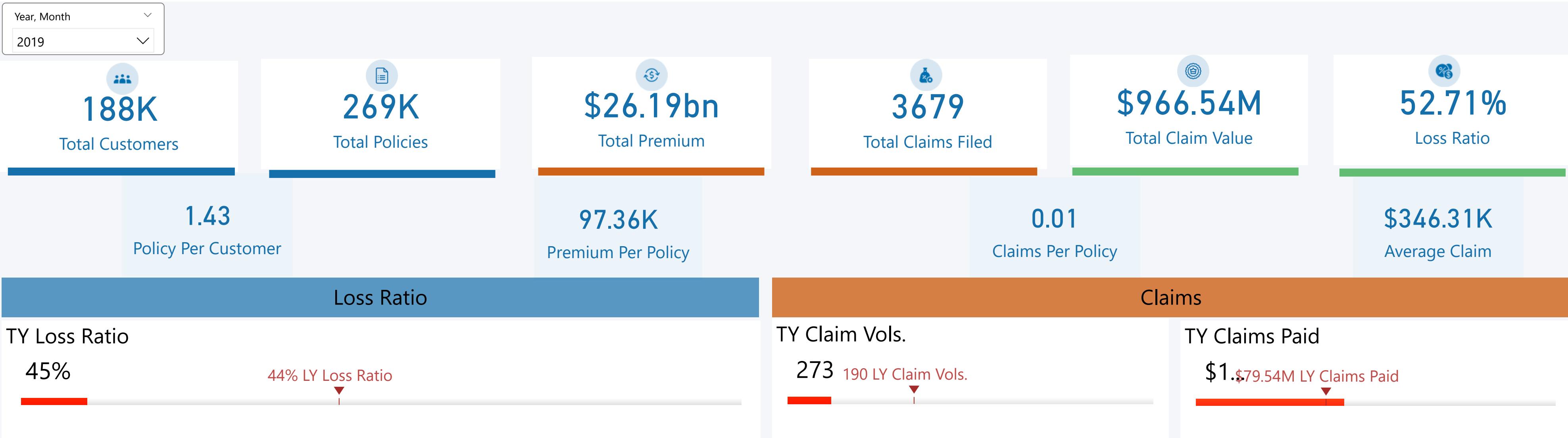


Portfolio Analytics 2019



Policies

TY Policies 2019	11,828	
This Time Last Year 2018	12,922	↓ -8.47%

Renewals

Policies Created This Year	11,828
Renewals 2018	9,679
Renewals Rate	↑ 74.90%
Policies Created Last Year	12,922
Renewals 2017	5,653
Renewals Rate	43.29%

Claims

YTD Claim Volume	273	↗ 43.68%
This Time Last Year 2018	190	
YTD Claims Paid Value	\$103.0M	↗ 29.47%
This Time Last Year 2018	\$79.54M	

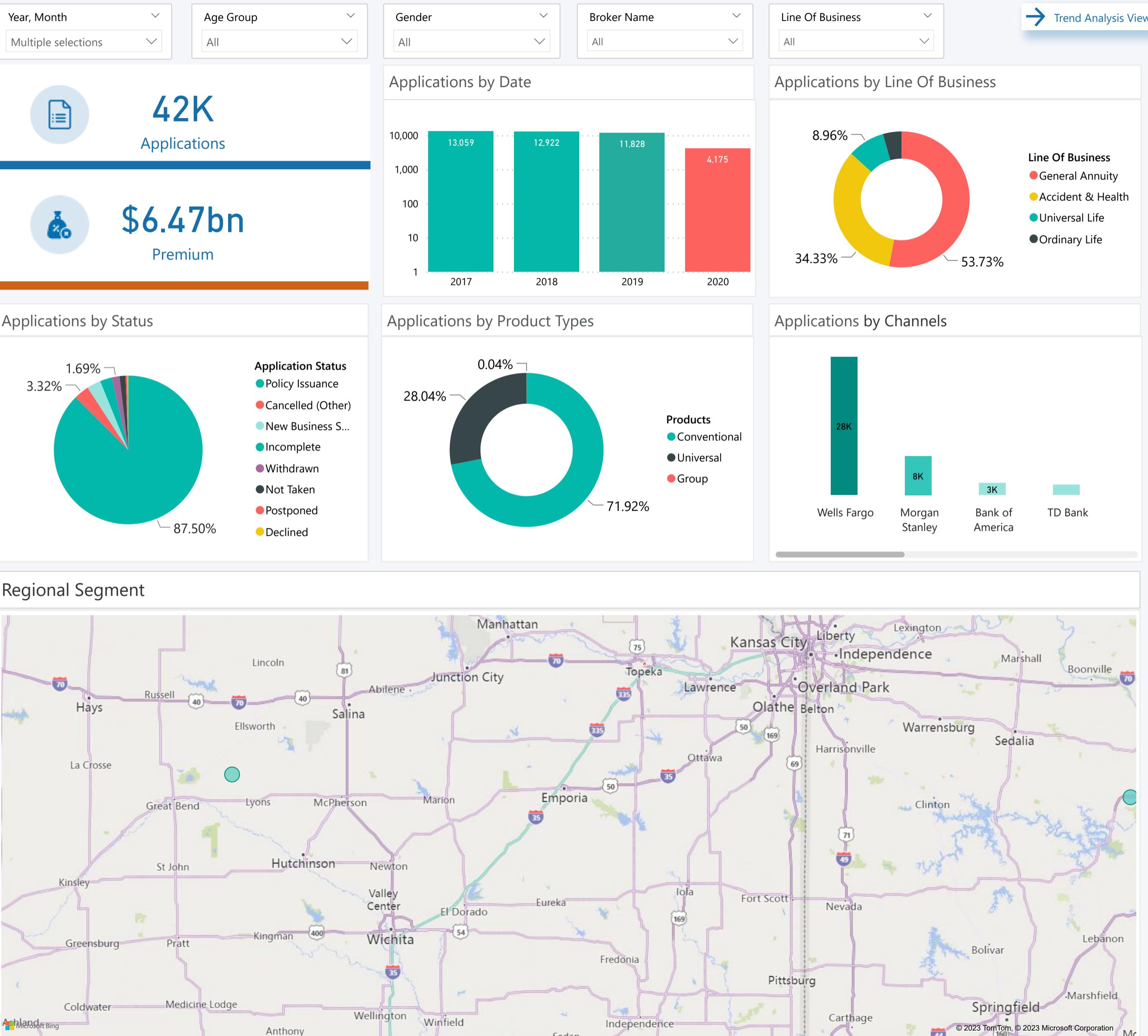
Customer Analytics



Customer Profile

Customer(s)		Cross Sell Opportunity		Customer Lifetime Value																															
 <p>Adrian Fisher</p>		<p>★★★★★ Likely</p>		<p>\$339K</p>																															
		<p>Product(s) Owned</p> <table> <tr> <td>065CHC003 <small>Product Code</small></td> <td>CCSILVER <small>Product Name</small></td> <td>INHOSPITAL</td> </tr> <tr> <td>IGPPA0000 <small>Product Code</small></td> <td>Income Growth Plan ... <small>Product Name</small></td> <td>Investment & Protection Account Plus</td> </tr> <tr> <td>SPR00000N <small>Product Code</small></td> <td>Savings Plan for Retir... <small>Product Name</small></td> <td>Savings Plan for Retirement</td> </tr> </table>		065CHC003 <small>Product Code</small>	CCSILVER <small>Product Name</small>	INHOSPITAL	IGPPA0000 <small>Product Code</small>	Income Growth Plan ... <small>Product Name</small>	Investment & Protection Account Plus	SPR00000N <small>Product Code</small>	Savings Plan for Retir... <small>Product Name</small>	Savings Plan for Retirement	<p>Top Recommended Product(s)</p> <table> <tr> <td>CCSILVER</td> <td>Vision for Retirement</td> </tr> </table>		CCSILVER	Vision for Retirement																			
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CCSILVER	Vision for Retirement																																		
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Male	914-295-0349																																		
Country/State/City	Marital Status	<p>Policy Information</p> <table border="1"> <thead> <tr> <th>Policy Number</th> <th>Product Code</th> <th>Product Name</th> <th>Status</th> <th>Premium Term</th> <th>Payment F</th> </tr> </thead> <tbody> <tr> <td>P9425687</td> <td>065CHC003</td> <td>CCSILVER</td> <td>Terminated- Lapsed no value</td> <td>1</td> <td>12</td> </tr> <tr> <td>P9425688</td> <td>065CHC003</td> <td>CCSILVER</td> <td>Terminated- Lapsed no value</td> <td>1</td> <td>12</td> </tr> <tr> <td>46350637</td> <td>IGPPA0000</td> <td>Income Growth Plan Plus</td> <td>Terminated- Lapsed no value</td> <td>1</td> <td>12</td> </tr> <tr> <td>46350734</td> <td>SPR00000N</td> <td>Savings Plan for Retirement</td> <td>Active Premium Paying</td> <td>13</td> <td>6</td> </tr> </tbody> </table>				Policy Number	Product Code	Product Name	Status	Premium Term	Payment F	P9425687	065CHC003	CCSILVER	Terminated- Lapsed no value	1	12	P9425688	065CHC003	CCSILVER	Terminated- Lapsed no value	1	12	46350637	IGPPA0000	Income Growth Plan Plus	Terminated- Lapsed no value	1	12	46350734	SPR00000N	Savings Plan for Retirement	Active Premium Paying	13	6
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Wisconsin	Single	<p>Total</p>																																	
Remarks	Member Since																																		
	2006-04-10																																		
Date of Birth	2002-01-26	<p>Claim Information</p> <table border="1"> <thead> <tr> <th>Claim Number</th> <th>Policy Number</th> <th>Status</th> <th>Claim Type</th> <th>Reason</th> <th>Payment Date</th> <th>Approved Amount</th> <th>Paid Amount</th> </tr> </thead> </table>				Claim Number	Policy Number	Status	Claim Type	Reason	Payment Date	Approved Amount	Paid Amount																						
Claim Number	Policy Number	Status	Claim Type	Reason	Payment Date	Approved Amount	Paid Amount																												
Address	Wisconsin																																		

