



In Partnership

# BRING CLARITY TO YOUR DATA

How to use Vision's Lenses

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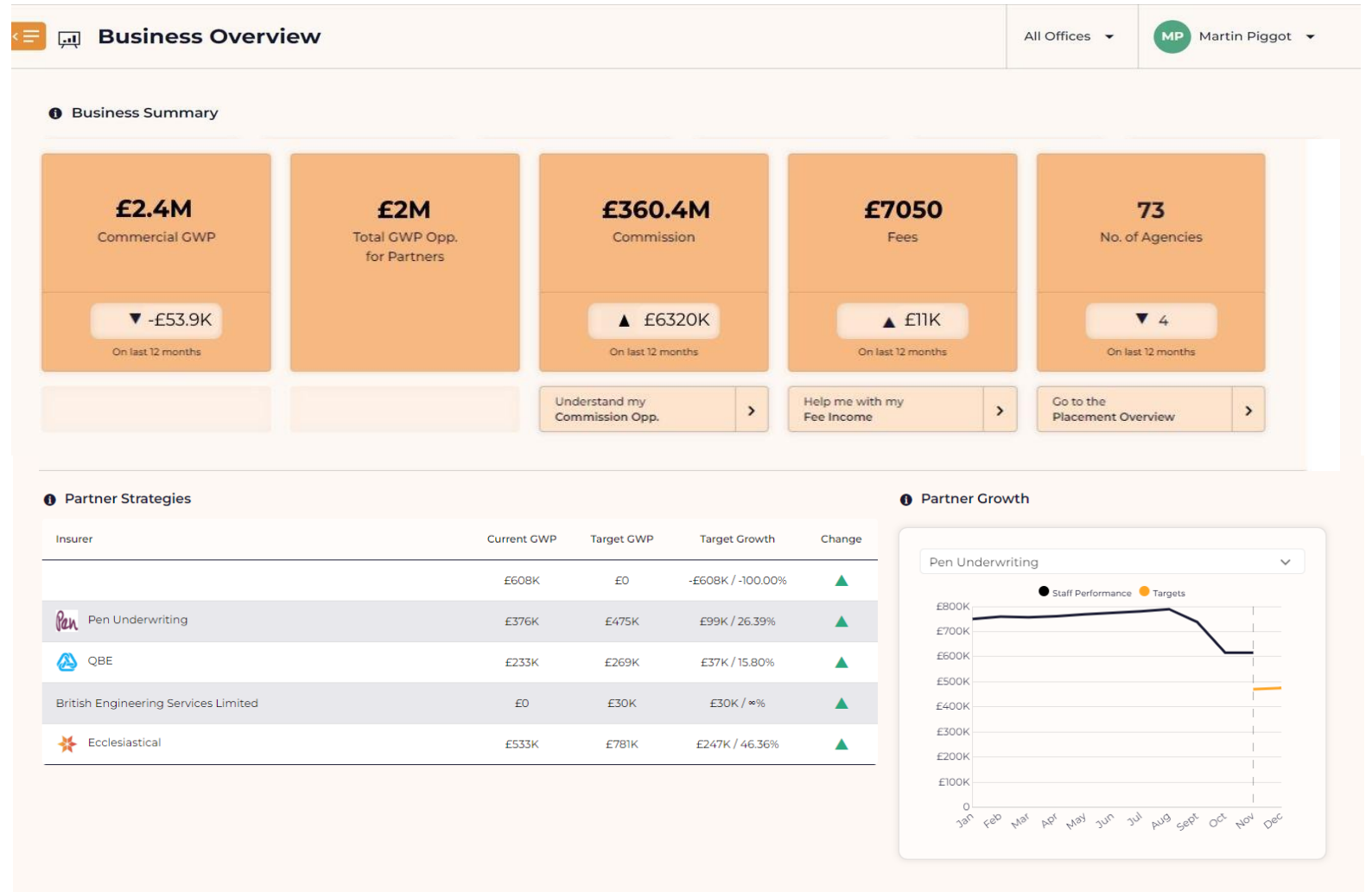
# Business Insights

