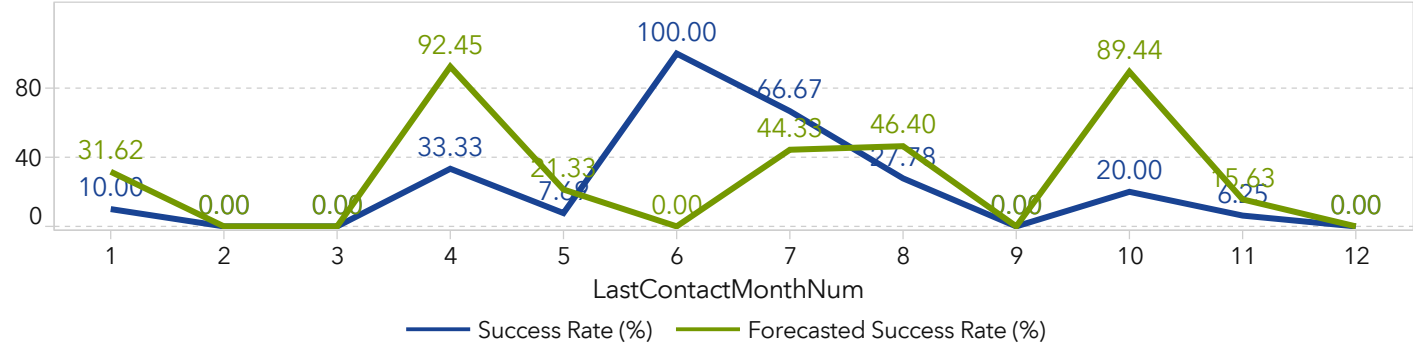


Executive Metrics

New Sale Success Performance (Actual vs. Forecast)

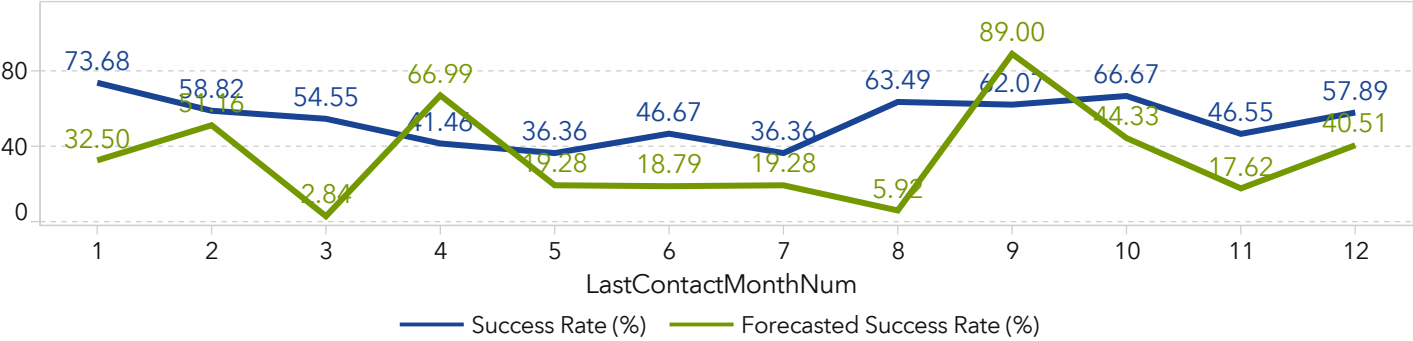
Success Rate (%) / Forecasted Success Rate (%)



▼ [A1.1](#)

Renewal Success Performance (Actual vs. Forecast)