New Business Analytics



Policy Analytics

Year, Month ▼

All ▼

Policy Status

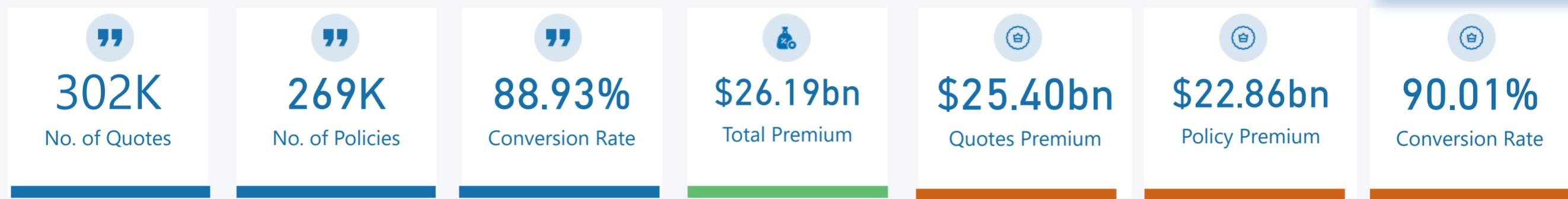
Age Group 

Gender

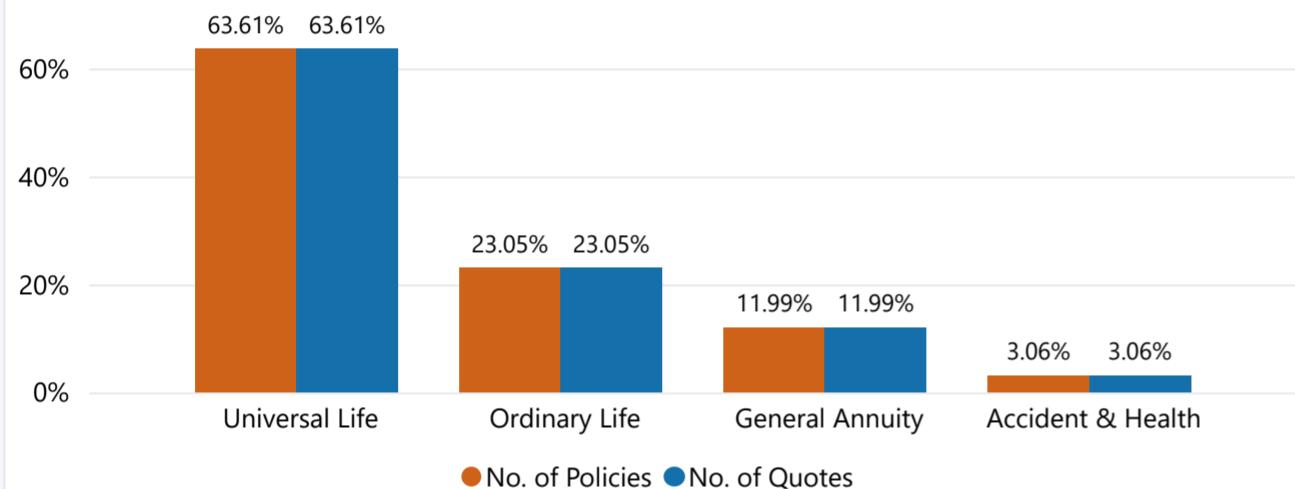
Line Of Business 

→ Customer Mix

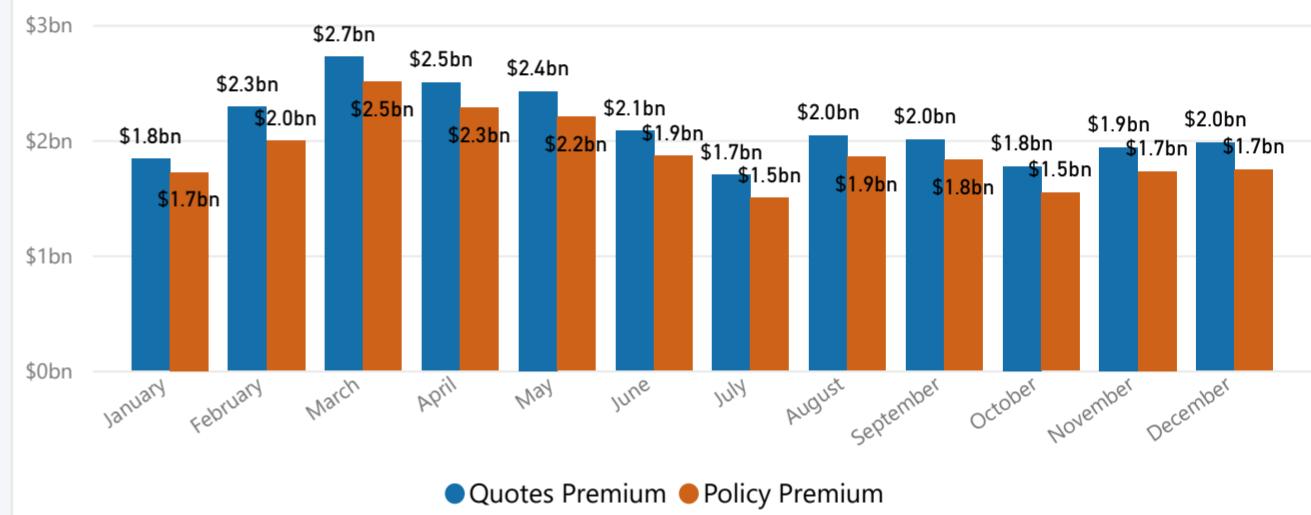
→ Trend Analysis View



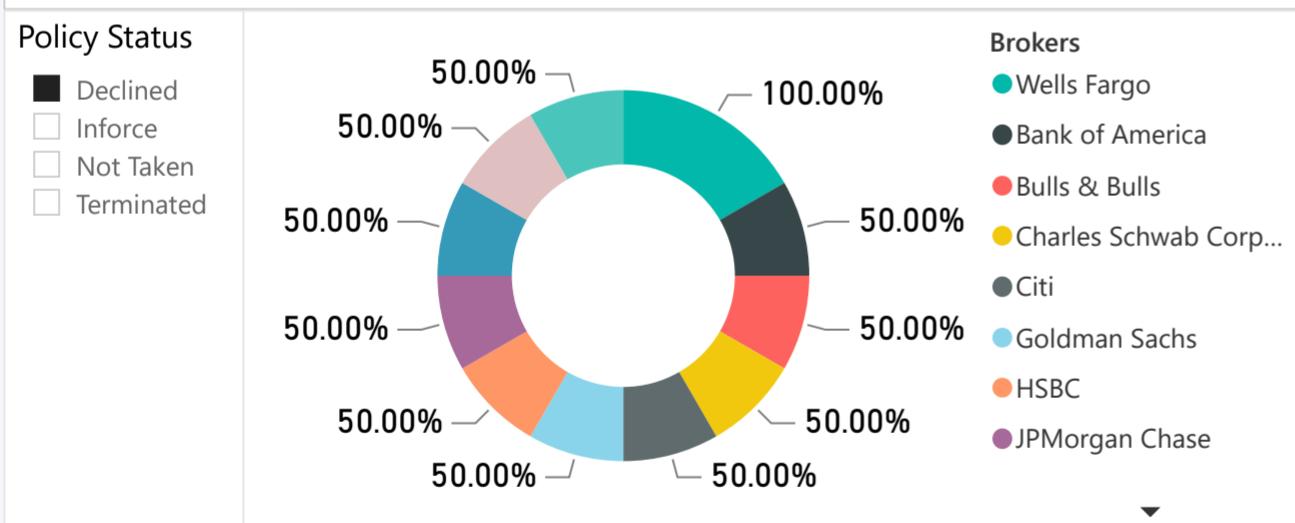
Policy Breakdown by Line of Business



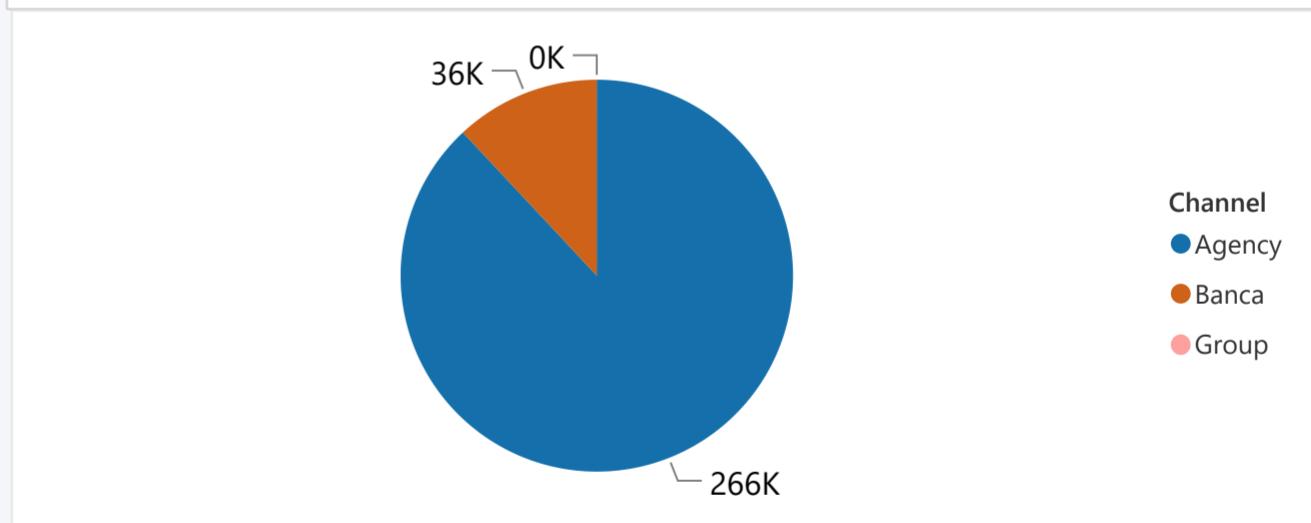
Quote Premium v/s Policy Issued Premium Comparison



