



Understanding for Agencies

Making smarter business decisions requires smarter business data.

Independent Insurance Agencies, Carriers and Networks want data that is accurate and easier to understand in order to make better business decisions. And that's exactly what AgencyKPI provides with the first software platform that enables and improves collaborative planning, performance tracking and operational efficiencies for the insurance industry.

Who is AgencyKPI?

AgencyKPI is a software company solely focused on the Independent Agency distribution channel, and the developer of the first integrated business intelligence platform designed to address and manage the overabundance of data produced by incompatible software and legacy systems.

AgencyKPI takes heaps of monthly production reports, PDFs and spreadsheets and translates that data into more intuitive charts and graphs.

UNDERSTANDING

FOR AGENCIES

Understanding by AgencyKPI™ is a game-changer.

“How are we doing?” For some Partner Agencies, it’s harder to answer that basic question than it should be.

Why? Because sales performance data comes from different sources and in different formats. It’s difficult, if not almost impossible, to organize and analyze it.

Understanding changes everything. Now, Partner Agencies will have a better – and much easier – way to organize and analyze data. By using Understanding, Partner Agencies can:

- Work with intuitive charts and graphs to review data and gain insight into how a Partner Agency is progressing each month with Core Carriers.
- Plan collaboratively with personnel, insurance carriers, wholesalers and a network to ensure all parties clearly understand their expectations—and accountability—to aim for success.
- Add carrier production data not supplied by a network.

How Understanding works:



- 1 The Network negotiates with Carriers for lucrative revenue opportunities for Partner Agencies.



- 2 Carriers send the Network monthly production reports for Partner Agencies.



- 3 The Network uploads the production reports to AgencyKPI.



- 4 Partner Agencies get performance details from the Network’s Core Carriers in one place.

AGENCYKPI

Learn more at AgencyKPI.com.

Contact us at help@agencykpi.com or 979.221.2882.