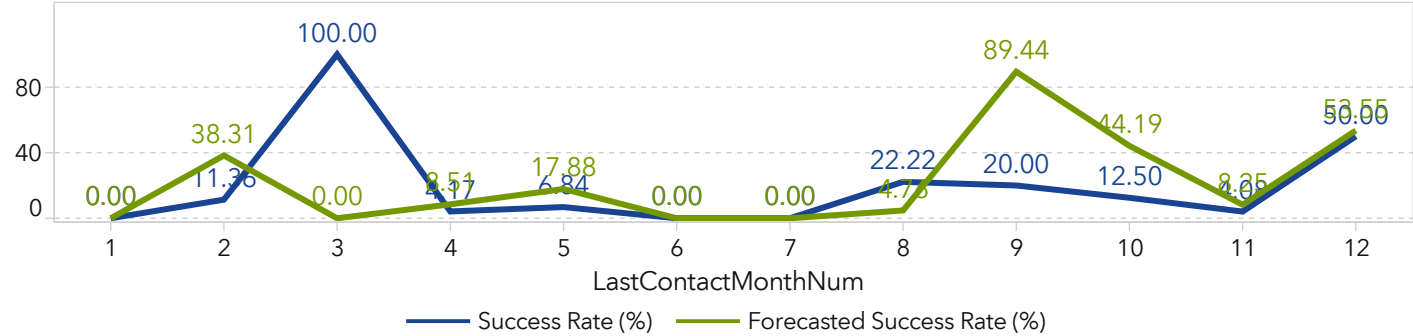
Success Rate (%) / Forecasted Success Rate (%)



▼ [A1.5](#)

Cross Sale Performance (Actual vs. Forecast)

Success Rate (%) / Forecasted Success Rate (%)

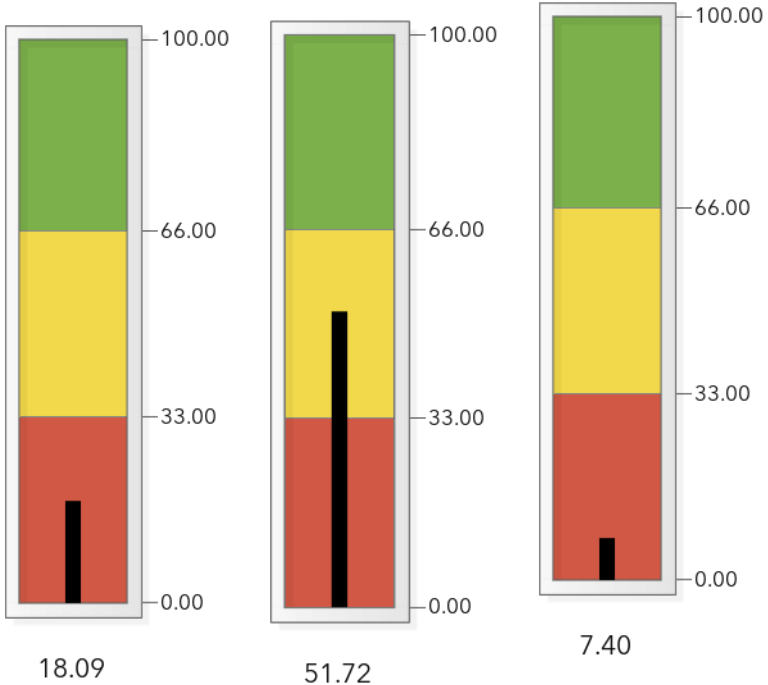


▼ [A1.6](#)

Annual New Customer Sale Success Rate (%)

Annual Renewal Success Rate (%)

Annual Cross Sale Success Rate (%)



▼ [A1.2](#)