Use the Business Insights lens to:

- Gain instant access to enhanced Management Information (MI)
- Interrogate your data with ease
- Track progress against targets, including a partner-by-partner view, helping you to drive income



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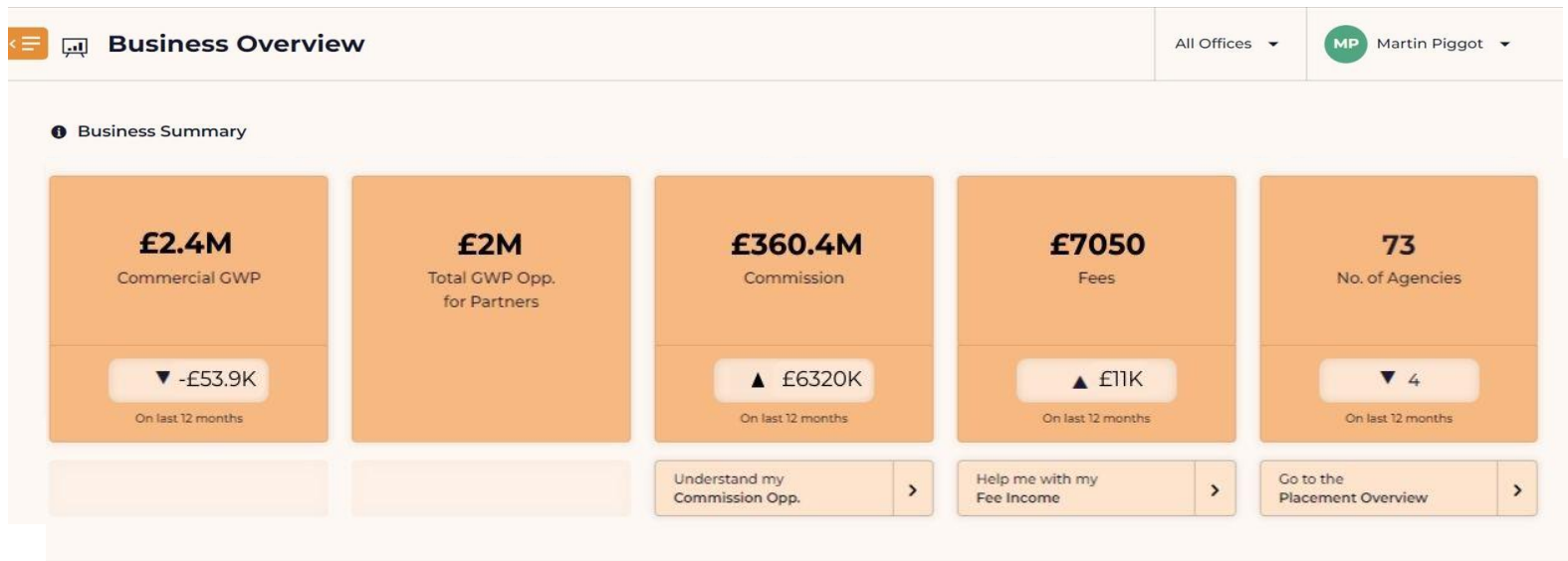
Data for images is illustrative

# Business Insights

Top level numbers give focus to the business metrics that drive income, strategy and market opportunity. All numbers are Rolling 12-month figures including a twelvemonth comparison.

Total GWP Opportunity for Partner insurers (R12 - based on policies incepted in last 12 months).

Number of agencies you are currently working with and a quick link to access the Placement Overview.



Commercial GWP (R12 - based on policies incepted in the last 12 months).

Commission which includes a quick link to help you understand this in more detail.

Fees – with a link to help you with Fee Income information.

# Business Insights

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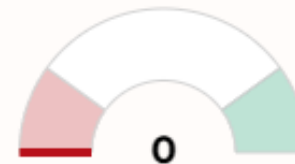
Within the Business Insights lens, you will have an overview of your Renewal Management page, showing how many policies are due for renewal, how many are being marketed and not marketed.

