



## Agent Training Suite



\*\*\*\*\*  
Insurance  
Agent





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# Suite Objective

## Make agents

- Identify buying triggers (Other Than Price) for every lead
- Break goals into smaller targets for starters
- Set and Compare against right examples
- Teaming new and ordinary performers with winners/ leaders
- Harness skills by encouraging and game rather than by force
- Making selling a behavior
- Overall development and alignment with corporate goals







# LionOrbit Product Suite for Insurance Carriers

Polymorphic Role based Dashboards



Intuitive Learning Experience & Highly Secured



Advanced Analytical Engine



Cloud and Mobile Ready



Customizable KPI Engine



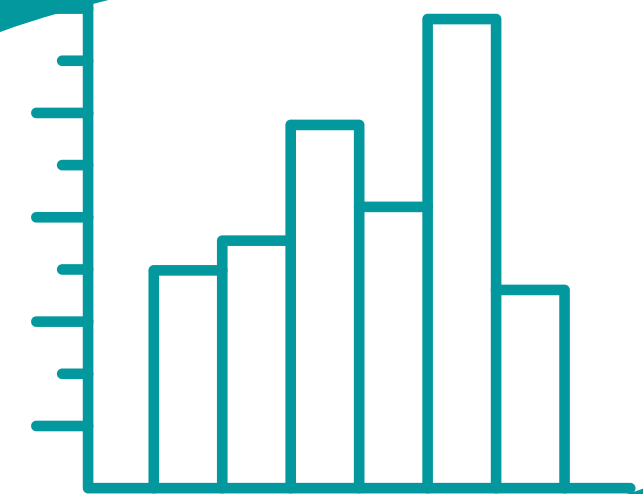
Gamification





# Analytics Product

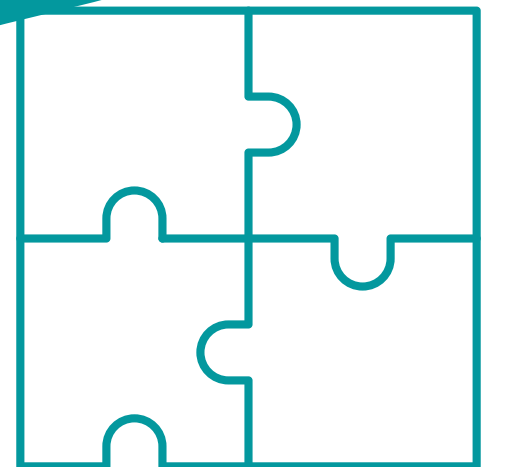
- Snap-to-Grid Placements – Effective screen usage
- Multi Visuals
- Drilldowns
- Global Filters with interactivity
- Printable, Sharable & Exportable





# Gamification Product

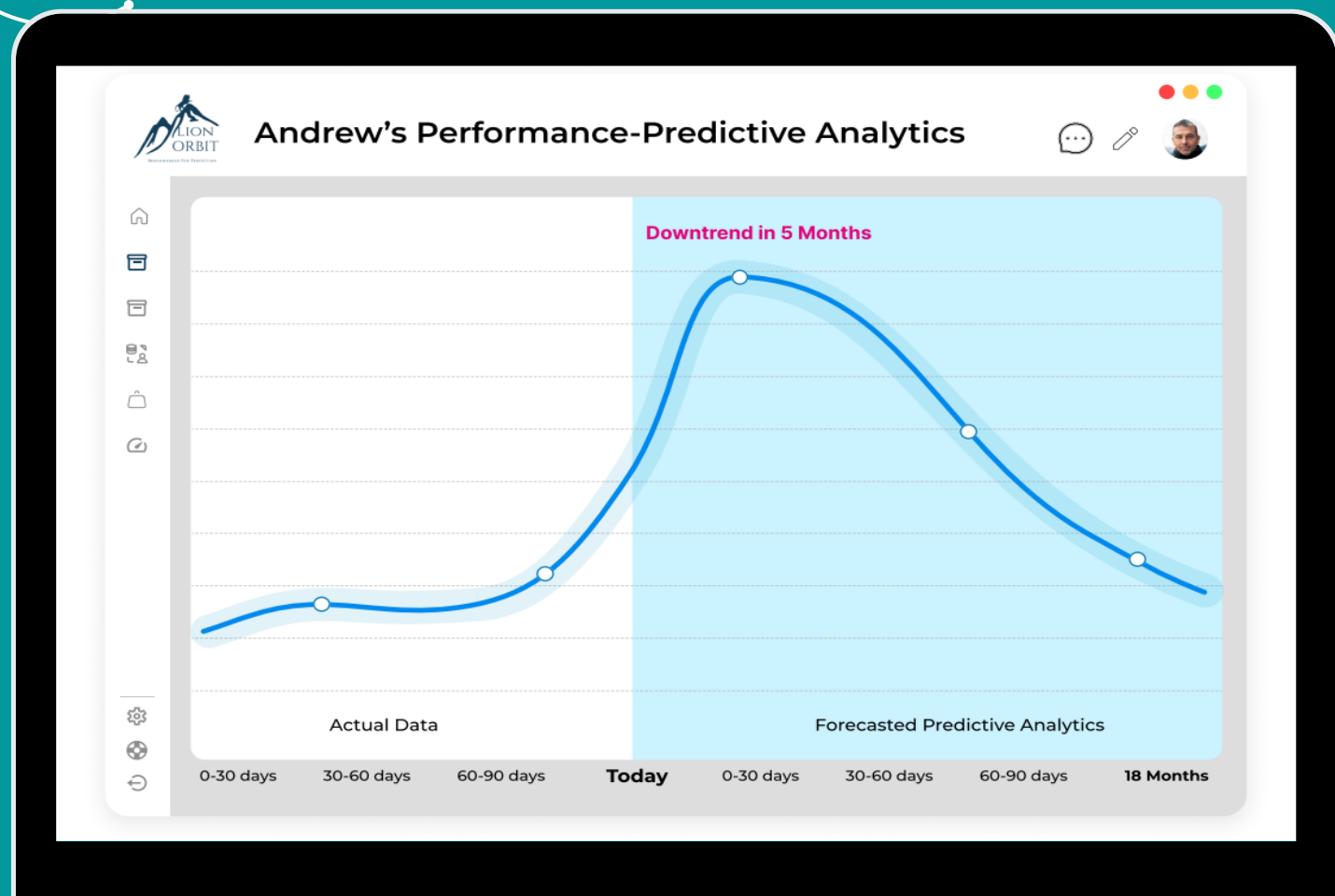
- Customized gaming themes
- Content management
- Easy to adapt
- Highly Responsive
- Encourages to out perform
- Leaderboards and many more