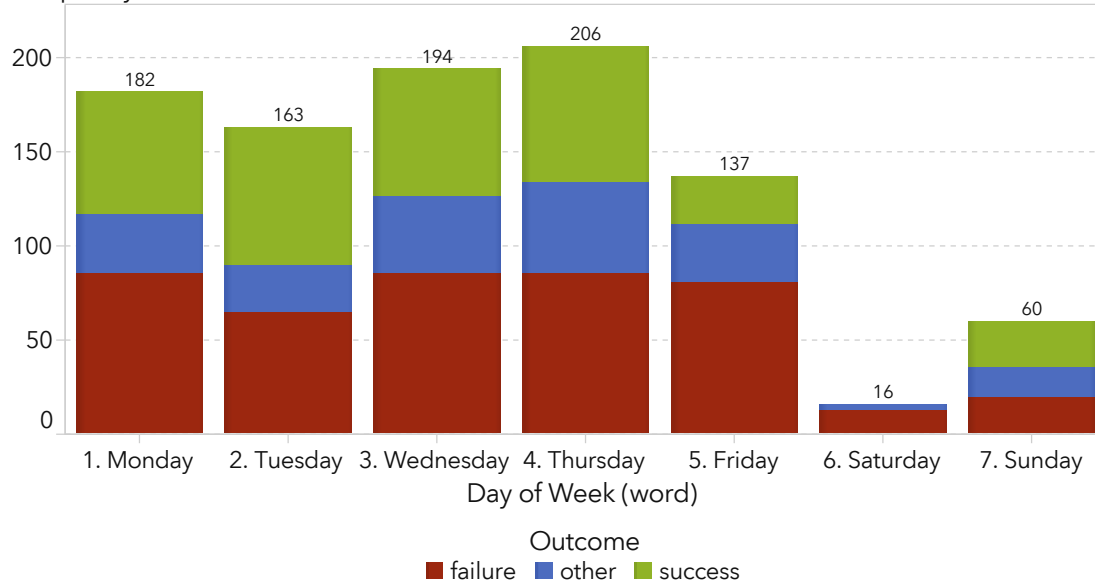
▼ [A1.3](#)

▼ [A1.4](#)

Sales Team Performance

Call Frequency (grouped by day and outcome)

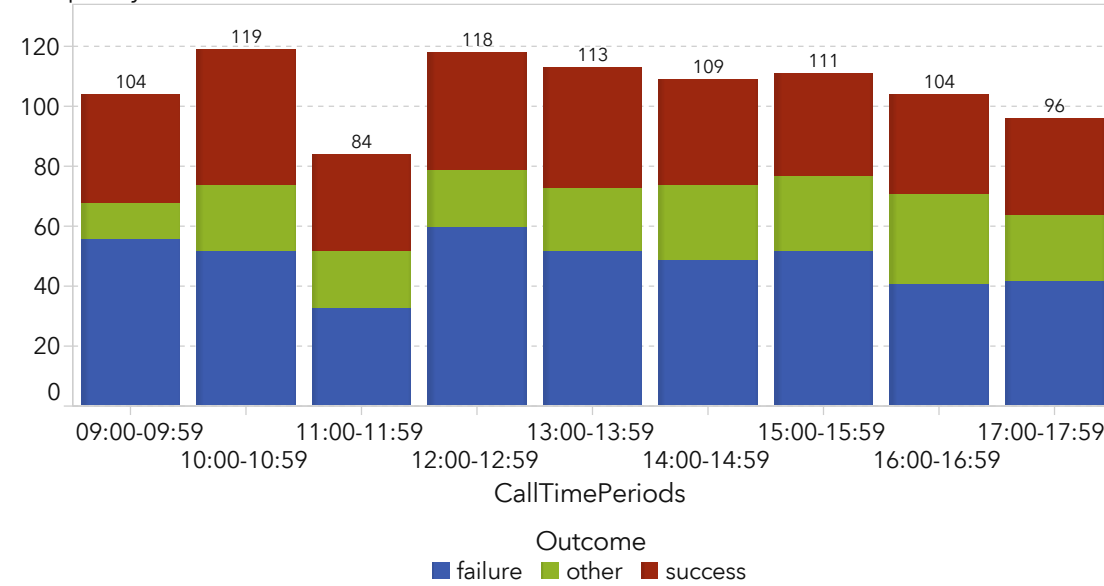
Frequency



▼ [A2.1](#)

Call Frequency (grouped by time and outcome)