It also displays what's been renewed or lost with a quick link to the Renewal Management page below where you can actively manage these policies.

## Workflow & Notes of Interest Overview

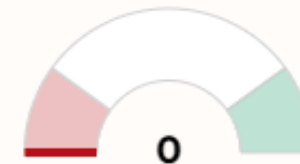
Renewing	Marketing	Not Mark...	Renewed	Lost
1264	74	17	20	3

### Strategic Insurers



answered out of  
88 notes of interest

### Non-strategic Insurers



answered out of  
0 notes of interest

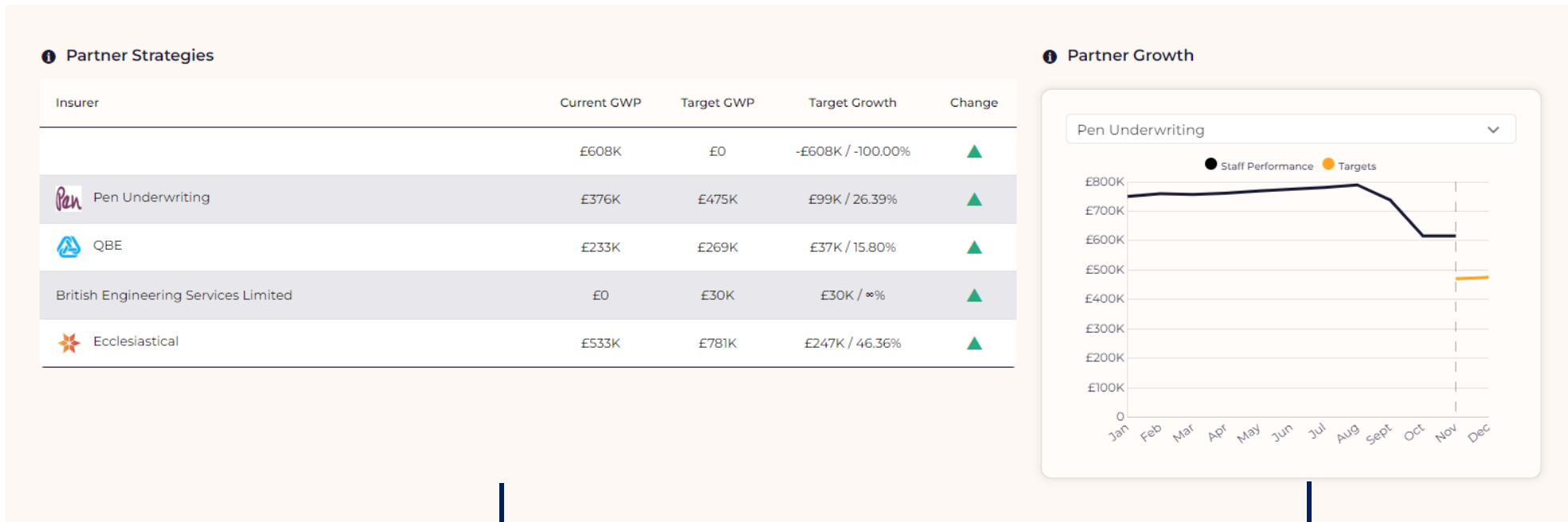
Go to Renewal Management



# Business Insights

Placement Strategy is imperative to a broker's business growth and should be continuously tracked and updated.

Broker Insights Vision™ transforms this process, allowing you to efficiently set and track growth targets in one place.



Once strategies have been set this displays the Insurers you have set these up for, their current GWP, what the target is and how much you are looking to grow by, plus a visual to highlight its performance.

Tracks the strategies set against staff performance with the ability to click through each insurer.

