

Insurance Branch Dashboard

Cross Sell			New			Renewal		
Target	Achieve	Invoice	Target	Achieve	Invoice	Target	Achieve	Invoice
7M	12.64M	3M	4M	3.43M	570K	10M	18.49M	8M

Executive Performance

Account Executive

All

Yearly Meeting Count

2019	3
2020	31

No of Invoice by Account Executive

Divya Dhingra

5195882

Ankita Shah

181836

Shloka Shelat

207330

Vidit Shah

121527

Shobhit Agarwal

42814

Nishant Sharma

1010

Gautam Murkunde

34

Neel Jain

1

income_class

(Blank)

Cross Sell

New

Renewal

No of meeting By Account Executive

Anil Tailor

7

Ankita Shah

5

Divya Dhingra

4

Neel Jain

4

Ritesh Sharma

4

Nishant Sharma

3

Shloka Shelat

3

Shobhit Agarwal

2

Vaibhav K Thaker

2

Stage Funnel by Revenue

100%

Qualify Opportunity

42

Negotiate

5

Propose Solution

2

4.8%

Top Open Opportunity

Fire

500K

DB -Mega Policy

400K

EL-Group Mediclaim

400K

CVP GMC

350K

BE-Mega policy

300K

DB -Terrorism Policy

300K

DS- Employees GMC

300K

FM-Group Mediclaim

300K