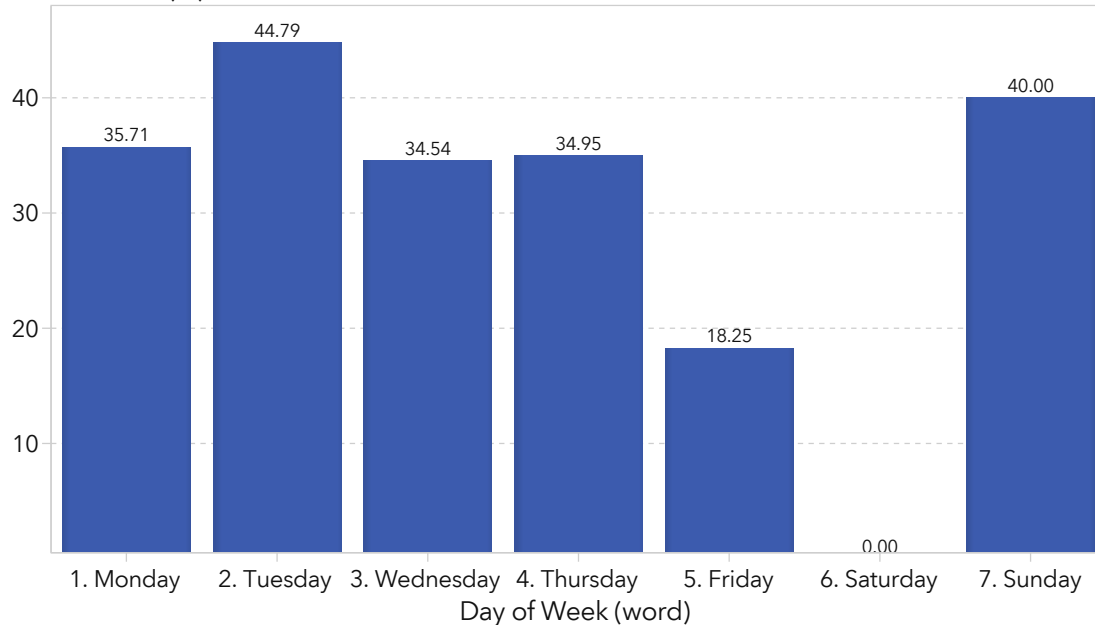
Frequency



▼ [A2.2](#)

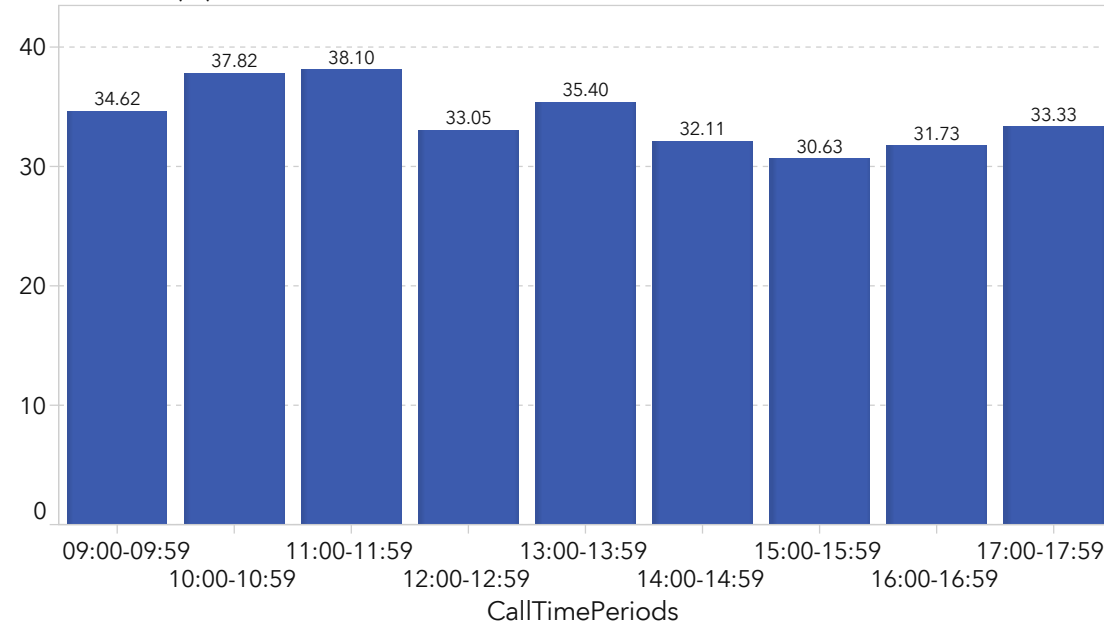
Call Success Rate (grouped by day)