# Unique Features

- Can be integrated to insurers legacy systems
- Inbuilt Task assignment module
- Soft Skill modules
- Inter community messaging
- Provides trend analysis



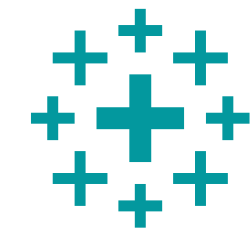
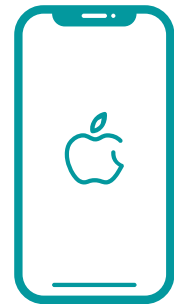




# Business Architecture



Supports multiple interfaces



Plugins for Tableau and Power BI



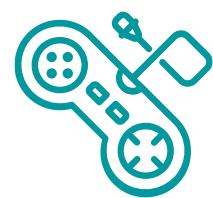
Power BI

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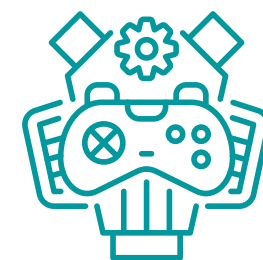
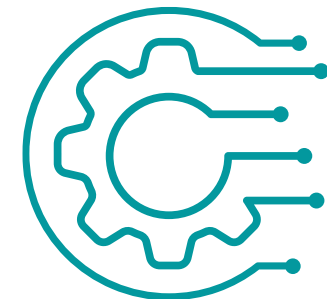
Integrated with CRM, & command center



Dashboards



Gamification



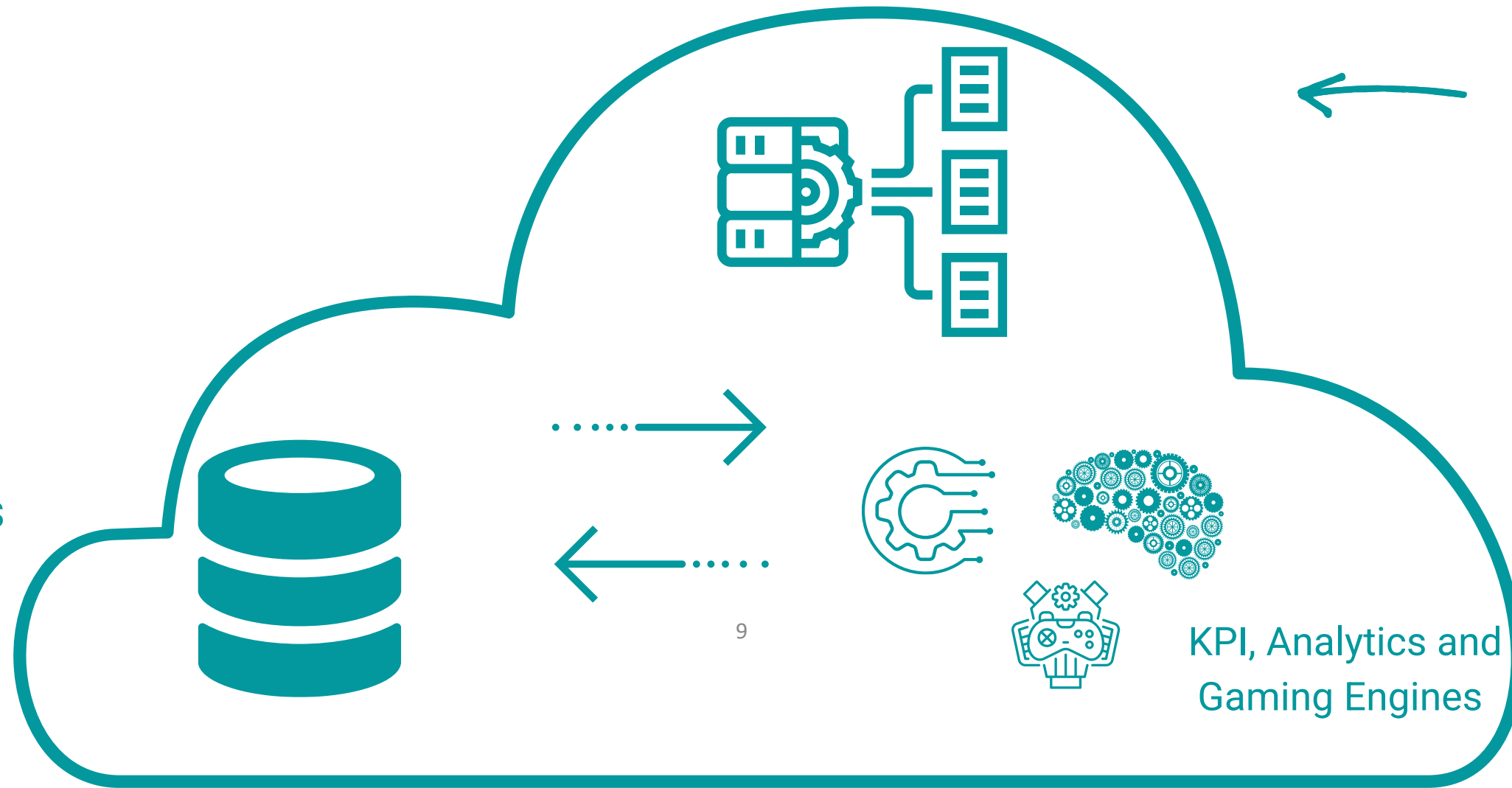
KPI, Analytics and Gaming Engines





# Product Architecture

The raw data passes through the Engines translated to Data Warehouse.