# Placement Strategy

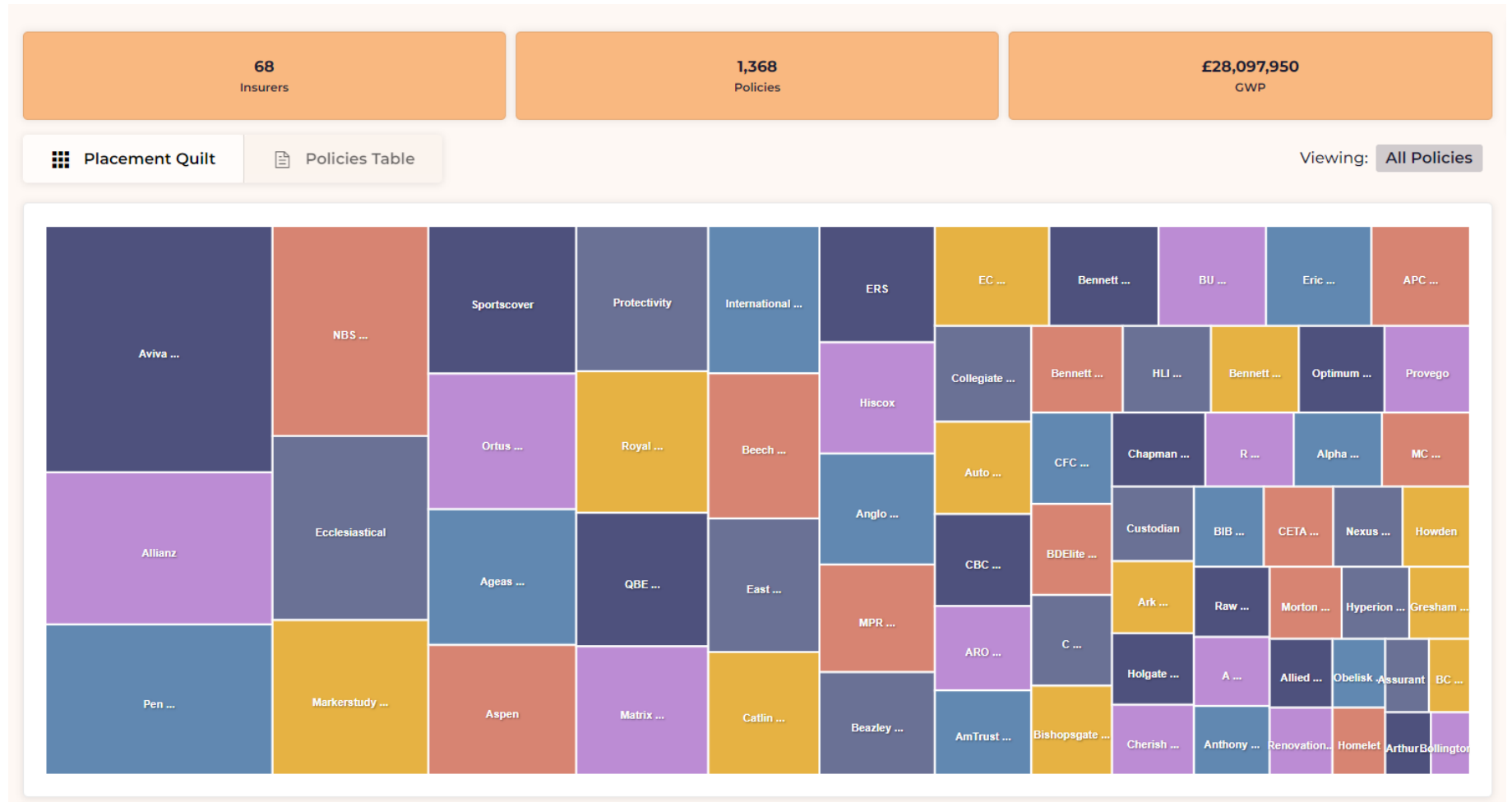


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A holistic view of your current commercial book of business.

You can view briefly how many live accounts you have and with whom they are placed, how many live policies there are along with a table detailing all these policies, how many agencies you work with and a total live GWP value – the headline figures will represent these numbers.

The Larger the tile the more you have placed with that insurer and the smaller the tile the less you have placed.