Success Rate (%)



Call Success Rate (grouped by time)

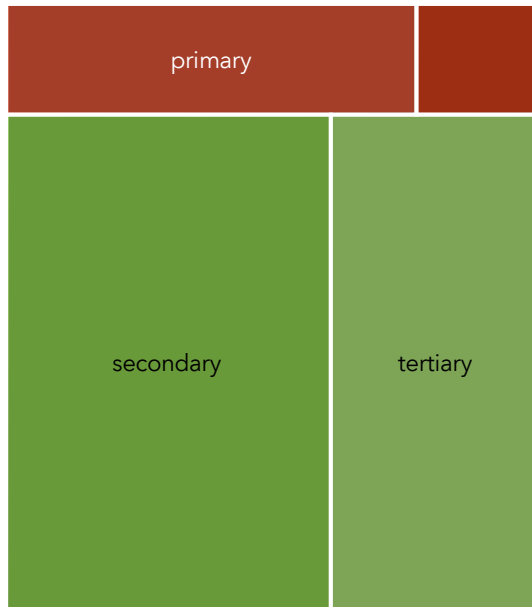
Success Rate (%)



Target Customer Profiles

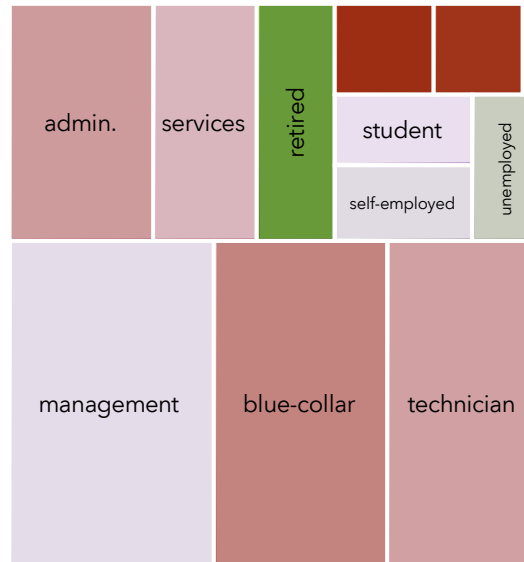
Customer count by Education

Education

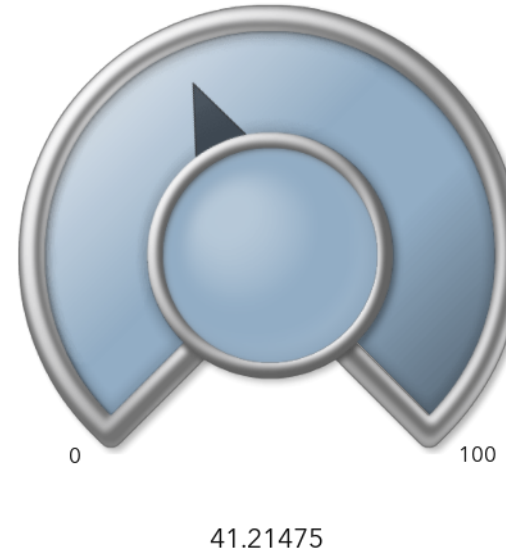


Customer count by Job Occupation

Job

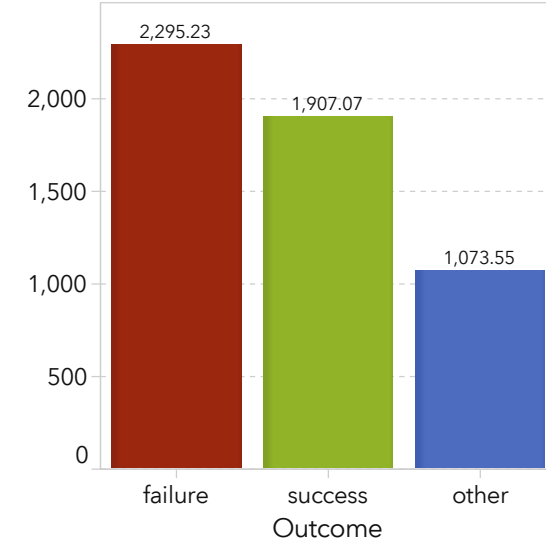


Average Customer Age



Average Call Time by Outcome

CallDuration (minutes)