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Cloud Ready

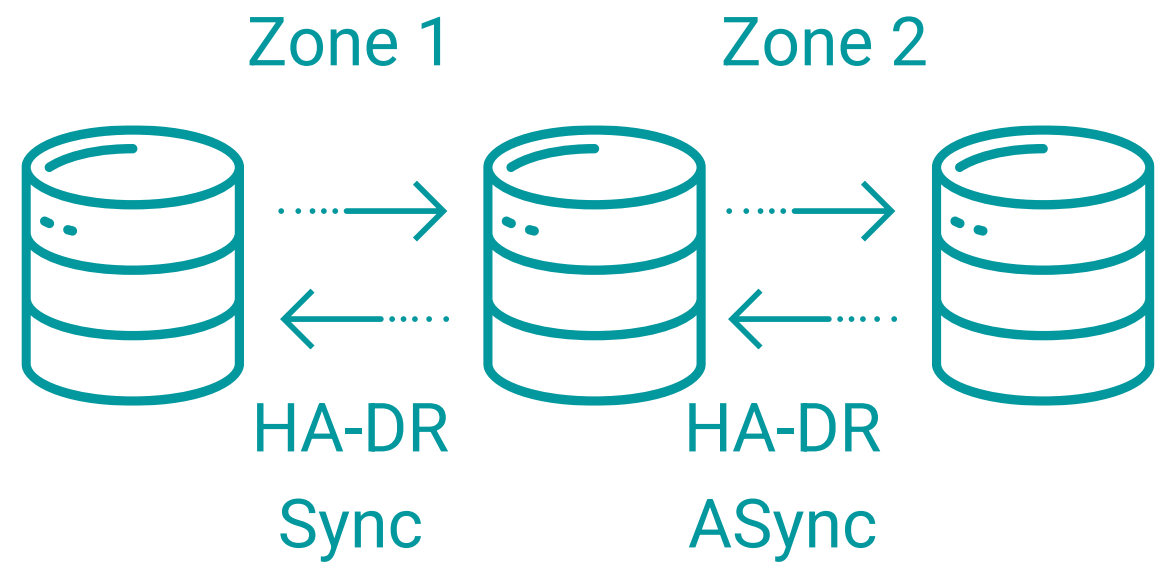
- 
-  Power BI
-  Dashboards
-  Gamification



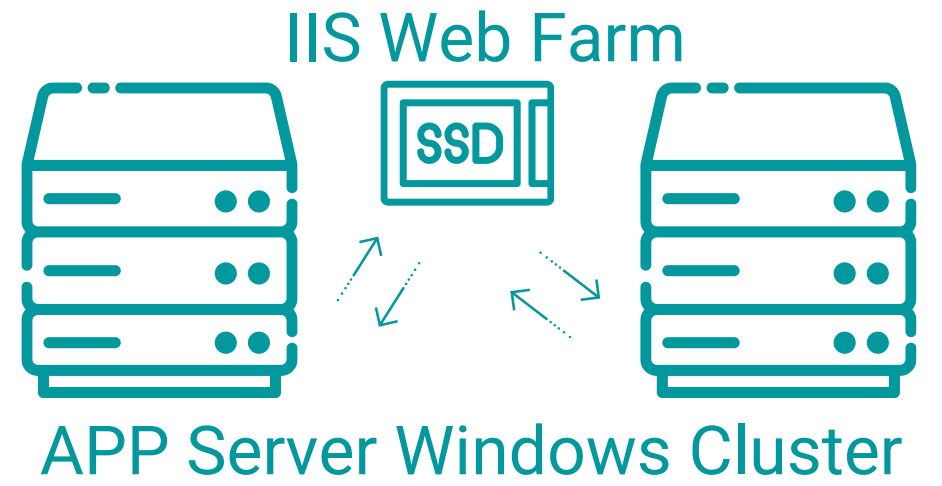
# Cloud Server Architecture

Production

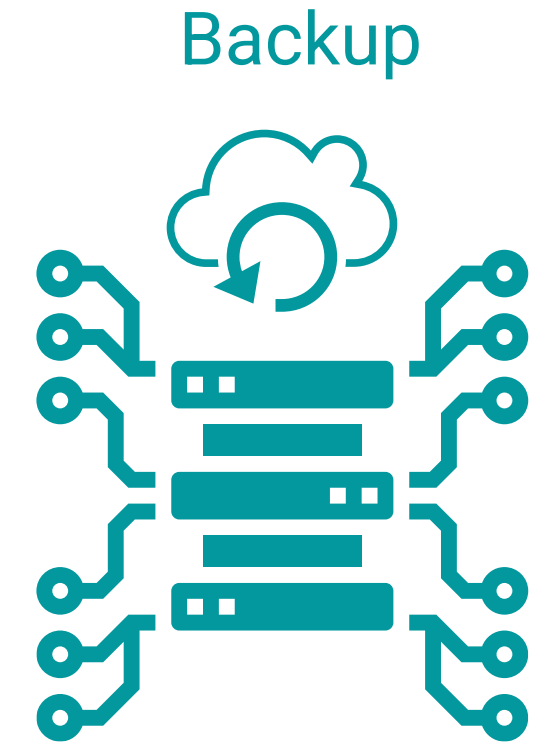
DB Server Windows Cluster



SQL Server



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DevOps Server  
CD / CI  
Robust  
Coding