# Placement Management



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If you click a tile on the placement screen you will be taken to just the cases that fall under the selected insurer, displayed in a clear listed format using the information from your broking platform.

You will notice your headline figures adjust to reflect what you are viewing.

The screenshot shows a dashboard with three summary tiles at the top: '1 Insurers', '67 Policies', and '£1,241,800 GWP'. Below these are two tabs: 'Placement Quilt' and 'Policies Table'. A 'Viewing: All Policies' dropdown is on the right. A table lists policies with columns for Customer, Handler, Policy Number, Insurer, Product, Product Class, Renewal Date, Premium, and In App. A blue arrow points from the 'In App' column to the explanatory text on the right. Another blue arrow points from the bottom of the table to the explanatory text at the bottom.

Customer	Handler	Policy Number	Insurer	Product	Product Class	Renewal Date	Premium ↓	In App.
Maggy Gadault	BB	AGTI-7081323831	Allianz	Commercial Motor	Fleet Rated Commercial Motor	02/04/2024	£42,000	
Valida Leail	BB	AGTI-1463101661	Allianz	Commercial Motor	Fleet Rated Commercial Motor	19/11/2023	£42,000	
Mersey Mehaffey	JW	AGTI-5927212558	Allianz	Financial	Bond Miscellaneous	23/02/2024	£42,000	
Katharina Kimmel	CR	AGTI-1360538861	Allianz	Property	Contractors Combined	07/04/2024	£42,000	
Shaylah Weond	BB	AGTI-5038597730	Allianz	Property	Commercial Combined	29/10/2022	£38,500	
Agustin Lieb	JW	AGTI-7284544860	Allianz	Property	Commercial Combined	20/08/2023	£38,500	
Phineas Mansbridge	JW	AGTI-2529102682	Allianz	Property	Commercial Combined	22/04/2024	£36,750	
Lyndell Carress	CR	AGTI-5635939837	Allianz	Property	Contractors Combined	27/01/2024	£31,500	
Jackie Thandi	CR	AGTI-4481628192	Allianz	Property	Property Owners	12/02/2024	£31,500	
Mauricio McCormick	BB	AGTI-4312586351	Allianz	Property	Commercial Combined	22/05/2024	£31,500	
Wynne Beggini	CR	AGTI-1672017109	Allianz	Property	Commercial Combined	09/12/2023	£31,500	

The In Appetite column gives you the ability to see briefly the insurers who may be interested in having a discussion around the case because it falls into their appetite

Clicking on any case will also bring up the policy information screen (as seen in the renewal management page) giving you the ability to send a note of interest or interact with received notes of interest too.



# Vision Platform Filters

On every page within Vision, you will see an orange filter tab – click the tab and a series of filters will appear.

The advanced filters let you go into more detail. You can use the pre-built sliders to help with cases, so you look at things such as policies in your pre-set lead time to see what is renewing soon or even agencies where you have 5 policies or less to support in agency rationalisation.

Filters

Search

Held Insurer

Select Date Range

Appetite Matched Insurer

Advanced Filters

Insurer Type

All Non-Partner Partner

Owner Type

All Only Mine

Show only policies in lead time

Show only policies with an inbound NOI

Show renewals in appetite

Show agencies under 5 policies

CSV Policy Details Download

Clear Filters Apply Filters



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The Top filters give you the ability to search for any specific cases, look at held insurer information, policy renewal date ranges and if any cases match a specific insurer appetite for when you are looking to move cases to specific partner insurers.

