**Branch Dashboard**

1. Branch dashboard to discuss New and renewal business number with each branch. This dashboard will be discussed between Corporate team and Individual branch heads.
   1. Individual performance within the branch:
      1. **Target FY** from Individual target sheet (New, Cross sell and Renewal) Fields to be referred (Column C, E, F and G)
      2. **Placed Achievement** form Brokerage + Fees sheet (New, Cross sell and Renewal) (Brokerage sheet: Column G, J, M, K, L) (Fees Sheet: B, D, E, F, G)
      3. **Invoiced Achievement** from Invoice sheet (New, Cross sell and Renewal) Column (B, F, G, J)
      4. **Percentage of Achievement** for Placed and Invoice – (Achieved/budget)
      5. **No of meetings** for current year – Meeting sheet (A, C, D)
      6. **Open Oppty** – Opportunity report (Column: C, E, F, G) (Stage ‘Open’ Column G = Propose Solution & Qualify Opportunity)
      7. **Closed Won** – Opportunity report (Column: C, E, F, G) (Stage ‘Won’ Column G = Won)
      8. Conversion Ratio (Closed Won/Total Opportunity)
      9. Further drill down to individual level top 10 open oppty and Win

KPI List

1-No of Invoice by Accnt Exec

2-Yearly Meeting Count

3.1Cross Sell--Target,Achive,new

3.1New-Target,Achive,new

3.1Renewal-Target, Achive,new

4. Stage Funnel by Revenue

5. No of meeting By Account Exe

6-Top Open Opportunity