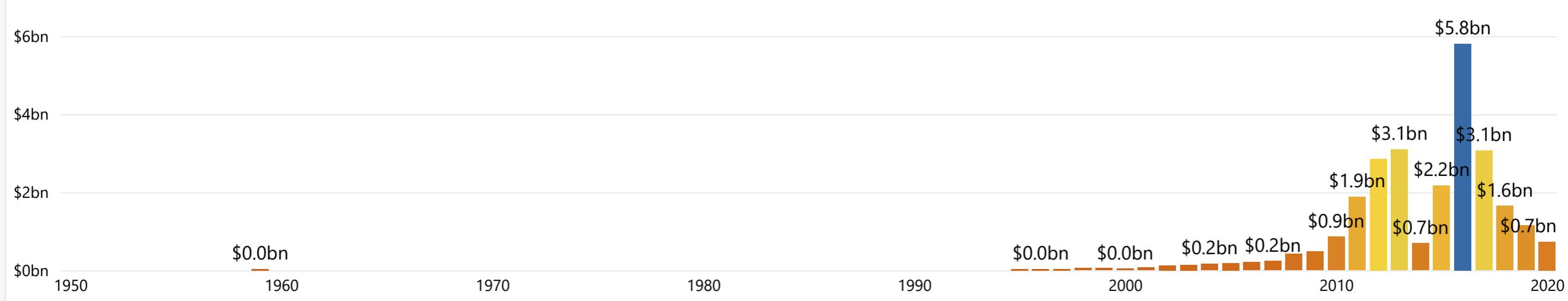
Portfolio Share by Broker



Portfolio Share by Channel



Vintage Analysis by Premium



Broker Analytics

Year, Month Gender Broker Name Line Of Business Product Name

Multiple selections All All All All

 Trend Analysis View



38K

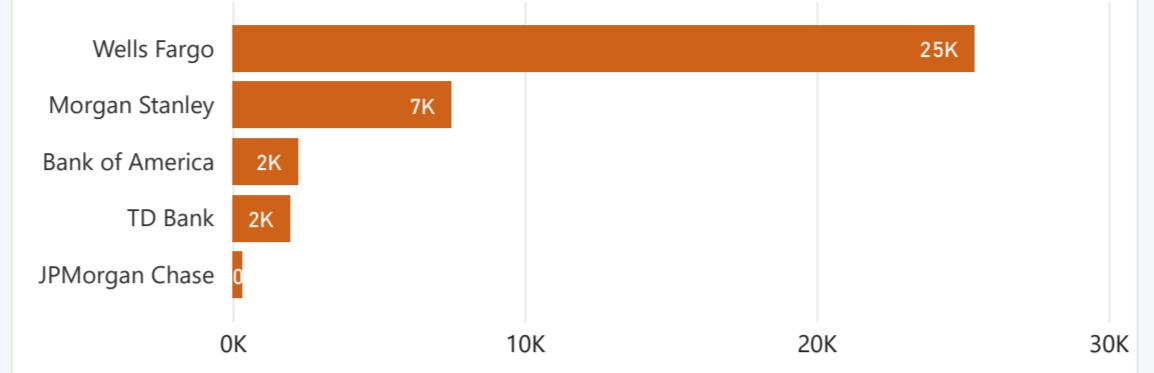
Total Policies



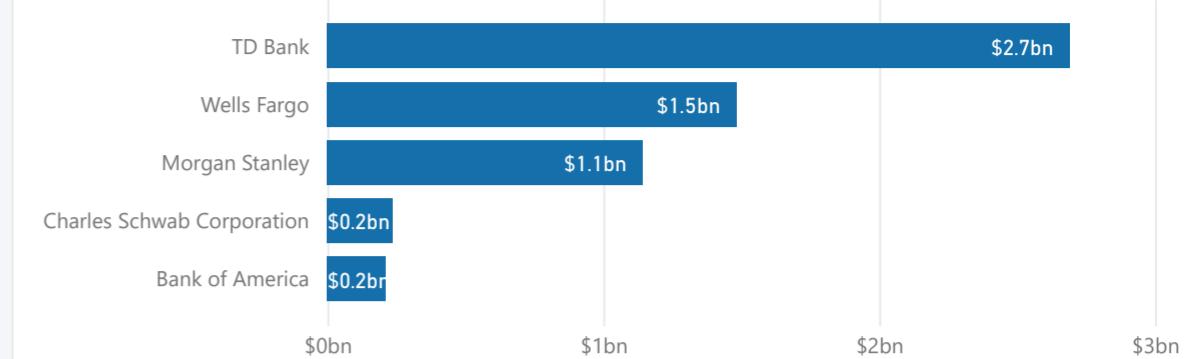
\$5.87bn

Total Premium

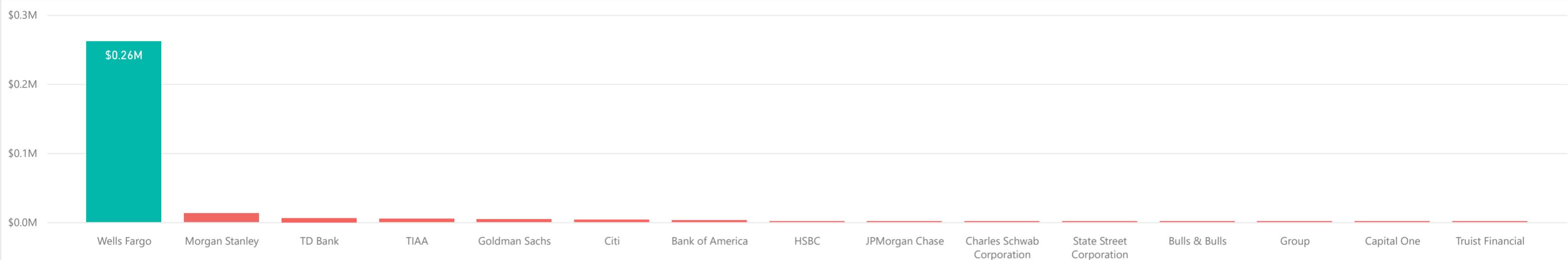
Top 5 Brokers by Policies



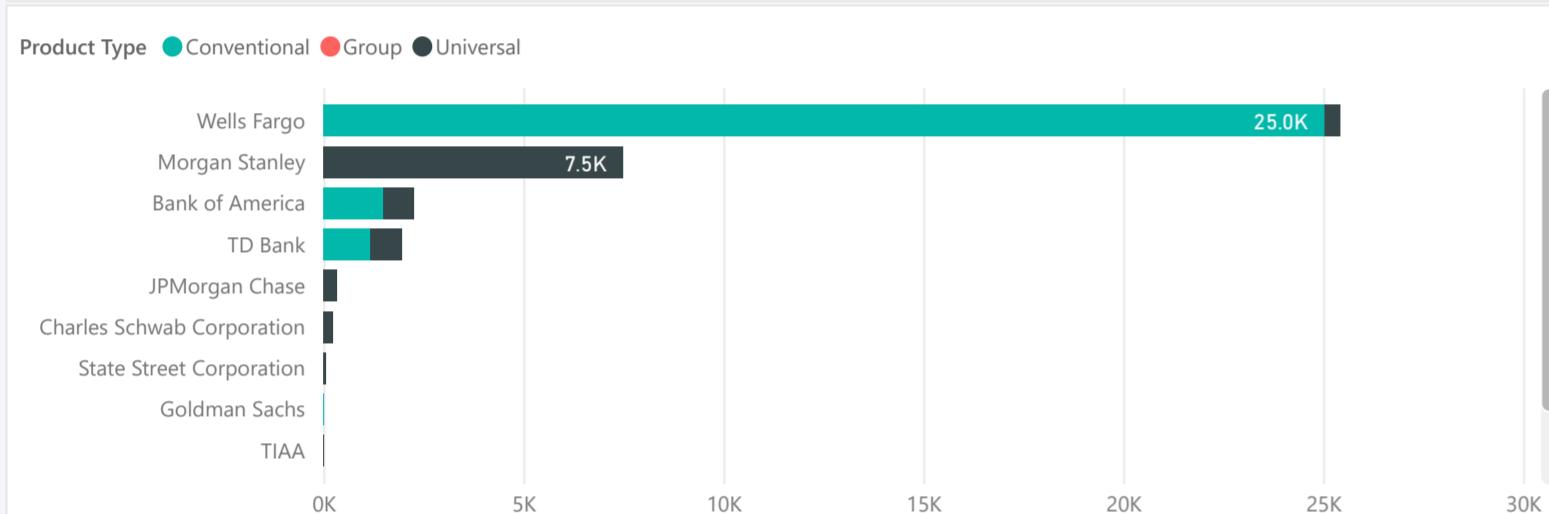
Top 5 Brokers by Premium



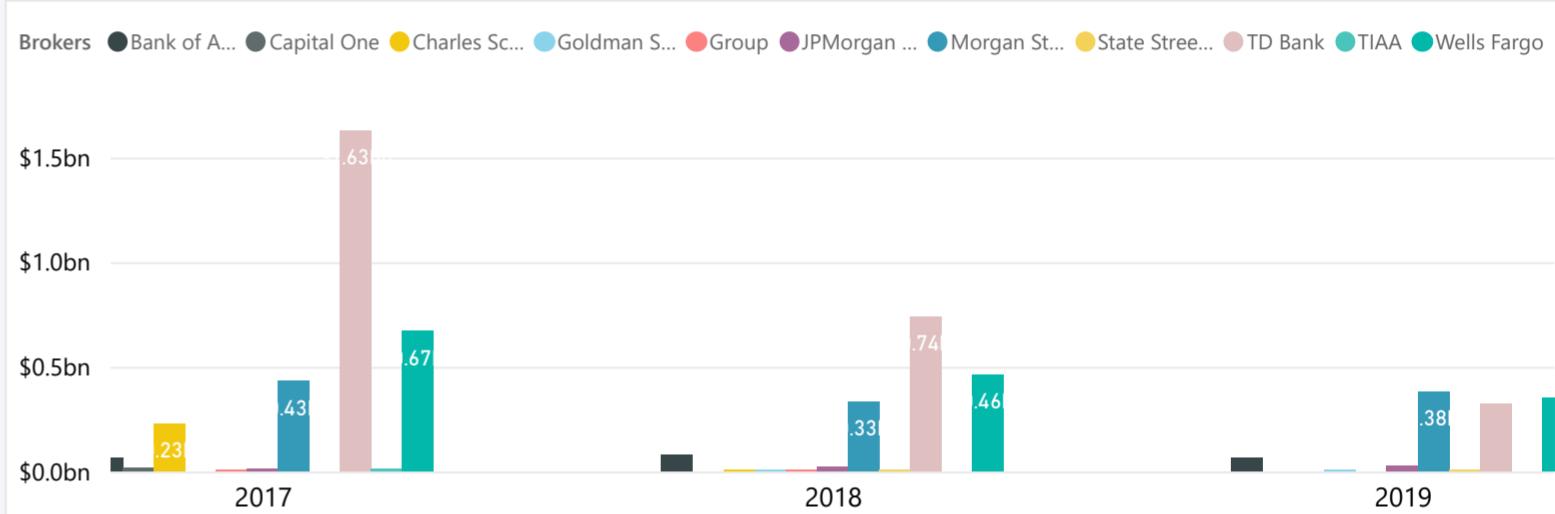
Distribution of Policies Sold by Brokers



