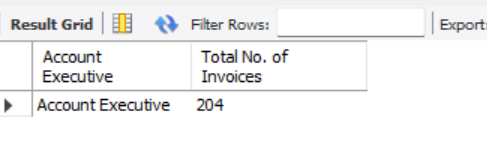
**SQL QUERIES**

use insuranceproject;

# KPI:1 - Number of Invoices by Account Executive:

SELECT 'Account Executive', COUNT (\*) AS 'Total No. of Invoices'

FROM invoice;



# KPI2: Yearly Meeting Count:

SELECT

YEAR(STR\_TO\_DATE(meeting\_date, '%Y-%m-%d')) AS year,

COUNT(\*) AS meeting\_count

FROM

meeting

WHERE

meeting\_date IS NOT NULL

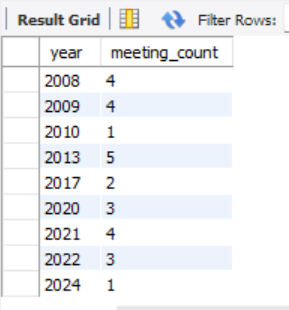
AND STR\_TO\_DATE(meeting\_date, '%Y-%m-%d') IS NOT NULL

GROUP BY

YEAR(STR\_TO\_DATE(meeting\_date, '%Y-%m-%d'))

ORDER BY

year;



# KPI3.1: Cross Sell--Target, Achive, new

SELECT

'Cross Sell' AS KPI\_Type,

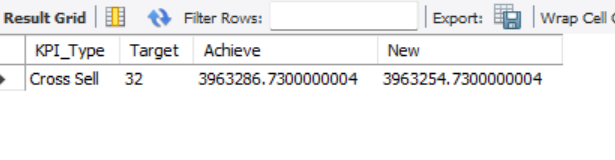
COUNT(DISTINCT policy\_number) AS Target, -- Count of distinct policies for target

SUM(Amount) AS Achieve, -- Total amount achieved (revenue)

SUM(Amount) - COUNT(DISTINCT policy\_number) AS New -- New calculation (difference between target and achieve)

FROM brokerage

WHERE renewal\_status = 'Endorsement'; -- Cross Sell policies are typically marked as 'Endorsement'



## KPI3.2: New-Target,Achive,new

SELECT

'New' AS KPI\_Type,

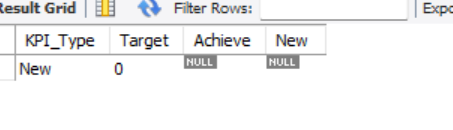
COUNT(DISTINCT policy\_number) AS Target, -- Count of distinct 'New' policies for target

SUM(Amount) AS Achieve, -- Total amount for 'New' policies

SUM(Amount) - COUNT(DISTINCT policy\_number) AS New -- New calculation (difference between target and achieve)

FROM brokerage

WHERE renewal\_status = 'New'; -- Filter for policies marked as 'New'



# KPI3.3 Renewal-Target, Achive,new

SELECT

'Renewal' AS KPI\_Type,

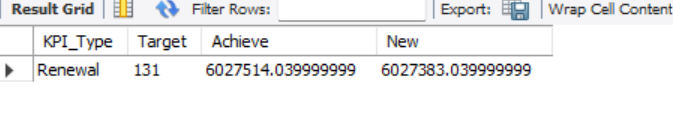
COUNT(DISTINCT policy\_number) AS Target, -- Count of distinct 'Renewal' policies for target

SUM(Amount) AS Achieve, -- Total amount for 'Renewal' policies

SUM(Amount) - COUNT(DISTINCT policy\_number) AS New -- New calculation (difference between target and achieve)

FROM brokerage

WHERE renewal\_status = 'Renewal'; -- Policies marked as 'Renewal'

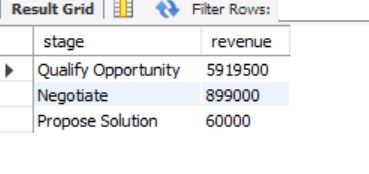


# KPI4: Stage Funnel by Revenue:

SELECT stage, SUM(revenue\_amount) AS revenue

FROM opportunity

GROUP BY stage;



# KPI5: Number of Meetings by Account Executive

SELECT

`Account Executive` AS account\_executive,

COUNT(\*) AS meeting\_count

FROM

meeting

WHERE

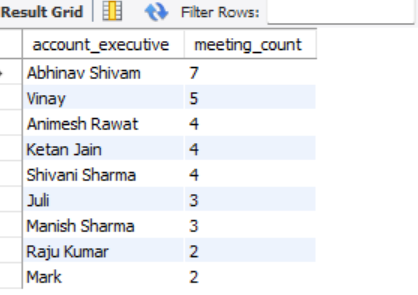
`Account Executive` IS NOT NULL

GROUP BY

`Account Executive`

ORDER BY

meeting\_count DESC;



# KPI6: Top Open Opportunity:

SELECT opportunity\_name, SUM(revenue\_amount) AS 'Top\_Opportunity'

FROM opportunity

WHERE stage = 'Qualify Opportunity' OR stage = 'Propose Solution'

GROUP BY opportunity\_name

ORDER BY SUM(revenue\_amount) DESC

LIMIT 5;