DB Server Windows Cluster



SQL Server



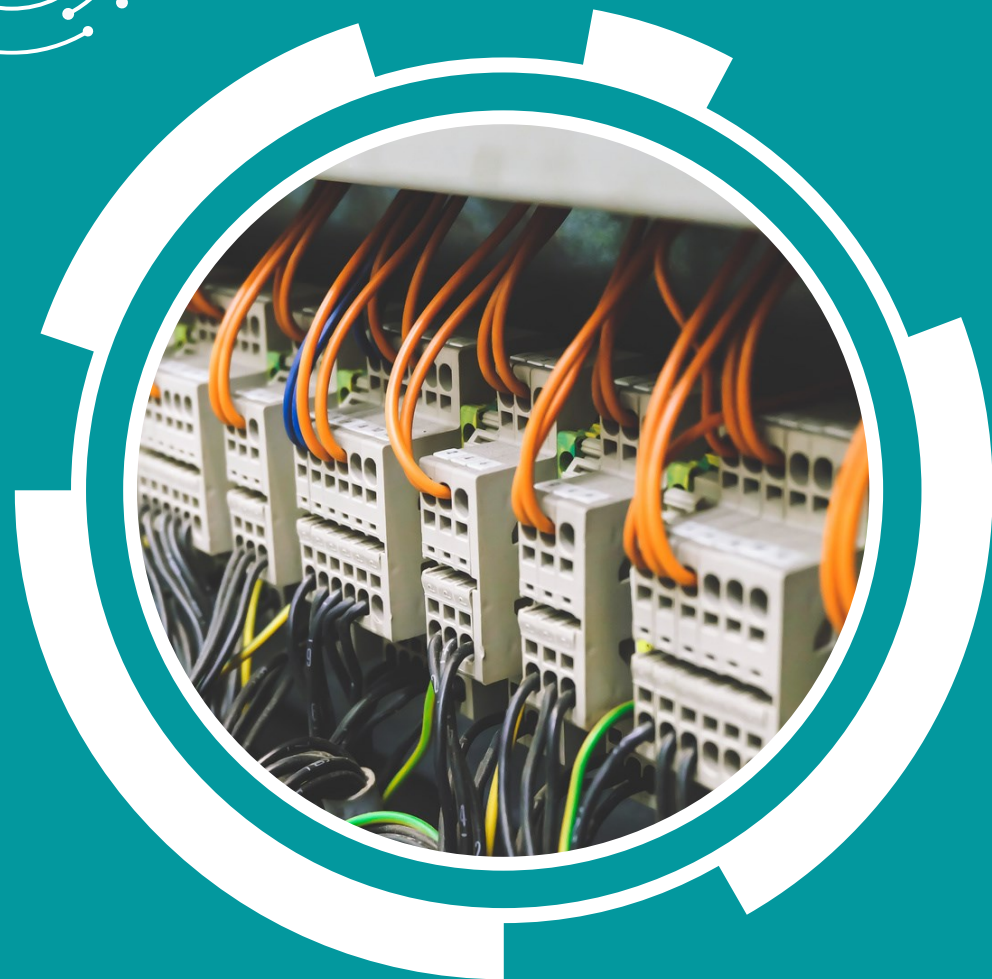
APP Server Windows Cluster

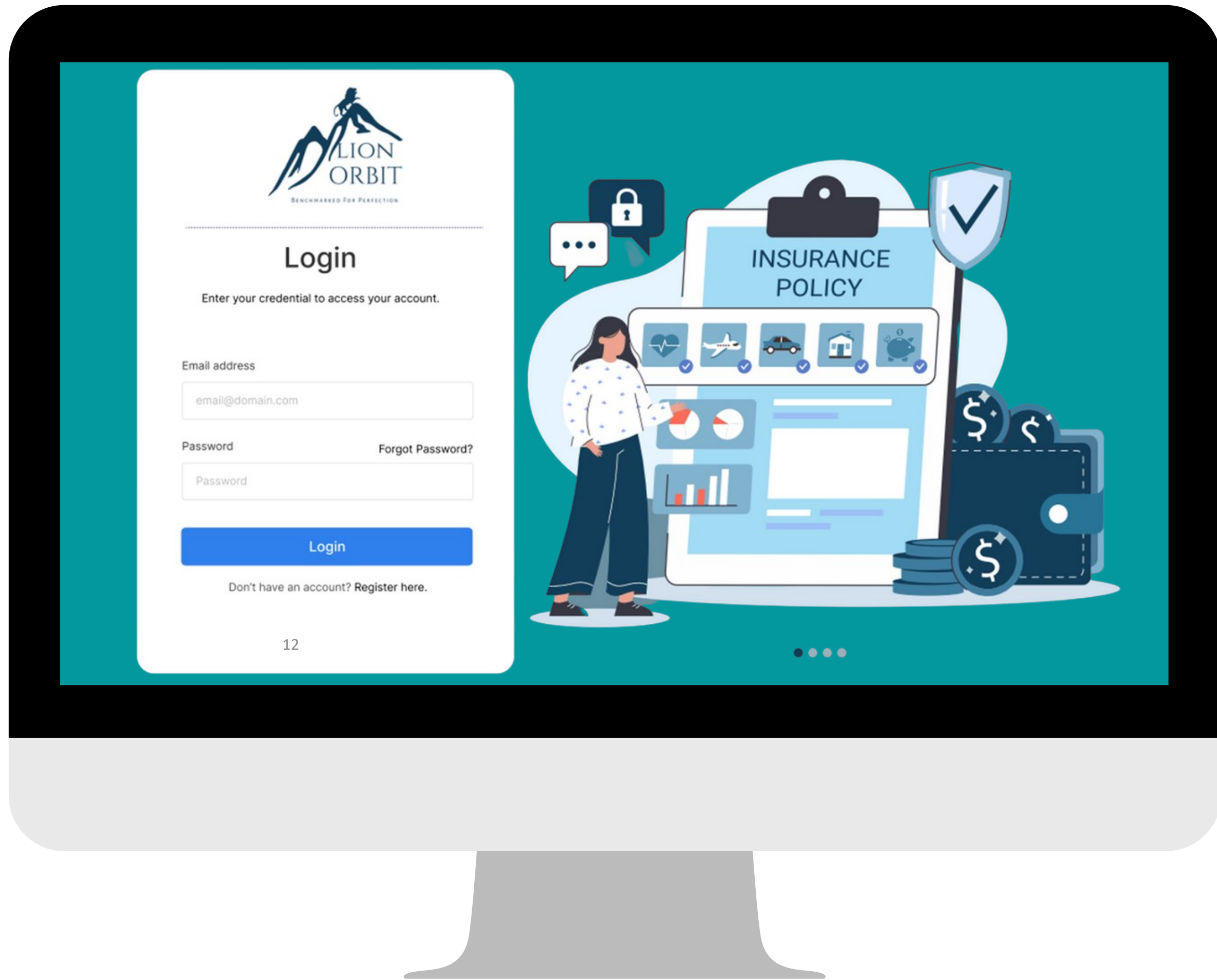