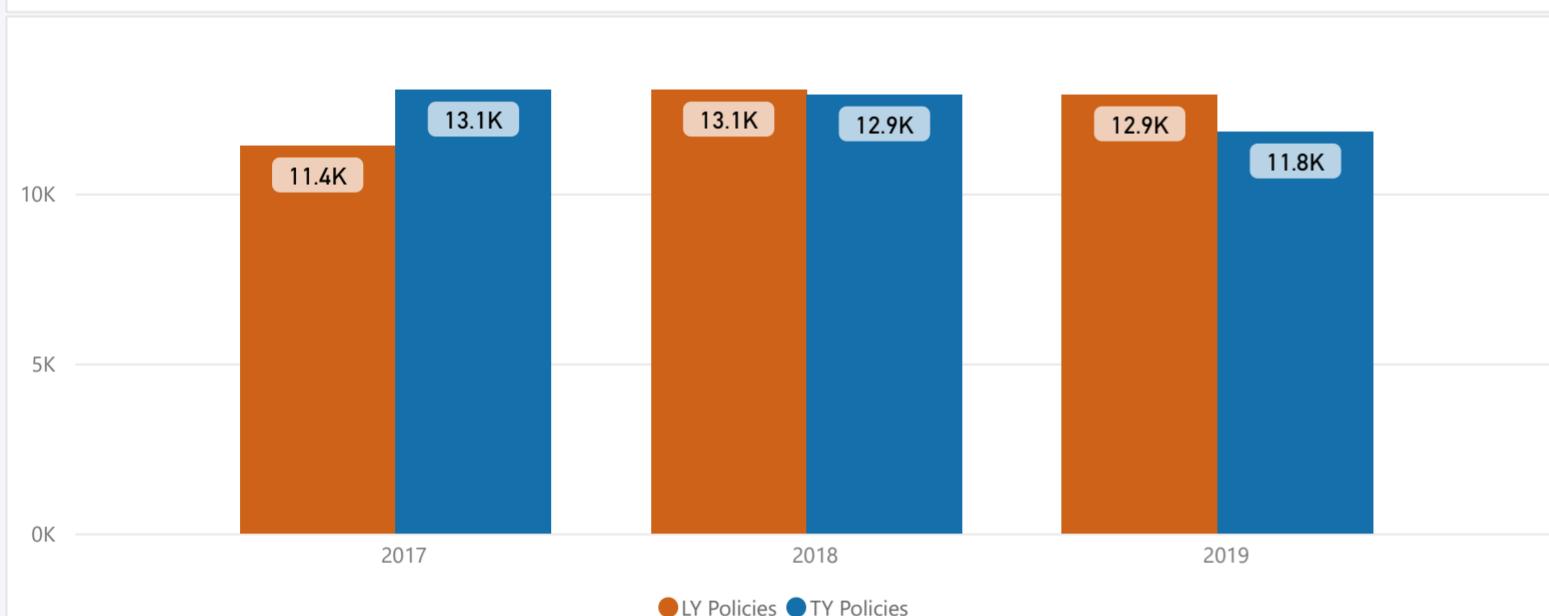
Policy Distribution by Product Type



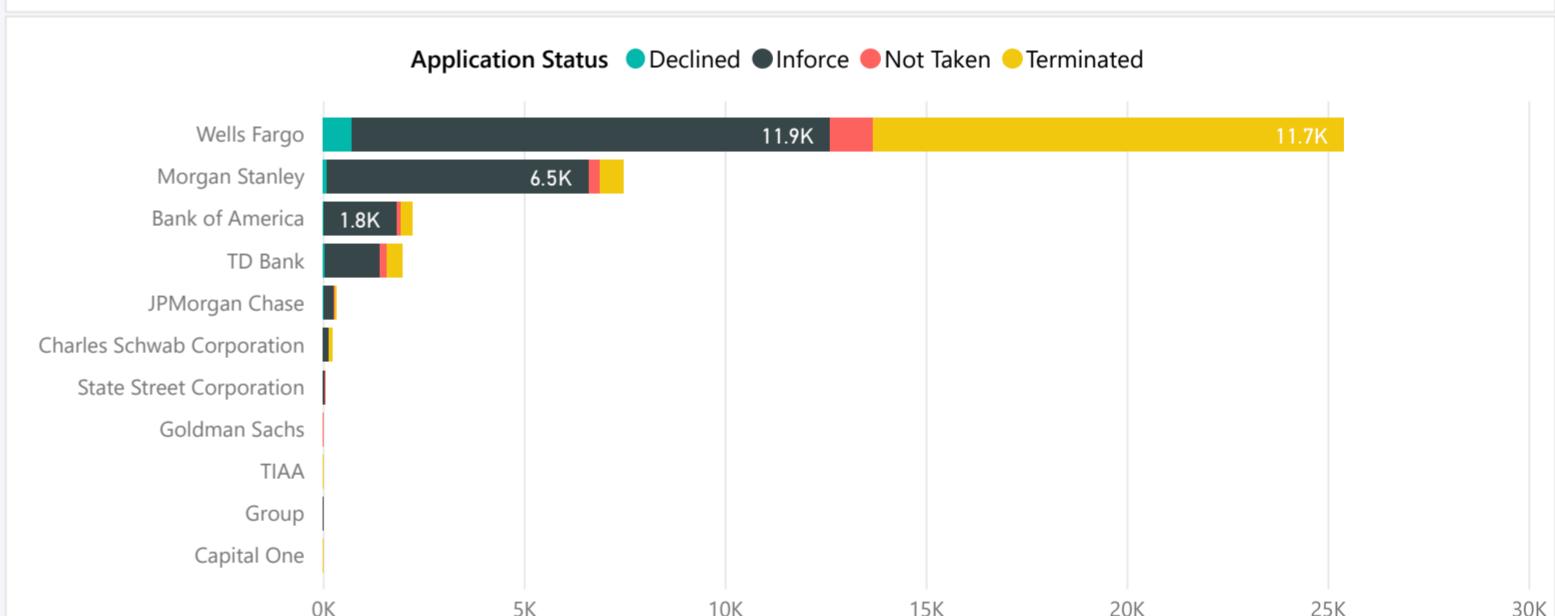
Premium Collection (new/renew)