Make sure once you have selected the filters required that you always click the Apply Filters button

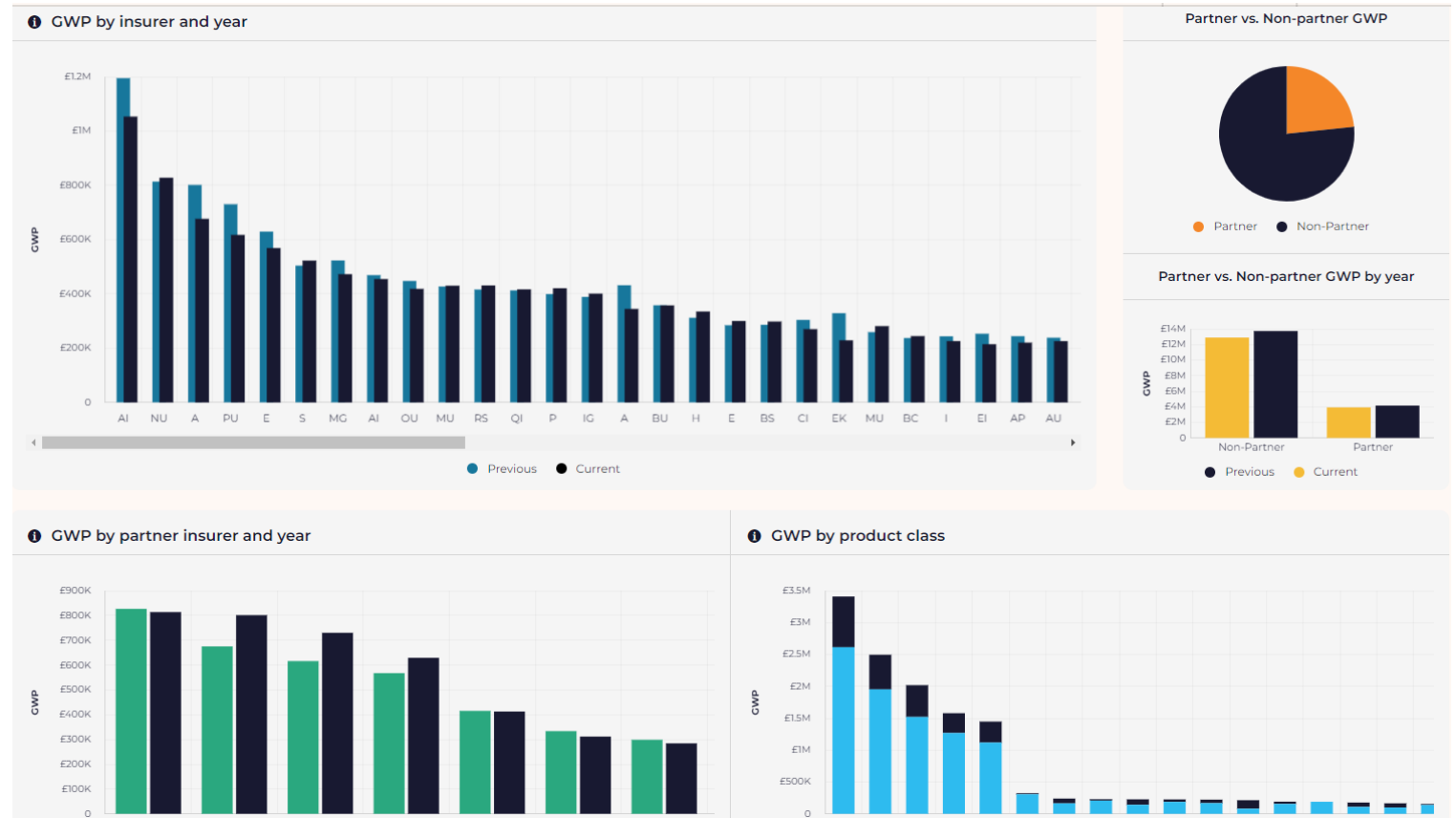
# Performance Management - GWP Insights



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The GWP Insights screen gives you an easy to see visual display of how your commercial book is performing, shown in a rolling twelvemonth display.

All graphs display tool-tips when hovering your cursor over any, giving you further detail on the information being displayed such as the insurer or policy type name and GWP value.