Stage / Test



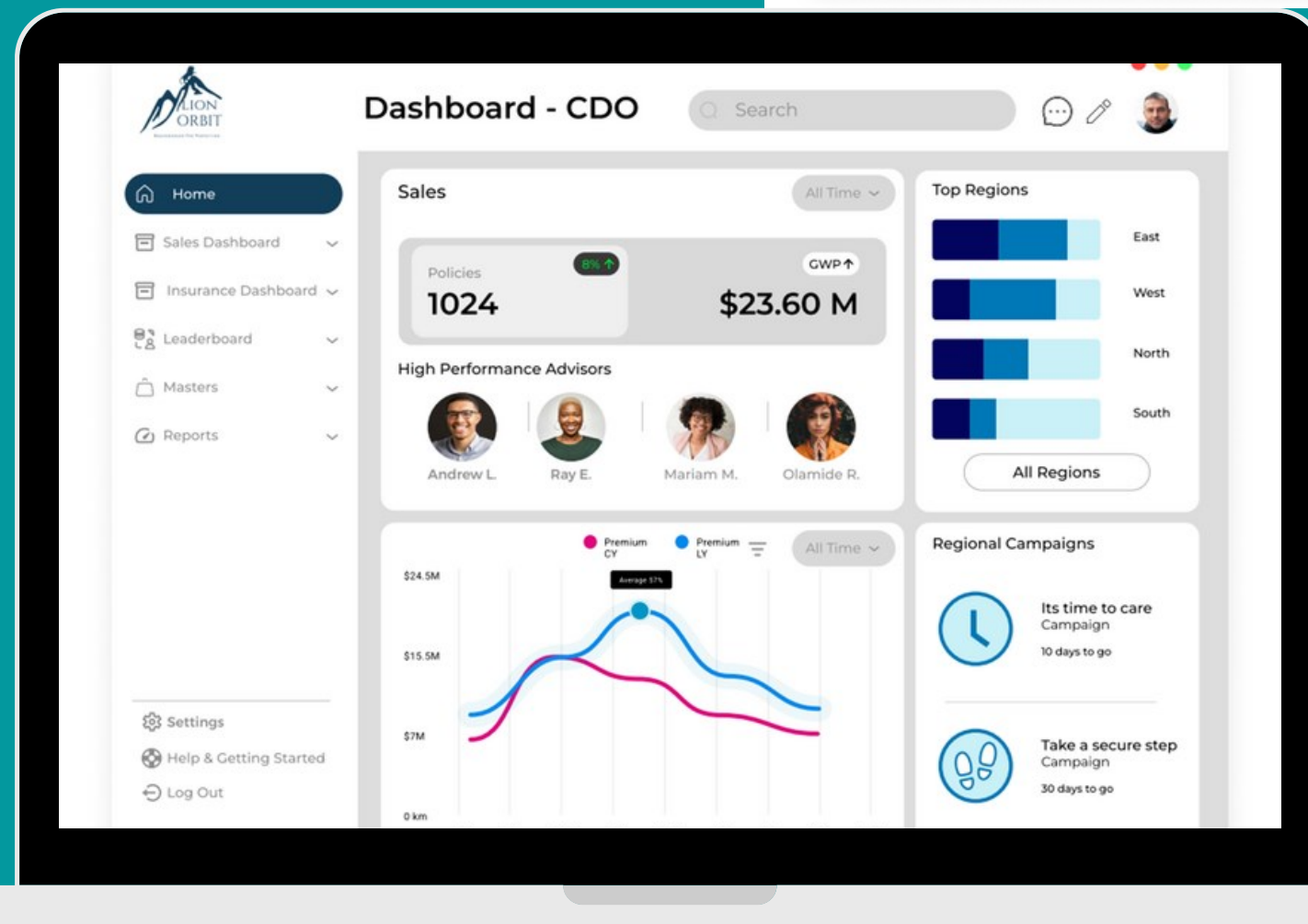
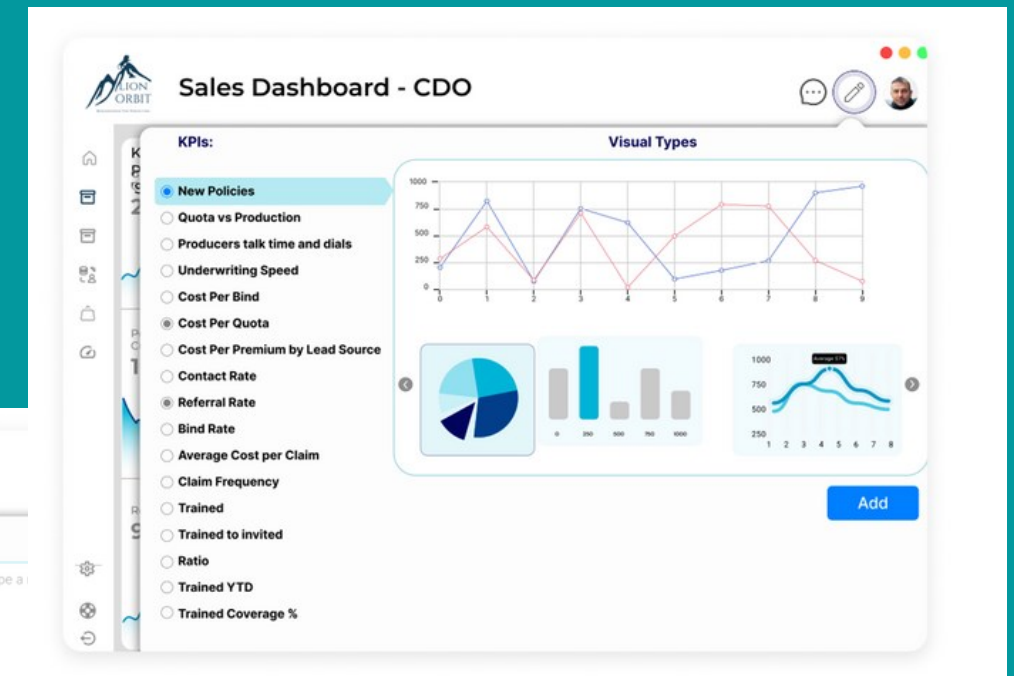
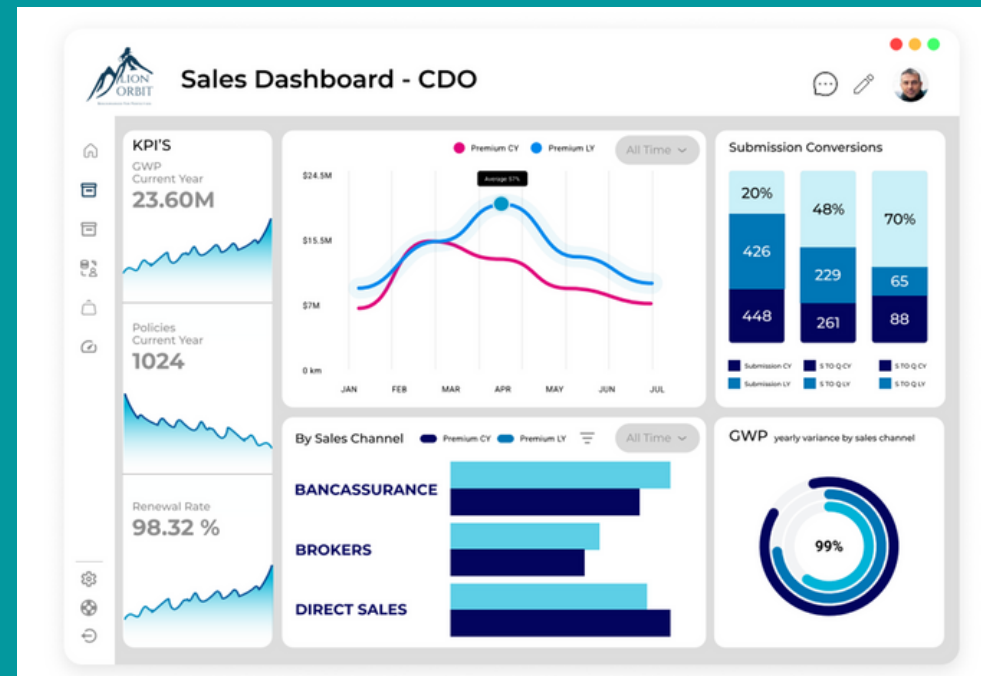
# Software Requirements