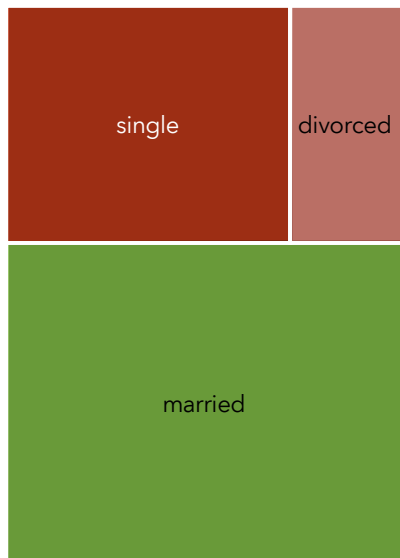


[A3.1](#)

▼ [A3.2](#)

Customer count by Marital status

Marital Status

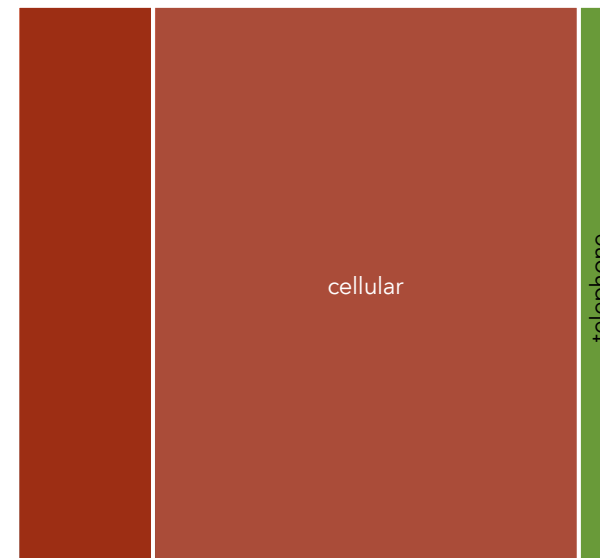


Product Ownership

HasCarIns... ▲	HasHouseInsurance ▲	HasCarLoan ▲
No	No	No
	No	Yes
Yes	Yes	No
	Yes	Yes
No	No	No
	No	Yes
Yes	Yes	No
	Yes	Yes
Total		

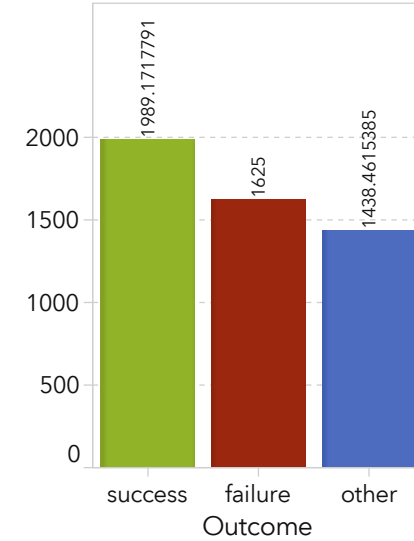
Customer count by Communication Method

Communication Method



Average Balance by Outcome

Balance



▼ [A3.3](#)

Target Customer Success Rate

Red = lower success rate , Green = higher success rate . Box size indicates customer count.

