

# Data Collection Process

## Next Steps

- Sign and return your Membership Agreement to Cobra Network (CNW). This will initiate the report and platform set-up process
- Cobra Network will advise our third party data analytics and technology provider, Broker Insights, to set up your details on their system
- You will receive an email directly from Broker Insights with your login details to the platform that we are using called Vision™. Please look out for the email which will come from Broker Insights on our behalf
- You will also receive an email invitation to a Microsoft TEAMS meeting from Broker Insights, which a CNW representative(s) will also attend with you. This is the initial report set up call, where we will walk you through step by step how to set up the monthly report on your system/platform. This call should take approximately 30-minutes
- Ahead of the set up call meeting please ensure:
  - a) that you are at your Desktop PC or Laptop for the call
  - b) be prepared to share your screen
  - c) ensure that you are able/authorised by your SWH to run reports (if you are the person who usually runs the annual Book of Business for CNW, then chances are these are in place)
- Please note that you may be asked to provide Broker Insights with the definitions of the Agency and Product codes on your system if these are extensive or differ greatly to the standard codes used by Broker Insights when mapping data
- You'll attend a Microsoft TEAMS set up call with Broker Insights and CNW at the agreed time and date. Unless any problems are encountered your report should be set up by the end of this 30 minute call. Note, once you have run and uploaded your first report, you will be able to view your data in the Vision™ platform. Please note that if the system is not logged into within 30 days, then a password re-set will be required
- Each month, Cobra Network will send you a reminder to run the same "month end" report and upload it to the Vision™ platform. Please run the report up to and including the last day of each calendar month and ensure that it is uploaded by close of business on the 5th of the following month latest. It might be useful for you to include running and uploading the report within your normal month end processing or to set up your own monthly reminder in your diary
- CNW will also send a second reminder to you but if you have already run your report for that month, please ignore!

# Data Collection Process Next Steps - *Continued*

Please note:

## **If you leave the CNW membership:**

CNW will advise Broker Insights and your brokerage will be removed from Vision™ platform with effect from your leaving date

## **If a member of staff, who has their own log-in details for Vision™ leaves your employ:**

It is your responsibility to advise CNW of any users leaving their employ so that CNW can advise Broker Insights. An email to our centralised email [membersupportdesk@cobranetwork.co.uk](mailto:membersupportdesk@cobranetwork.co.uk) is the easiest way to do this

Remember, if Vision™ is not logged into for 30 days, a password reset will be required.