Database Servers	OS	MS Windows Server 2016 or Above
	Database	MS SQL Server 2016 or Above SQL Agent
	SSMS	SSMS 2016 or Above
<hr/>		
Application Servers	OS	MS Windows Server 2016 or Above
	.NET Framework	.NET CLR 2.0, 4.0, 4.5
	IIS	10.0
	Source Control	Azure DevOps Services 2019
	Office Suites	MS Office Professional Plus 2019
	SSMS	SSMS 2016 or Above





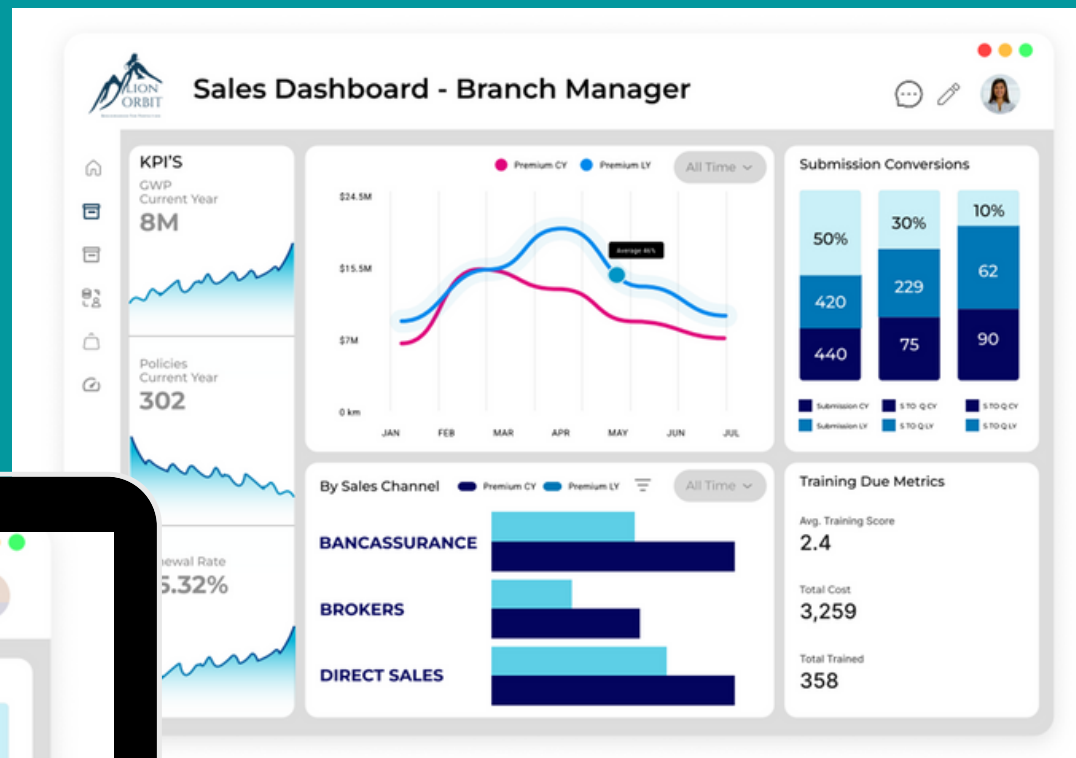
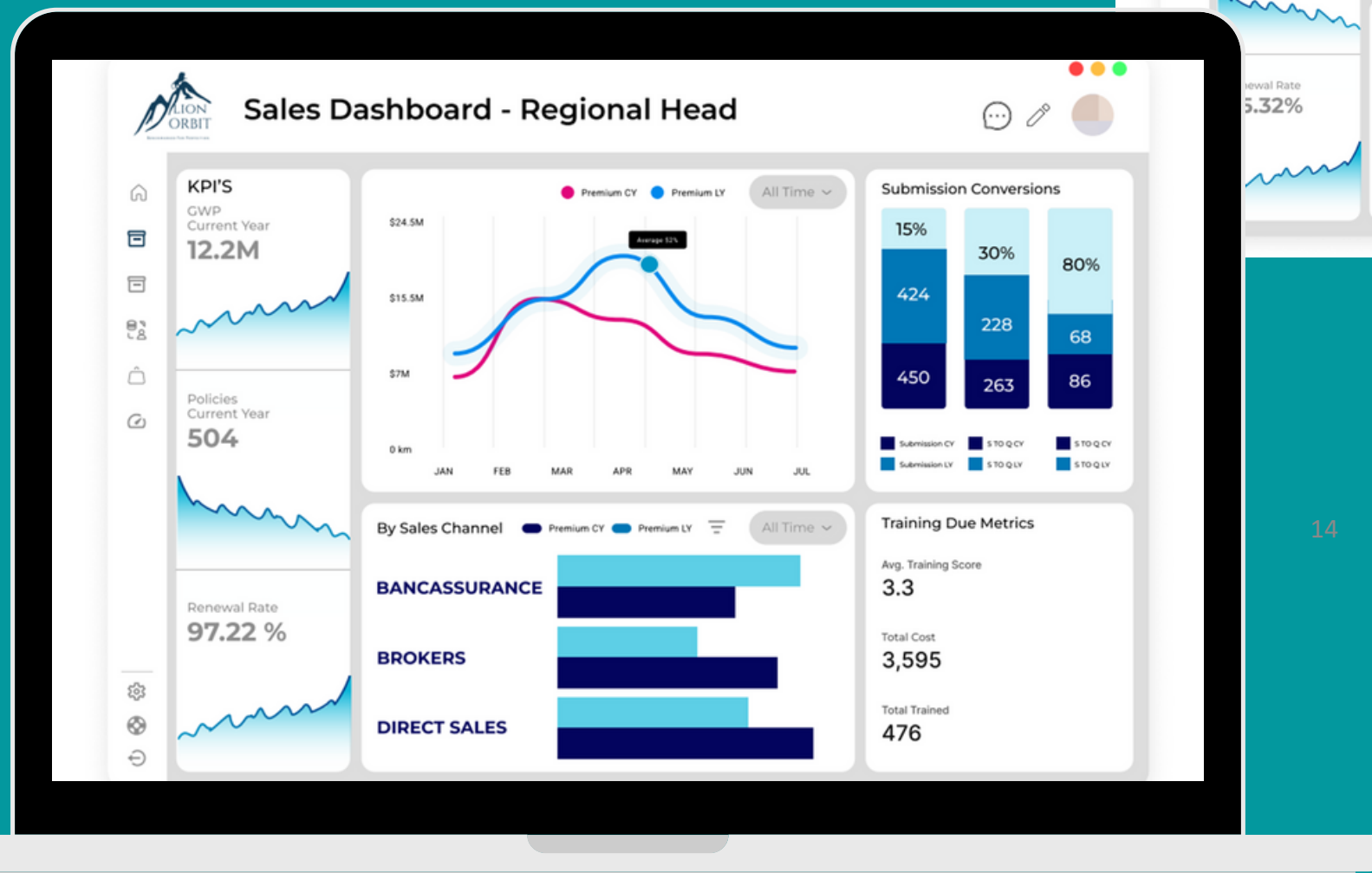




Chief Distribution Officer's Dashboard to monitor.