Success Rate by Education Type

Education



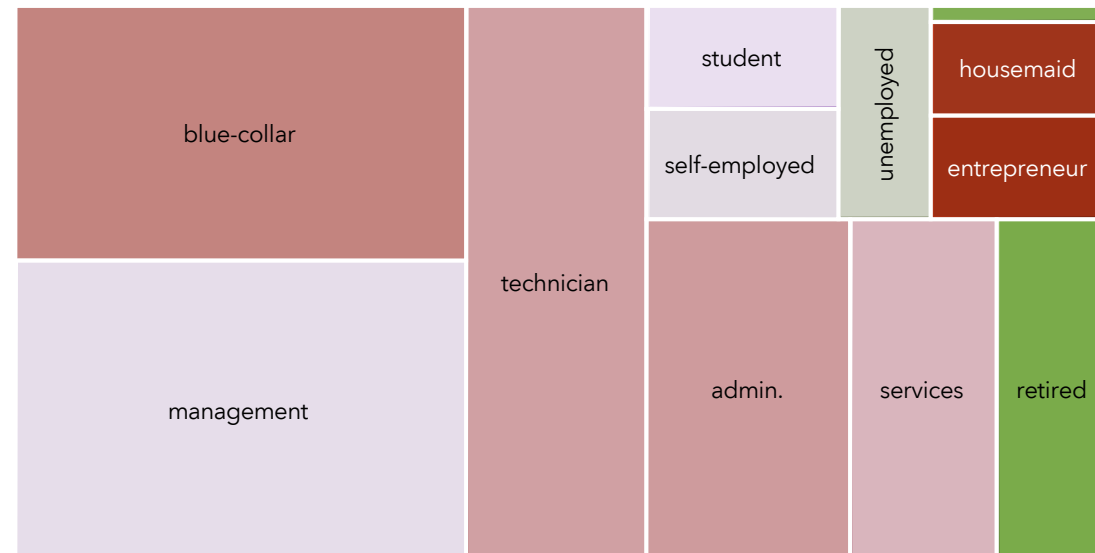
Success Rate by Account Balance

Balance Group



Success Rate by Job Occupation

Job



Success Rate by Age Group

Age Group



[A1.1](#)

New Sale Success Performance (Actual vs. Forecast)

Filters

(Customer Relation In('None')) AND Customer Relation NotMissing

[A1.2](#)

Annual New Customer Sale Success Rate (%)

Filters

(Customer Relation In('None')) AND Customer Relation NotMissing

Display Rules

KPI

0 ≤ x < 33

33 ≤ x < 66

66 ≤ x ≤ 100

[A1.3](#)

Annual Renewal Success Rate (%)

Filters

(Customer Relation In('Car and House Insurance'; 'Car Insurance'; 'Car Insurance, Car Loan and House Insurance')) OR Customer Relation Missing

Display Rules

KPI

0 ≤ x < 33

33 ≤ x < 66

66 ≤ x ≤ 100

[A1.4](#)

Annual Cross Sale Success Rate (%)

Filters

(Customer Relation In('Car Loan'; 'Car Loan and Car Insurance'; 'House Insurance'; 'House Insurance and Car Loan')) OR Customer Relation Missing

Display Rules

KPI

0 ≤ x < 33

33 ≤ x < 66

66 ≤ x ≤ 100

[A1.5](#)

Renewal Success Performance (Actual vs. Forecast)

Filters

(Customer Relation In('Car and House Insurance'; 'Car Insurance'; 'Car Insurance, Car Loan and House Insurance')) OR Customer Relation Missing

[A1.6](#)

Cross Sale Performance (Actual vs. Forecast)

Filters

(Customer Relation In('Car Loan'; 'Car Loan and Car Insurance'; 'House Insurance'; 'House Insurance and Car Loan')) OR Customer Relation Missing

[A2.1](#)

Call Frequency (grouped by day and outcome)

Filters

Outcome NotMissing

Display Rules

Graph

■ success

■ failure

■ other

[A2.2](#)

Call Frequency (grouped by time and outcome)

Filters

Outcome NotMissing

[A3.1](#)

Average Customer Age

Display Rules

KPI

■ $0 \leq x < 100$

[A3.2](#)

Average Call Time by Outcome

Filters

Communication Method In(ALL)
Outcome NotMissing

Display Rules

Graph

■ success

■ failure

■ other

■ Other

[A3.3](#)

Average Balance by Outcome

Filters

Outcome NotMissing

Display Rules

- Graph
- success
- failure
- other
- Other