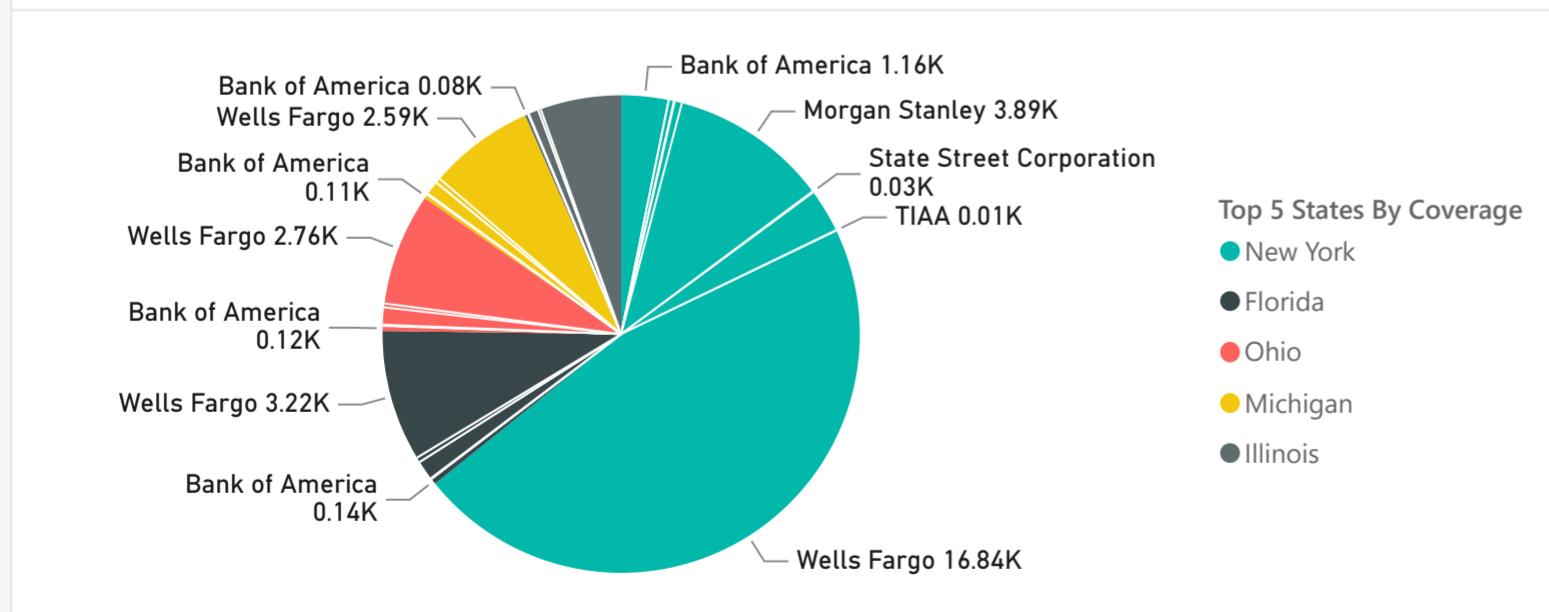
Policies



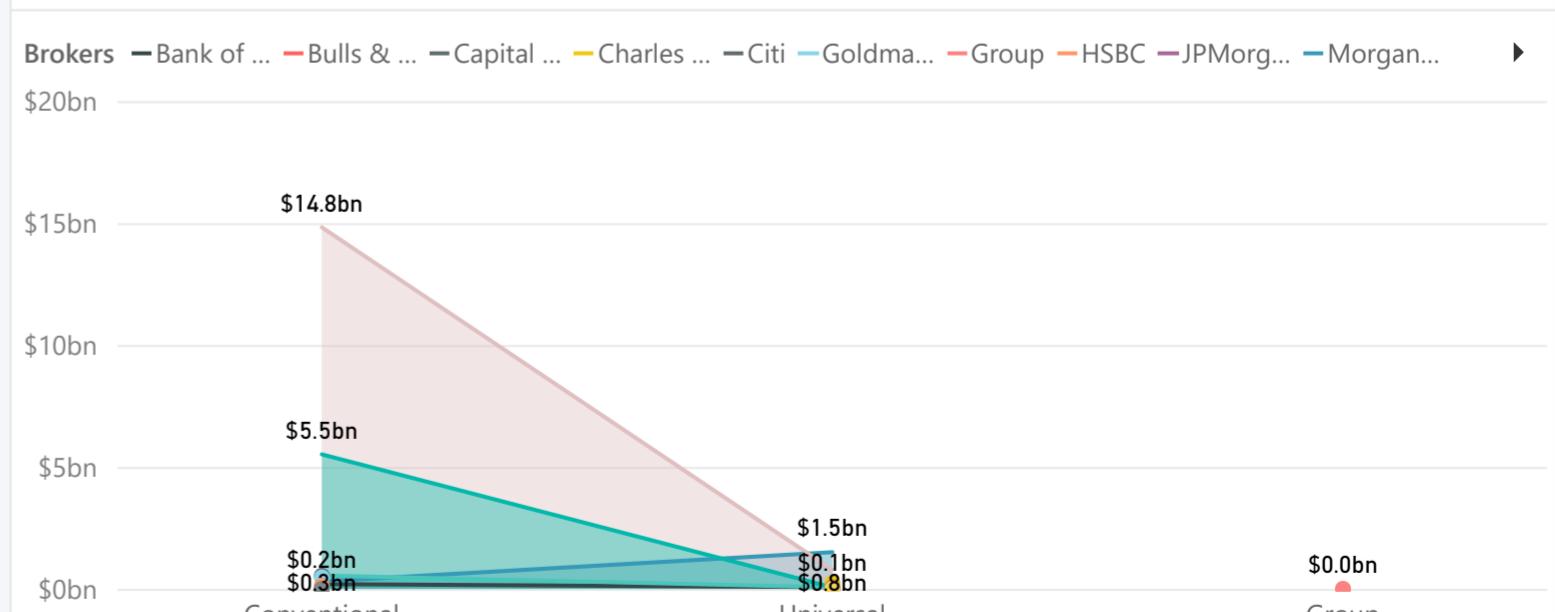
Brokers by Application Status



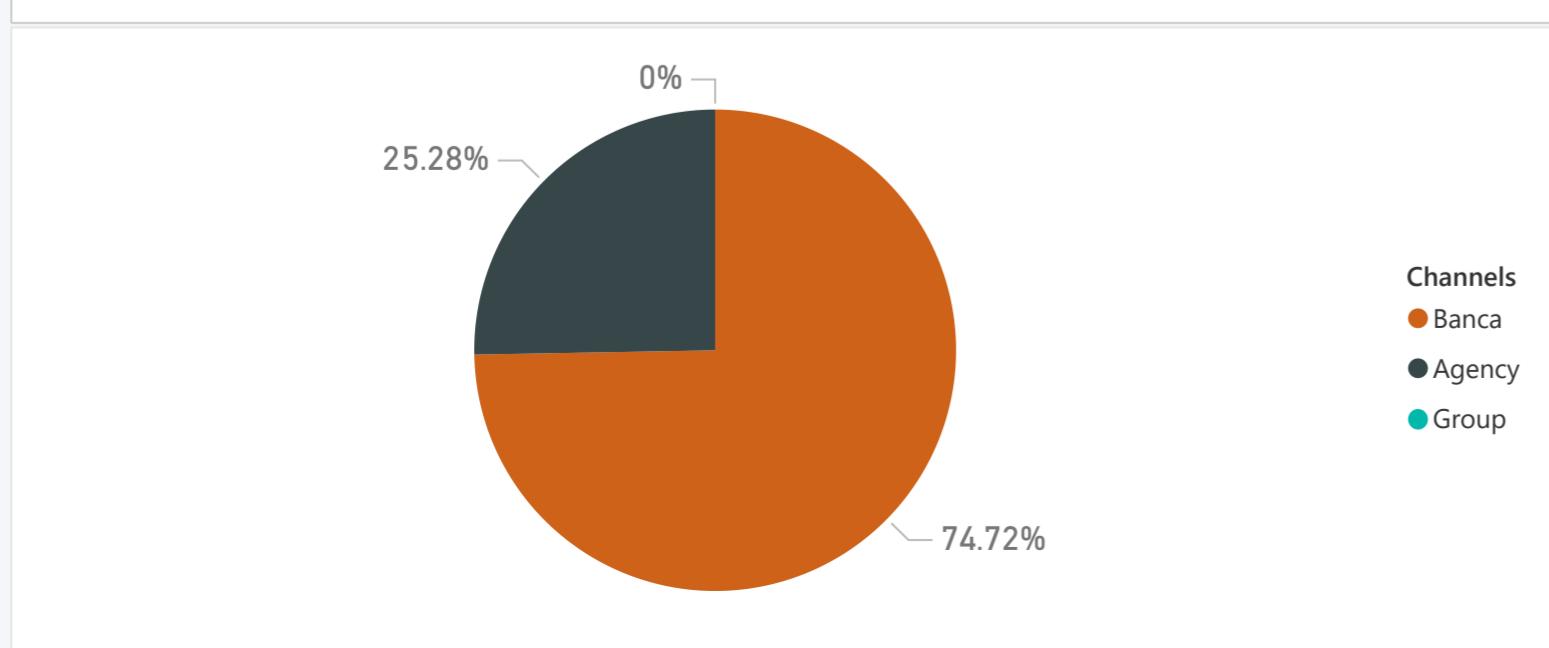
Insured Coverage by States