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- Performance of each regions to Individual Agents.
- Campaigns and proactive measure on sales.
- Sales and conversion rates.
- Performance of various sales channels etc..
- And send quick messages to select groups



## Polymorphic Dashboards

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- Managers can monitor the progress and performance
- Agents can compare performances with their peers
- Dashboards and KPI's can be customizable



### Leaderboard - Sales Training - CDO

**Key Training Metrics**

- Total Invited: 486
- Total Trained: 464
- Trained to Invited: 95%
- Total Active: 917
- Unique Trained: 351
- Coverage %: 38%

Program Name	Trained	Unique	Programs	ManDays
Effective communication	14	14	1	42
Corporate guidelines	15	15	1	45
Mastering the minds	7	6	2	7
Convincing potential customer	8	8	1	24
Time Management and scheduling	23	21	2	55

**Trainings vs Sales**

North: Total Trained 90, Total Sales 10M, Avg. Training Score 4.5

East: Total Trained 130, Total Sales 6M, Avg. Training Score 3.8

### Leaderboard - Sales Training - Branch

**Key Training Metrics**

- Total Invited: 302
- Total Trained: 240
- Trained to Invited: 78%
- Total Active: 751
- Unique Trained: 212
- Coverage %: 20%

Program Name	Agent Score	Top Score	Badges	Course Type
Effective communication	4.0	4.5	[Gold]	Video
Corporate guidelines	4.2	4.6	[Gold]	Audio
Mastering the minds	3.9	4.9	[Gold]	Interactive
Convincing potential customer	3.2	4.0	[Gold]	Document
Time Management and scheduling	2.9	3.9	[Gold]	Video

**Trainings Vs Total Sales**

Branch	Total Sales	Training Score
Andrew L	3.6M	4.6
Ray E	2.5M	4.4
Mariam M	1.2M	3.2
Olamide R	800K	2.8

### Insurance Dashboard

**KPI'S**

- GWP Current Year: 8M
- Policies Current Year: 302
- Renewal Rate: 85.32%

**Polices** CY 1,005 LY 995

**Gross Written Premium**

**Total Exposure \$9.01M**

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### Leaderboard - Sales Training - Branch

**Key Training Metrics**

- Total Invited: 354
- Total Trained: 278
- Trained to Invited: 88%
- Total Active: 801
- Unique Trained: 238
- Coverage %: 28%

Program Name	Trained	Unique	Programs	ManDays
Effective communication	13	13	1	36
Corporate guidelines	11	12	1	42
Mastering the minds	6	5	2	6
Convincing potential customer	7	6	1	22
Time Management and scheduling	21	08	2	48

