**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

DECLARE @RC int;

DECLARE @StartDate DateTime = DATEADD(DAY, -1, SYSDATETIME());

DECLARE @EndDate DateTime = SYSDATETIME();

DECLARE @LOB NVARCHAR(50) = NULL;

DECLARE @Percentile int = 15;

DECLARE @TenantId INT = 8;

-- TODO: Set parameter values here

EXECUTE @RC = [dbo].[GetQuotationCountsAssistantPrompt]

@StartDate,

@EndDate,

@LOB,

@Percentile,

@TenantId;

UW Response Time Summary

The uploaded dataset contains the following columns:

QuoteNumber: Unique identifier for each quote (QQ)

UWName: Name of the underwriter responsible for the quote

TimeTakenInDays: Time taken by the underwriter to act on the policy, in days

PremiumAmount: Premium amount received for the corresponding quote

Task:

Analyze underwriter response times and summarize the results in two sections:

1. Top Underwriters Contributing to Delays:

- Group underwriters based on their response times:

Longest Delays: Any quotes where TimeTakenInDays > 5

Moderate Delays: Quotes with TimeTakenInDays > 2 and <= 5

Ignore quotes with TimeTakenInDays <= 2

- For each underwriter in each category, display:

Underwriter name

Delay type (Longest delays or Moderate delays)

Delay durations in parentheses (list of days in descending order)

Total Premium Amount across their listed quotes in the format: ($ Total Premium Amount)

- Sort underwriters in descending order of their maximum delay

2. QQ Response Times (Descending Order):

- List all quotes where TimeTakenInDays > 2

- Sort them in descending order of TimeTakenInDays

- For each quote, display:

QuoteNumber ($ PremiumAmount) – X days (Underwriter: UWName)

Output Requirements:

- Do not include quotes with TimeTakenInDays <= 2 in any section

- Format the output exactly as shown in the sample.

- Do not include extra commentary, explanations, or processing notes. Do not include \* or '

- Follow the example format strictly

Expected Output Example:

Top Underwriters Contributing to Delays:

Selena – Longest delays (12 & 11 days); ($0)

XYZ – Moderate delays (5 & 5 days); ($800)

ABC – Moderate delays (4 days); ($1350)

QQ Response Times (Descending Order):

QQ1458810000 ($0) – 12 days (Underwriter: Selena)

QQ1625810000 ($0) – 11 days (Underwriter: Selena)

QQ7623610000 ($0) – 6 days (Underwriter: Selena)

QQ7874110000 ($800) – 5 days (Underwriter: XYZ)

QQ7977110000 ($0) – 5 days (Underwriter: XYZ)

QQ8061610000 ($1350) – 4 days (Underwriter: ABC)