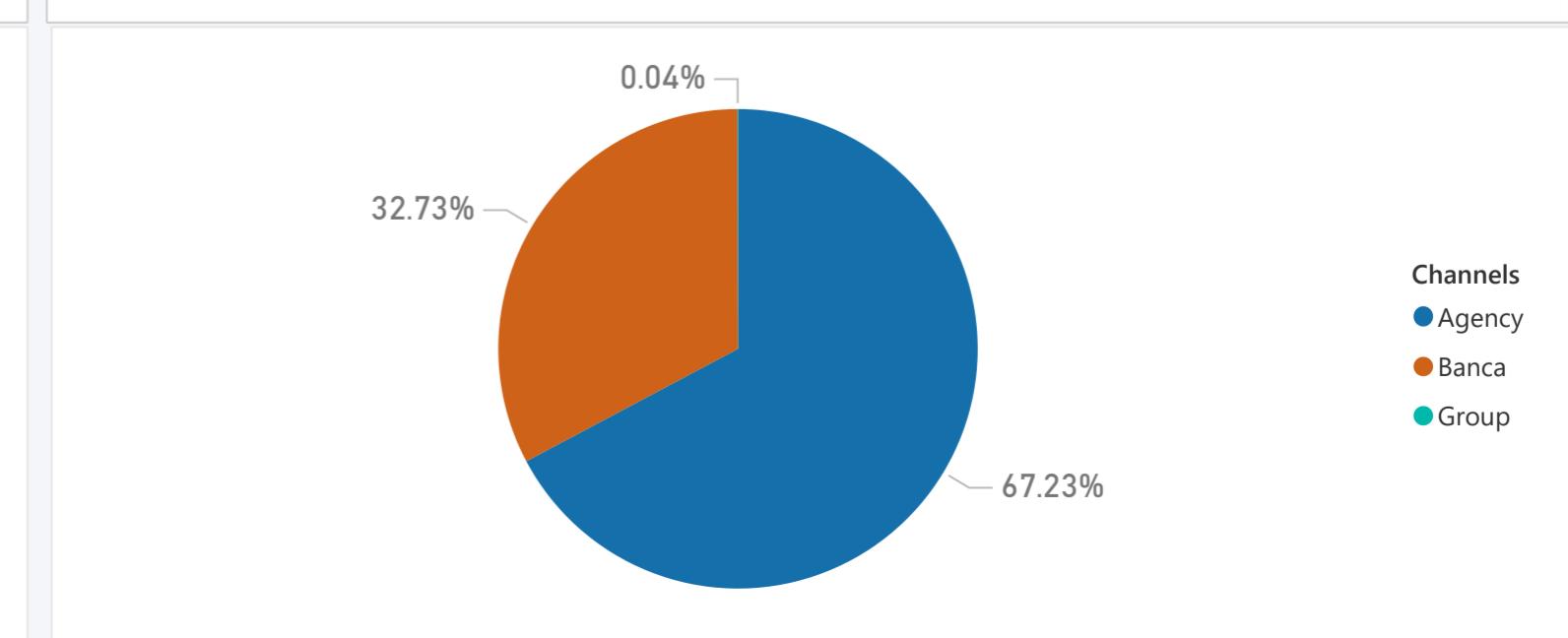
Monthly Premium Revenue by Product



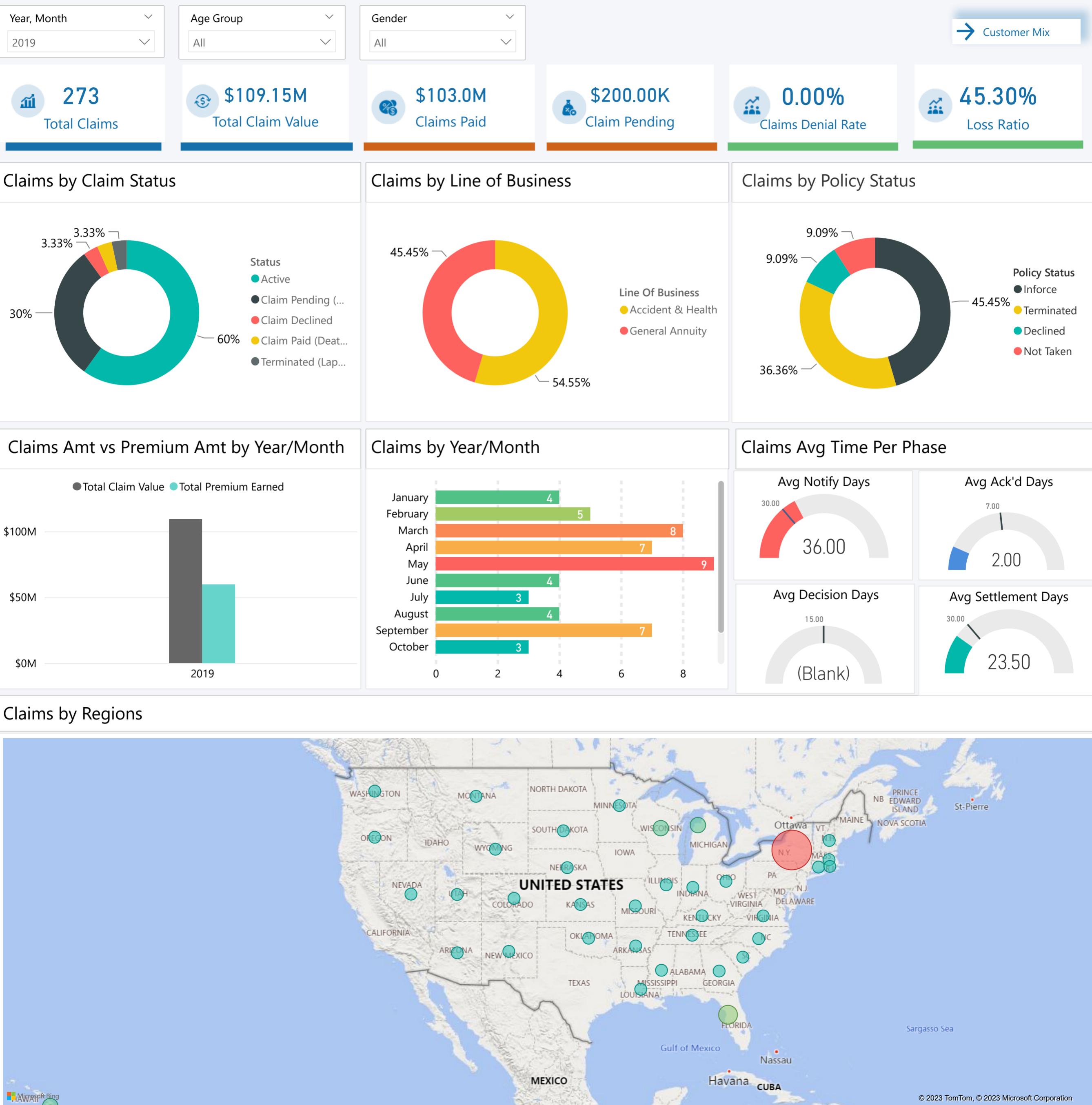
Premium Distribution % by Channel



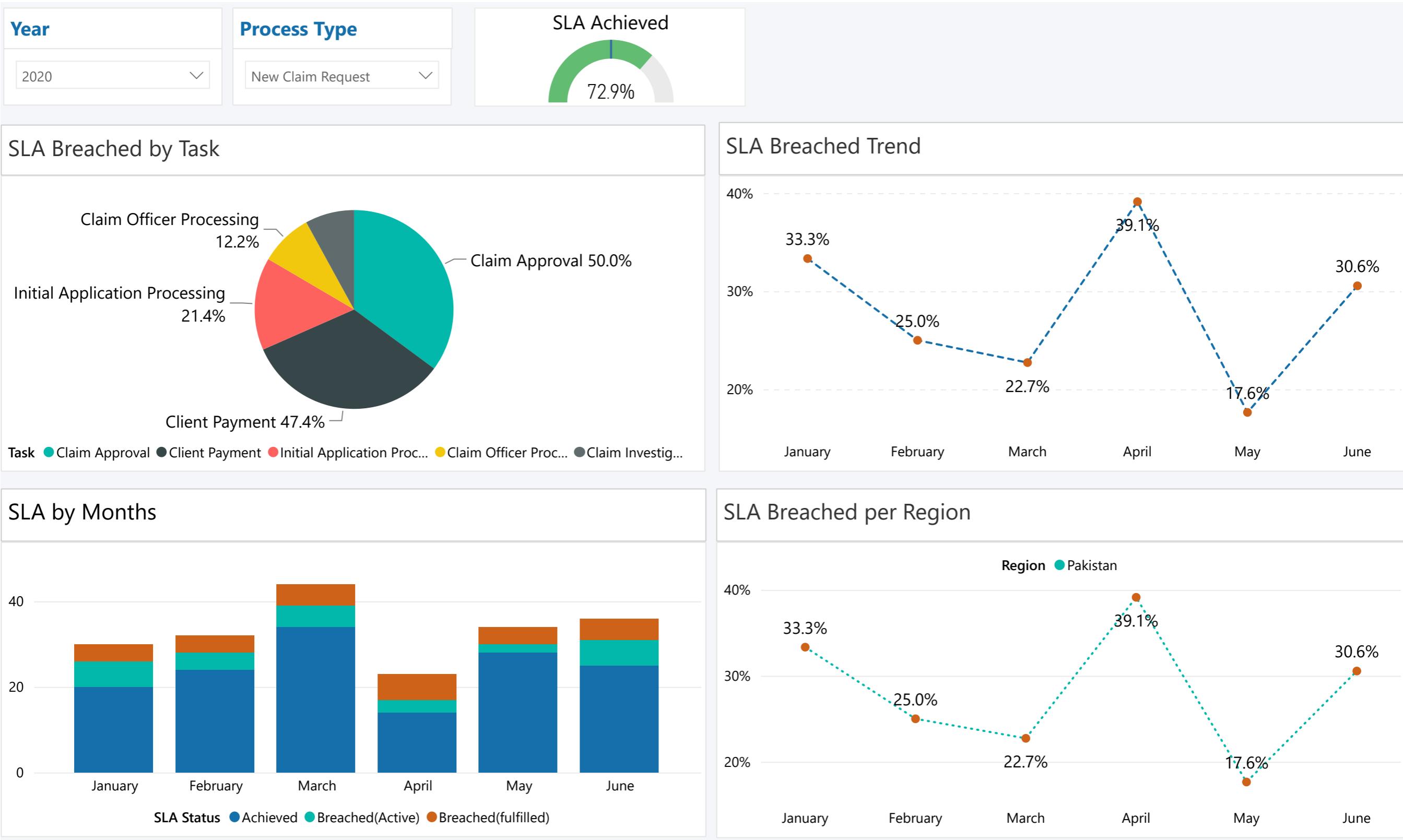
Policies % Sold by Channels



