**Revised Requirements**

**Agency Report → Quotation Status Counts**

**Overview:**The Summary Assistant must analyze agency quotation metrics (e.g., Submission-to-Bind Ratio), highlight bottlenecks (underwriting/error delays), and calculate revenue impact. It should deliver concise, color-coded reports (sorted by revenue) to flag priority follow-ups and inefficiencies, with scalability for future enhancements. **Metrics to Include**:

* Submission-to-Bind Ratio
* Quote-to-Bind Ratio
* Submission-to-Quote Ratio (if applicable)

**Data Requirements**:

* Remove the low-activity agencies, and counts that are present in current output
* Highlight bottlenecks based on delays:

- Delays due to errors

- Delays due to UW

- Delays without any reason

**Formatting Rules**:

* 1 bullet per agency (4–5 lines max).
* Order by revenue (lowest to highest).
* Use color-coding for quick insights (e.g., red for issues).

**Actionable Insights**:

* Identify agencies needing follow-up (low binds, high errors).
* Flag underwriting/process bottlenecks.

**Future Enhancements**:

* Segment by agency size (small/mid/large).
* Add performance targets (if data available).

**Sample Output**:

1. Hylant Insurance:

Submission-to-Bind Ratio: 15% (99 Submissions, 15 Bound)

Quote-to-Bind Ratio: 50% (30 Quoted, 15 Bound)

Submission-to-Quote Ratio: 30% (99 Submissions, 30 Quoted)

Bottlenecks: Underwriting delays: X | Errors: Y | Unknown delays: Z

Revenue lost due to bottlenecks: $12,850

1. Alliant Insurance Service:

Submission-to-Bind Ratio: Submissions: 75 | Bound: 30 (40% bind ratio)

Bottlenecks: Underwriting delays: 8 | Errors: 4 | Unknown delays: 3

Revenue lost due to bottlenecks: $5,200

**Revised Requirements: Web Analytics → Page Views Summary**

**Overview**

The **Summary Assistant** should summarize website performance using page view metrics and user engagement. It should:

* Highlight traffic trends, peaks, and drops
* Identify **problem pages** (high bounce, low time-on-page)
* Quantify **impact on conversions**
* Provide short, color-coded summaries for key pages/sources

**Metrics to Include**

For each top-performing or underperforming page/source:

* **Total Page Views**
* **Average Session Duration**
* **Traffic Source**

**Data Requirements**

* Filter out **low-traffic pages/sources**
* Detect **anomalies** in traffic trends (e.g., sudden drop/rise)
* Highlight:
  + **High bounce rates**
  + **Short sessions**
  + **Conversion drop-offs**

**Formatting Rules**

* 1 bullet per key page/source (max 4–5 lines)
* Sort by **conversion impact** or **traffic volume**
* Use **color-coding**:
  + High bounce / poor engagement
  + Moderate engagement
  + Strong engagement and conversion

**Actionable Insights**

* Flag pages for optimization (e.g., high bounce)
* Identify top-converting sources
* Suggest areas for content/UI improvement

**Future Enhancements**

* Segment by **device type** (mobile/desktop/tablet)
* Add **user journey paths**
* Integrate A/B test performance metrics

**Sample Output**

1. **/product-page**  
   Page Views: **8,500**  
   Avg. Session Duration: **00:19**, Conversions: **0.8%**  
   Traffic Source: **Organic**  
   High bounce, low conversion — review page layout or content.
2. **/pricing**  
   Page Views: **5,200**  
   Avg. Session Duration: **01:23**, Conversions: **2.1%**  
   Traffic Source: **Paid Search**  
   Decent engagement but conversion below average for paid traffic.
3. **/blog/how-to-compare-insurance**  
   Page Views: **6,900**  
   Avg. Session Duration: **03:44**, Conversions: **3.9%**  
   Traffic Source: **Referral**  
   Excellent performance — consider linking this to pricing/product pages.

Quote Response Time Summary

Column Definitions:

QuoteResponseTime: Time taken to provide a quote (in minutes)

QuoteNumber: Unique ID of the quotation

NumberOfBuildings: Count of buildings linked to the quotation

NumberOfLocations: Count of locations linked to the quotation

Task:

- For each quote, calculate the response time threshold as: Threshold = NumberOfBuildings \* NumberOfLocations \* 1.50 minutes

- Determine how many quotes exceed their individual threshold. Report the percentage in the format: "X% of quotes (X/Y) exceeded the response time threshold."

- Show the top 5 quotes with the highest response times, formatted as: QuoteNumber: ResponseTime (NumberOfBuildings building, NumberOfLocations location)

- Summarize findings and suggest improvements only if any quotes exceeded their threshold.

Output Requirements:

Format the output exactly as shown in the sample. Do not include extra commentary, explanations, or processing notes. Do not include \* or '

Sample Output:

Quote Response Time Summary

"28% of quotes (7/25) exceeded the response time threshold."

Threshold: 1.50 min per building, per location

Top Exceeding Quotes:

QQ879410000 : 9.20 min (2 building, 3 location)

QQ7565810000: 7.50 min (2 building, 2 location)

QQ8059710000: 5.60 min (2 building, 1 location)

QQ2291010000: 4.90 min (1 building, 2 location)

QQ2407810000: 4.20 min (1 building, 2 location)

Several quotes exceeded their allocated response time based on the calculated threshold. Investigate areas of delay and improve operational efficiency for complex quotes.