
Contract

\$3M

Capital Insured

\$5K

Premium

Active Contract by Protection**Active Contract by Produit****Capital Insured by Protection****Premium by Protection****Capital Insured by Produit****Premium by Produit**

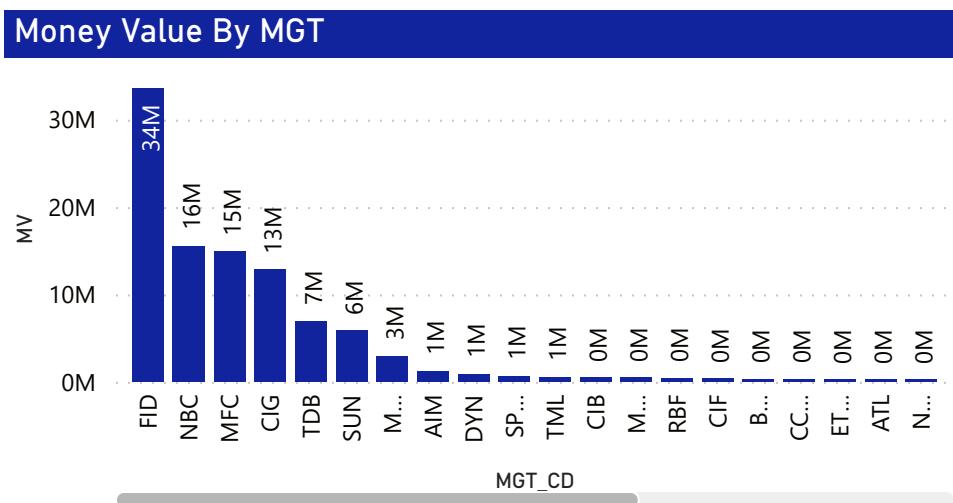
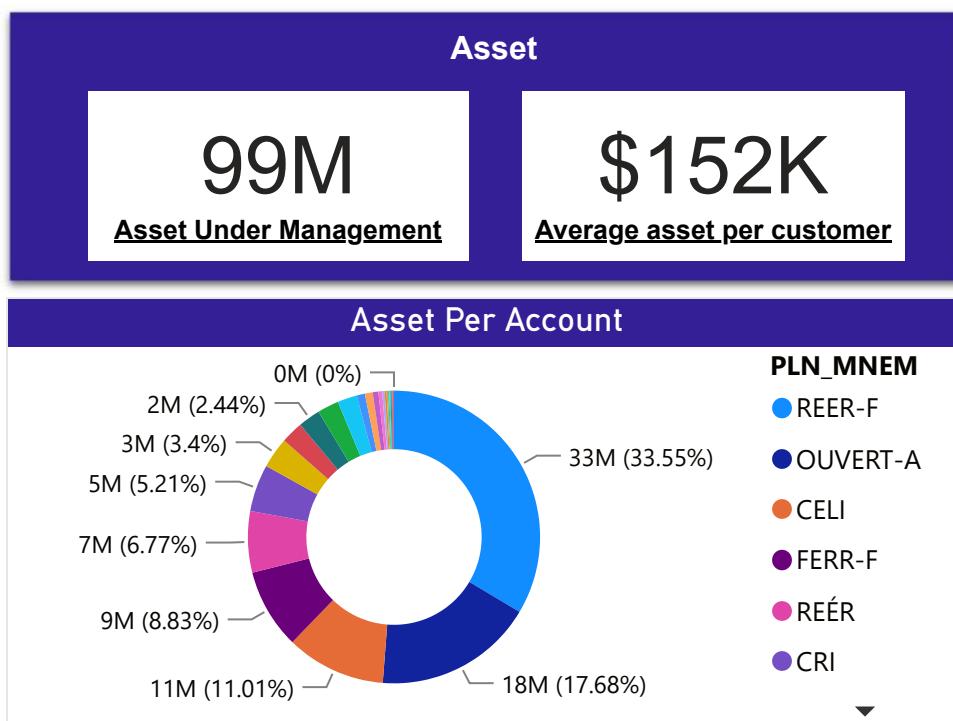
Go to Menu

Clear Filter

YearMonth

All

INVESTMENTS



Customer Details

IVR_SYSID	First Name	Last Name	Pln Mnem
16585973		OUVERT	
39256076		OUVERT	
39395003		OUVERT	
40032756		OUVERT	
40032868		OUVERT	
45538497		OUVERT	
16275056		OUVERT-A	
16363241		OUVERT-A	
16465424		OUVERT-A	
29974507		OUVERT-A	
35685712		OUVERT-A	
37085970		OUVERT-A	
39272820		OUVERT-A	
39487225		OUVERT-A	
40121618		OUVERT-A	
41679574		OUVERT-A	
41789615		OUVERT-A	
44280966		OUVERT-A	
45948304		OUVERT-A	
46072973		OUVERT-A	
49264009		OUVERT-A	
49802743		OUVERT-A	
39395038	Rosa	Abate	CELI
39395038	Rosa	Abate	REER-F
44524949	Elysabeth	Angers	CELI-A
44524949	Elysabeth	Angers	OUVERT-A
44524949	Elysabeth	Angers	REER-F

Cash Position

First Name	Last Name	Money Value
Patricia	Giguere	270000
Melissa	Gilbert	182389
Louis-Philippe	Lemaire	75000
Patricia	Giguere	37535
Diane	Beausoleil	20000
Gilles	Doyon	14615
Denis	Lapointe	6000
FRANCOIS	Barre	4375

Turning 71 Years old this years

IVR_SYSID	IVR_PRIM_FNAME	IVR_PRIM_LNAME