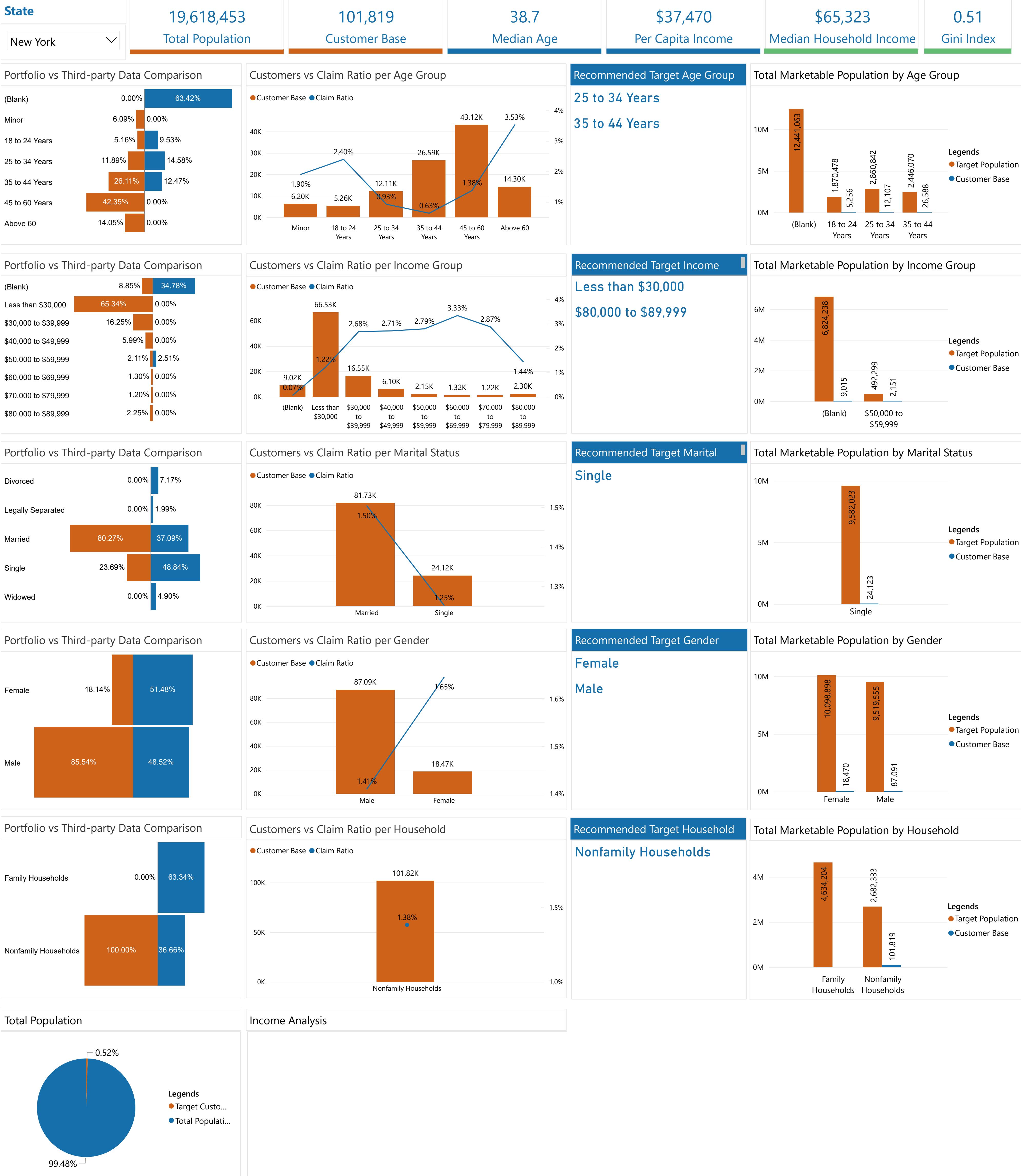
Claim Analytics



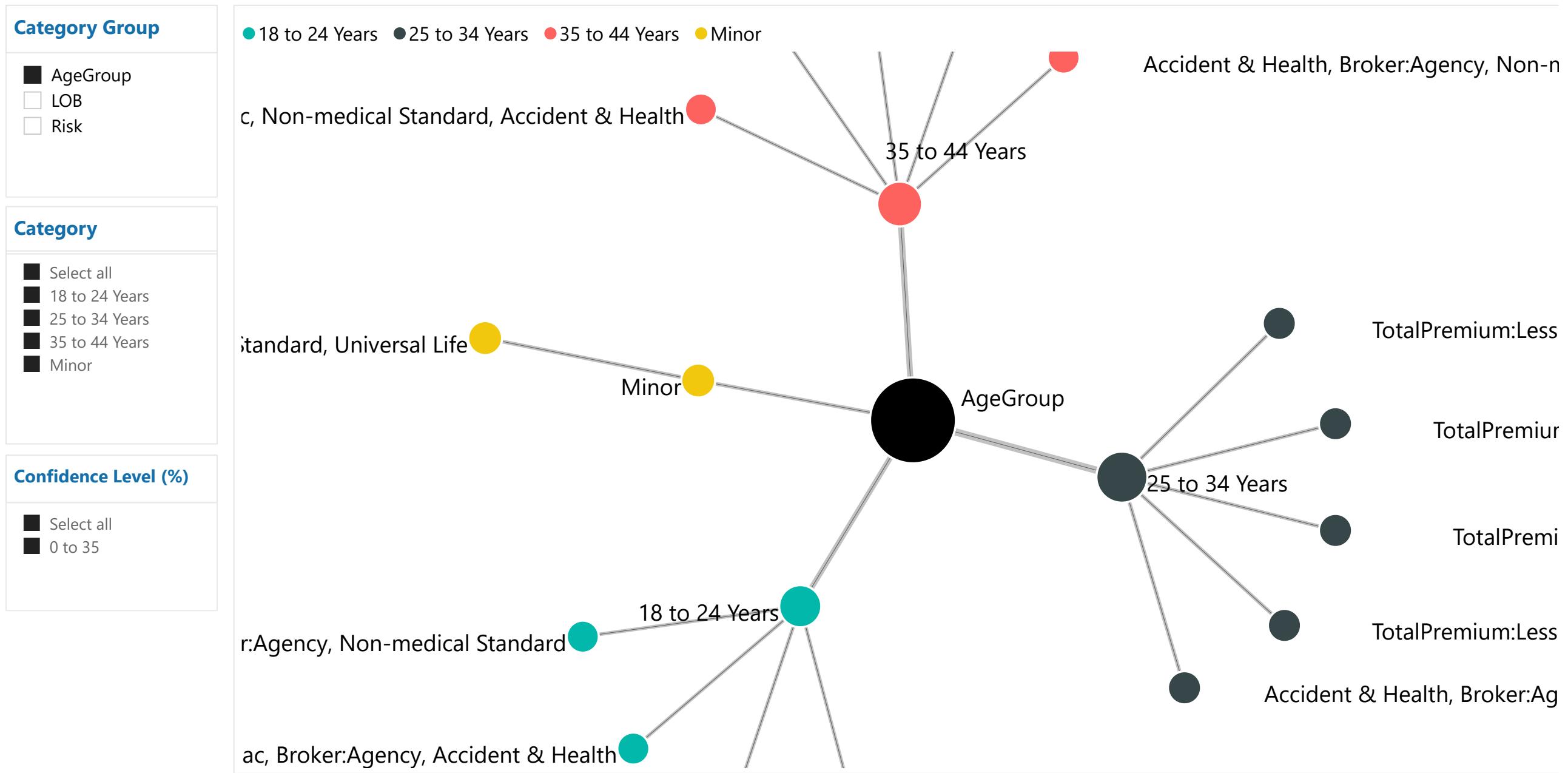
SLA Analytics



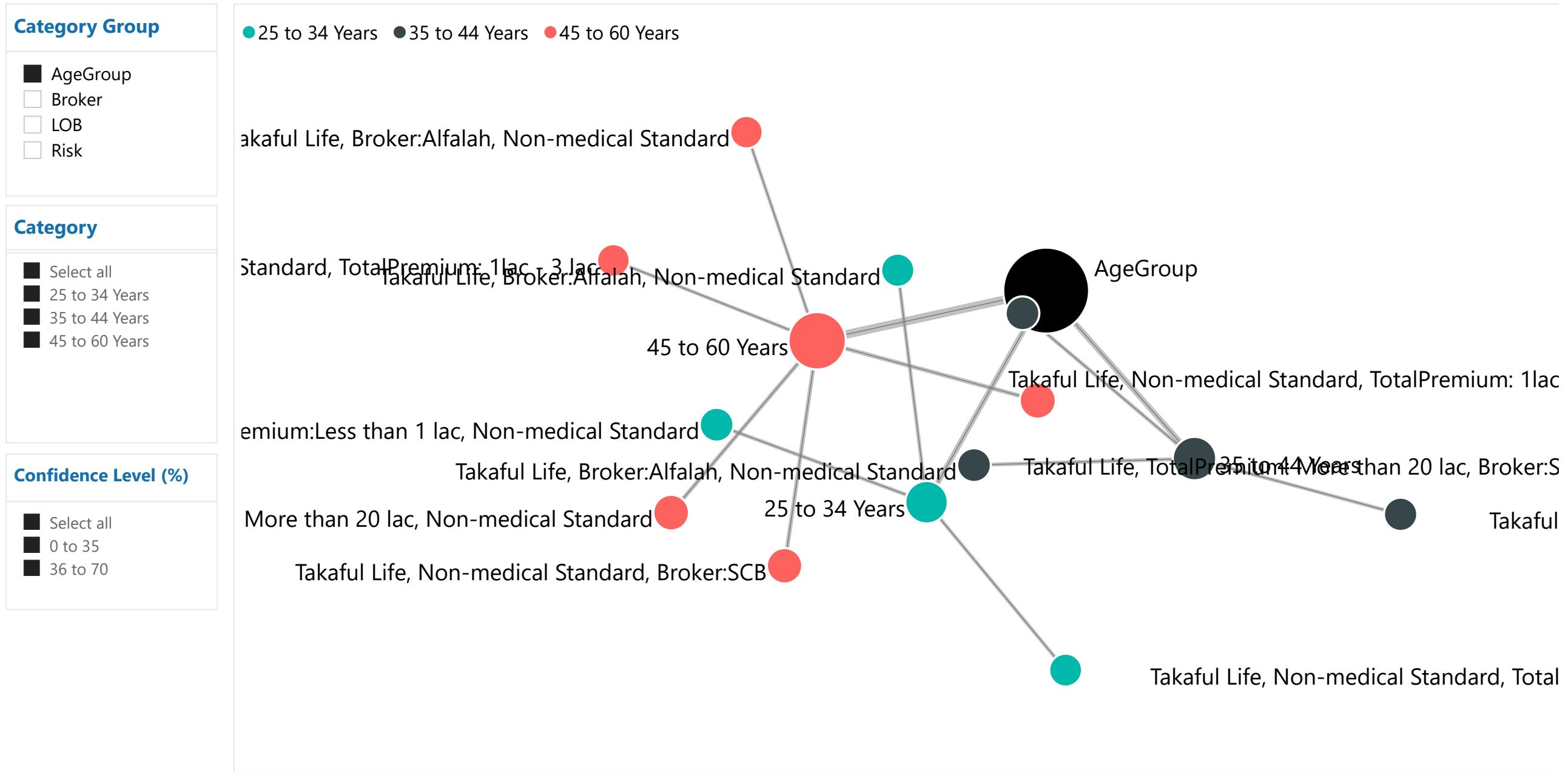
Census Data Analytics - Recommendation Portfolio Engine