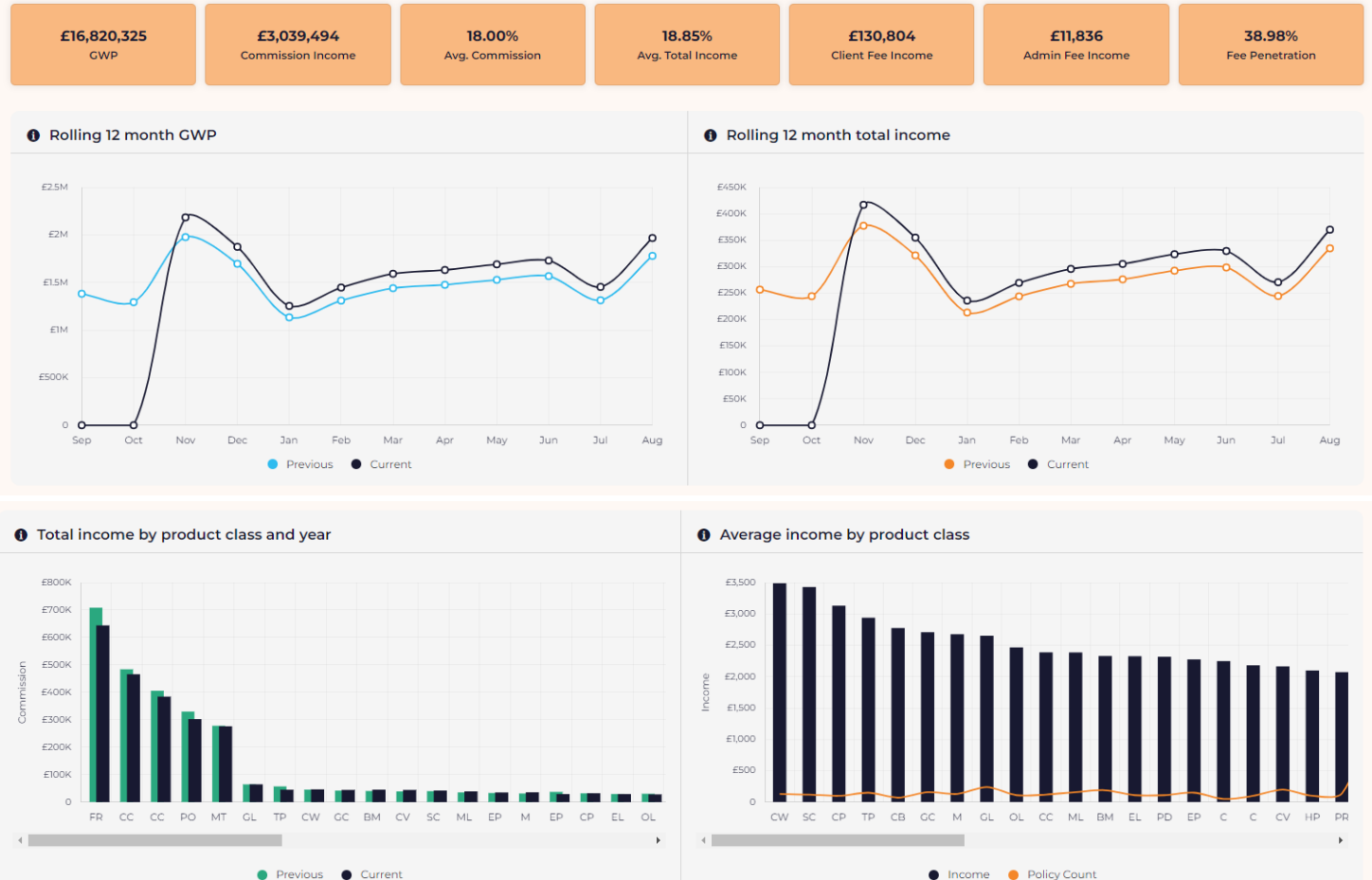
# Performance Management - Income Analysis



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The Income Analysis screen is there to provide detailed insights on your overall business performance.

It provides a quick and easy way of seeing how your business is performing by giving you a rolling twelvemonth view of GWP figures and income, split in various ways.



[www.brokerinsights.com](http://www.brokerinsights.com)