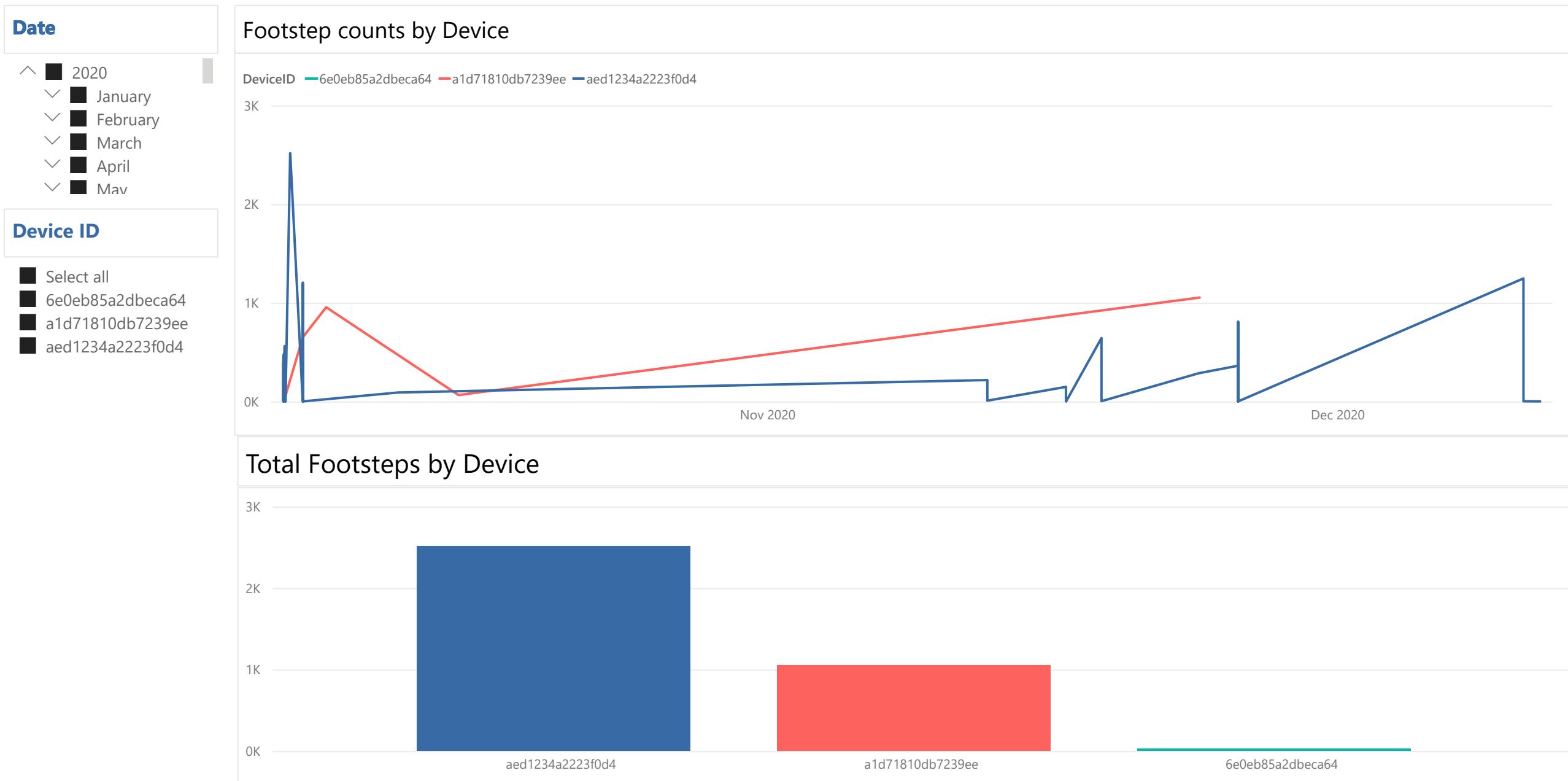
Customer Segmentation - Agency



Customer Segmentation - Banca



IoT Streaming Data Analytics



Sentiment Analytics

Year Sentiments Company Platform

All All All Facebook



8.04M

Like Count



995.14K

Share Count

- Statistical Analytics
- Interest by Region
- Company Presence



16K

Sentiments



34K

Sentiments



52K

Sentiments



15K

Sentiments

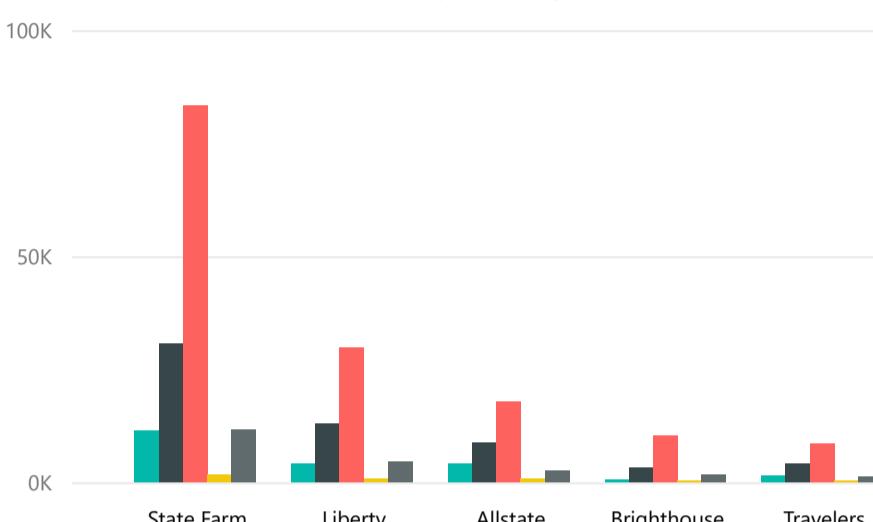


139K

Sentiments

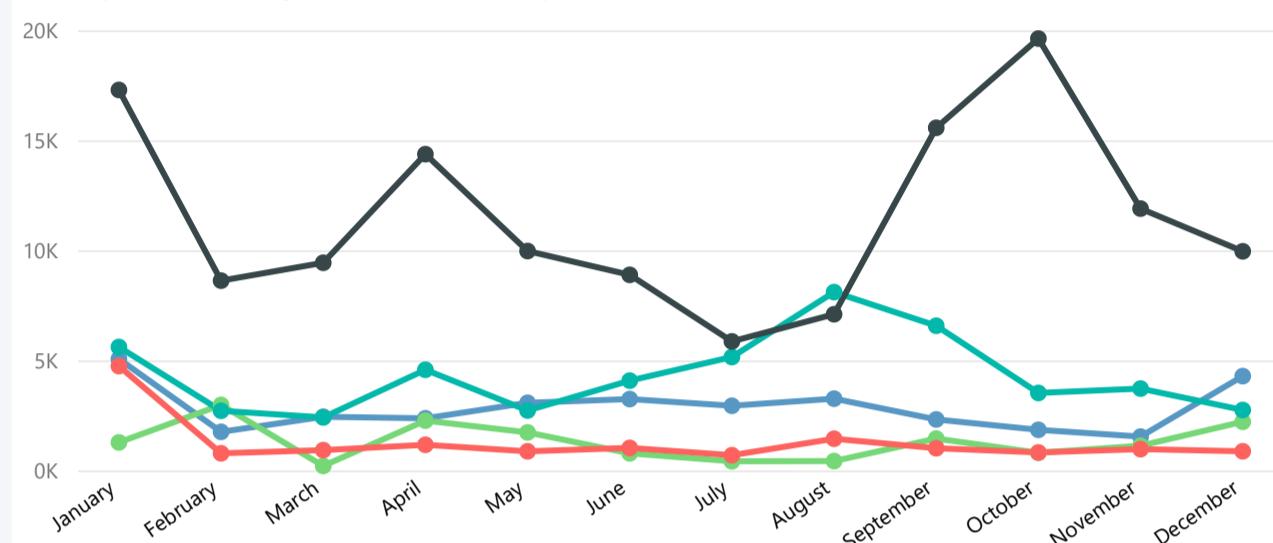
Sentiment Comparison by Company

Sentiments ● Bad ● Good ● Neutral ● Very Bad ● Very Good

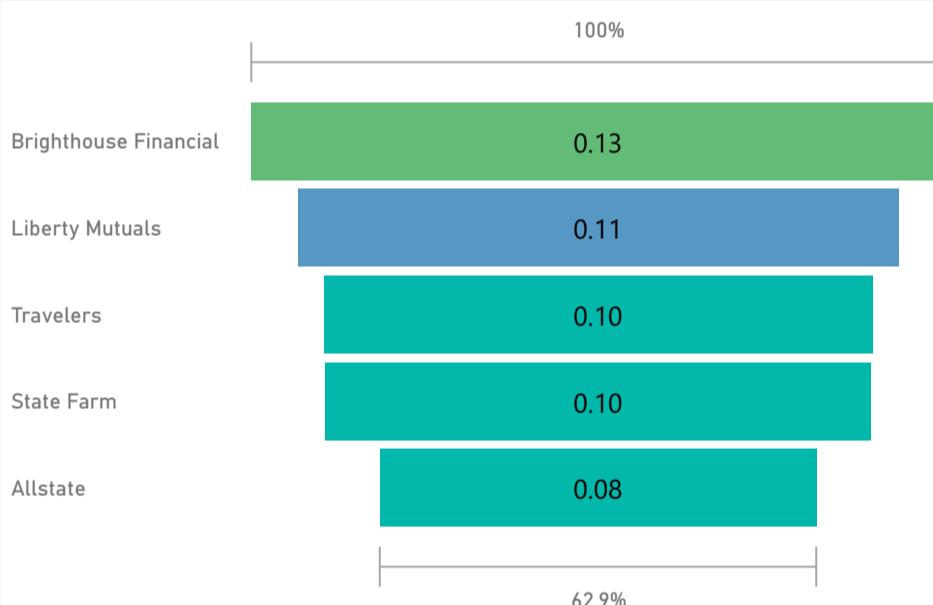


Sentiment Timeline

Company ● Allstate ● Brighthouse Financial ● Liberty Mutuals ● State Farm ● Travelers

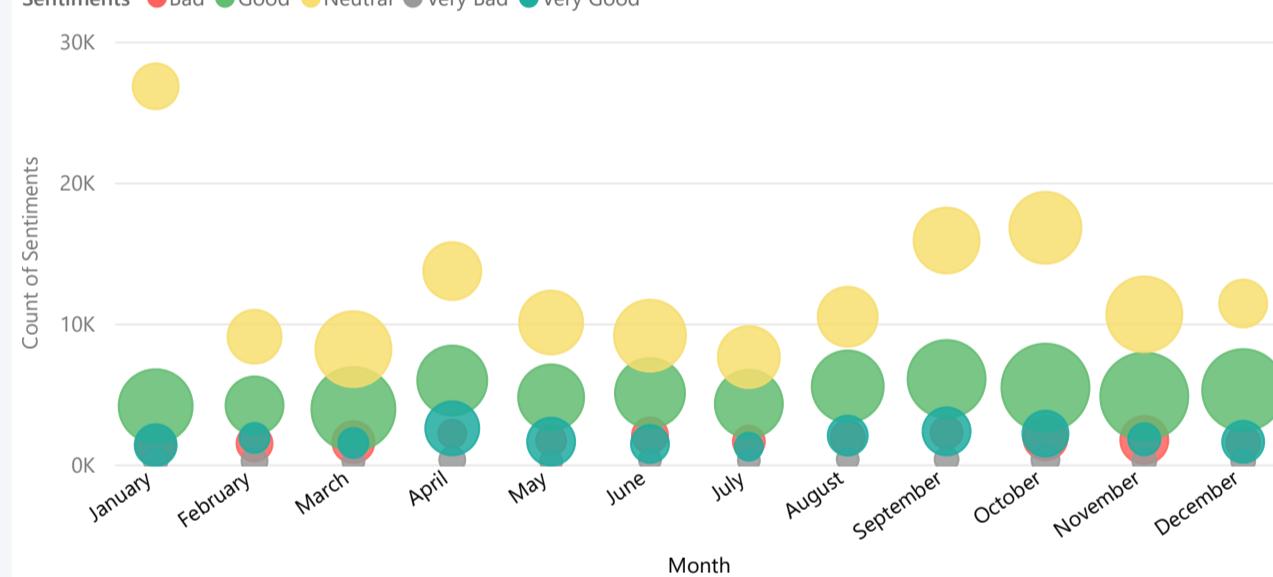


Polarity Score by Company



Likes Trend

Sentiments ● Bad ● Good ● Neutral ● Very Bad ● Very Good

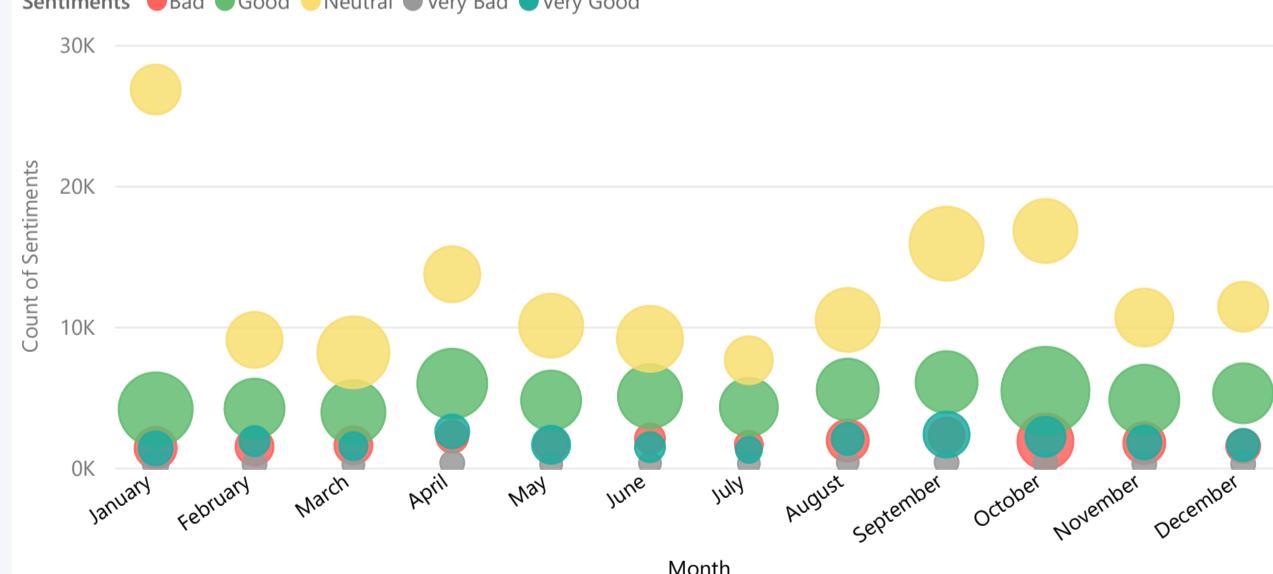


Sentiments Ratio



Share Trend

Sentiments ● Bad ● Good ● Neutral ● Very Bad ● Very Good



Holistic Comparison

Sentiments	Allstate	Brighthouse Financial	Liberty Mutual Insurance	State Farm	Travelers
Bad	4084	468	4028	11318	1360
Good	8729	3117	12857	30615	4070
Neutral	17891	10349	29730	83345	8435
Very Bad	775	52	703	1616	259
Very Good	2598	1613	4557	11647	1121