**Trainings vs Sales**

Central: Total Trained 30, Total Sales 2.5M, Avg. Training Score 4.5

Perry: Total Trained 28, Total Sales 2.2M, Avg. Training Score 3.8

Dragon: Total Trained 25, Total Sales 1M, Avg. Training Score 3.6

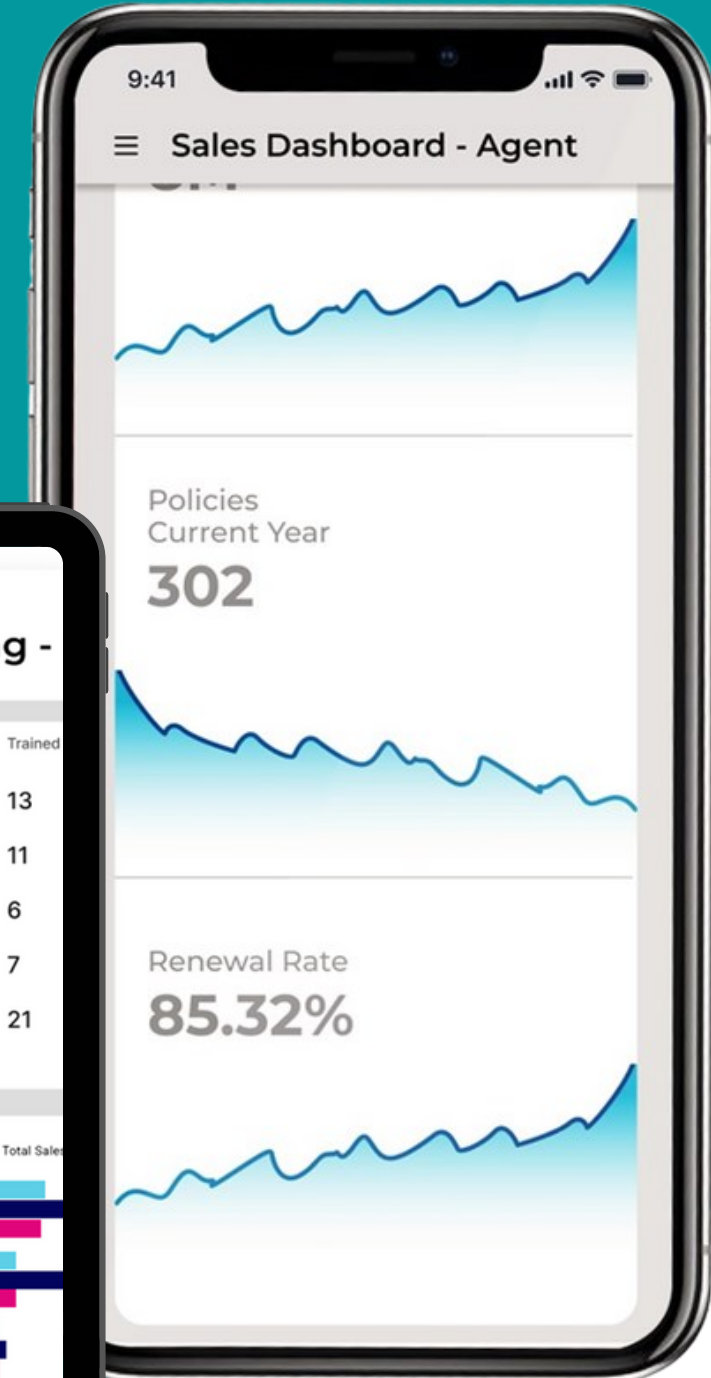
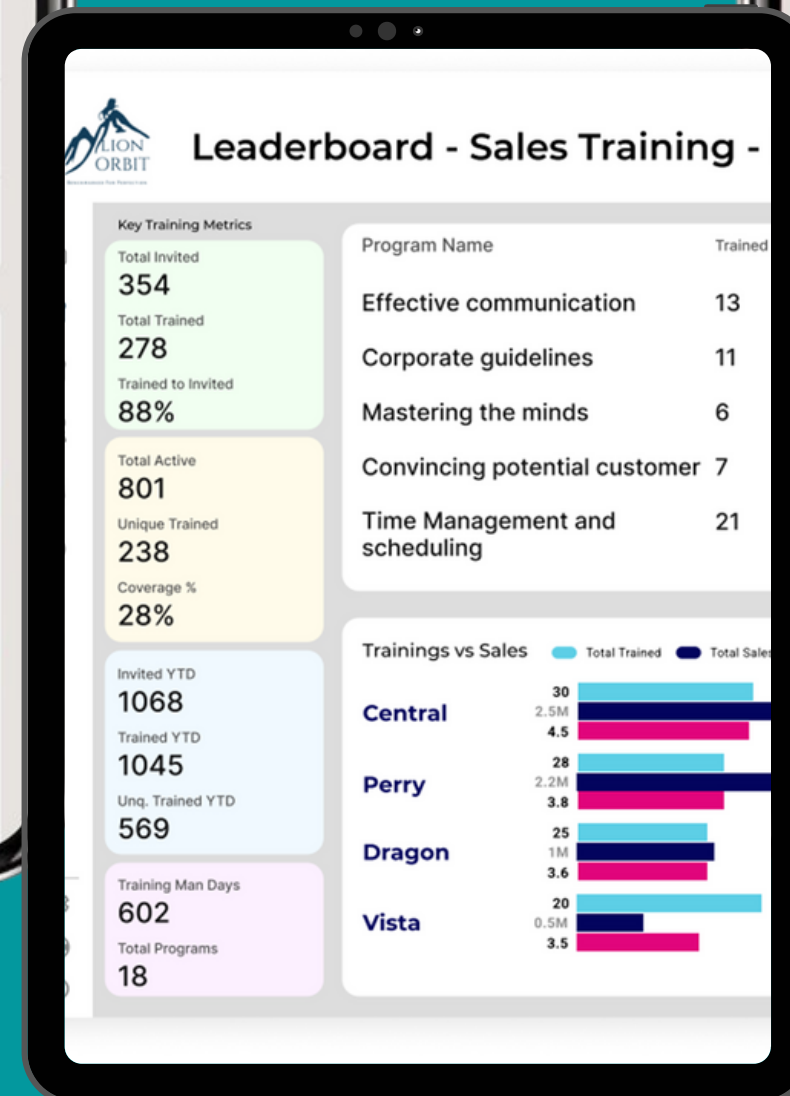
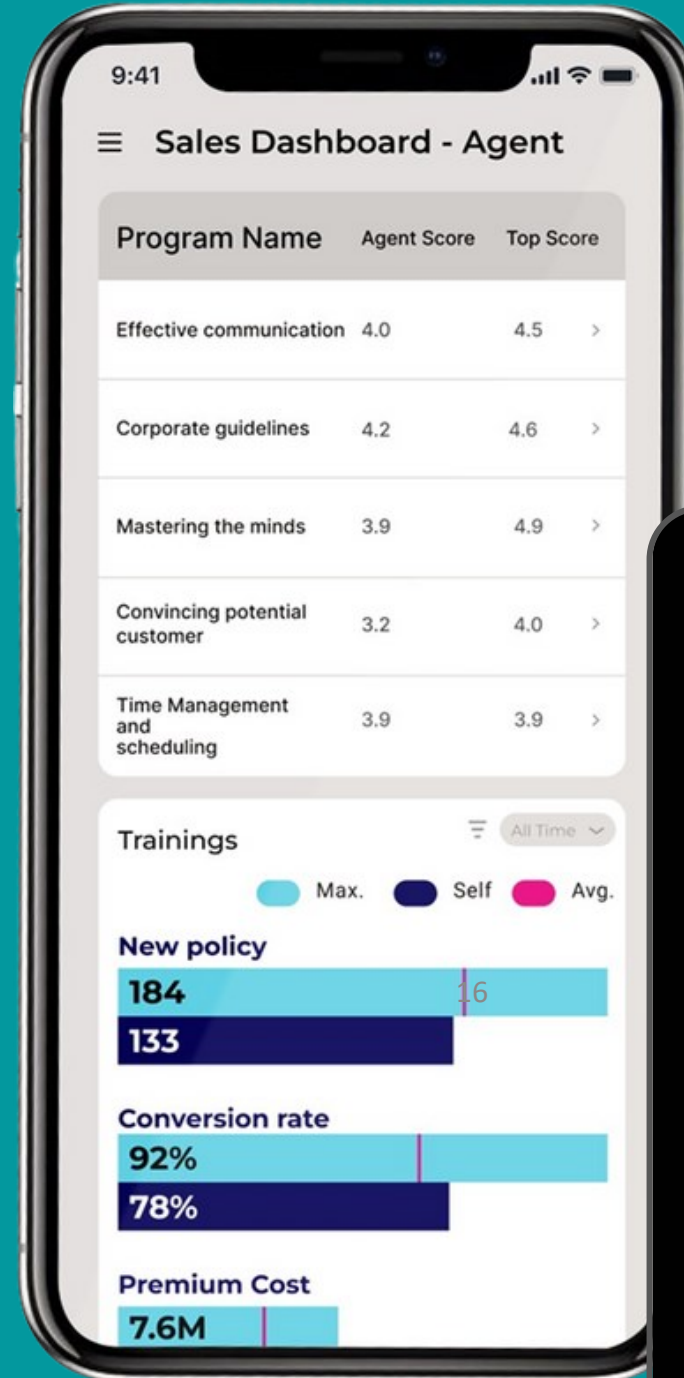
Vista: Total Trained 20, Total Sales 0.5M, Avg. Training Score 3.5

Fully Customizable





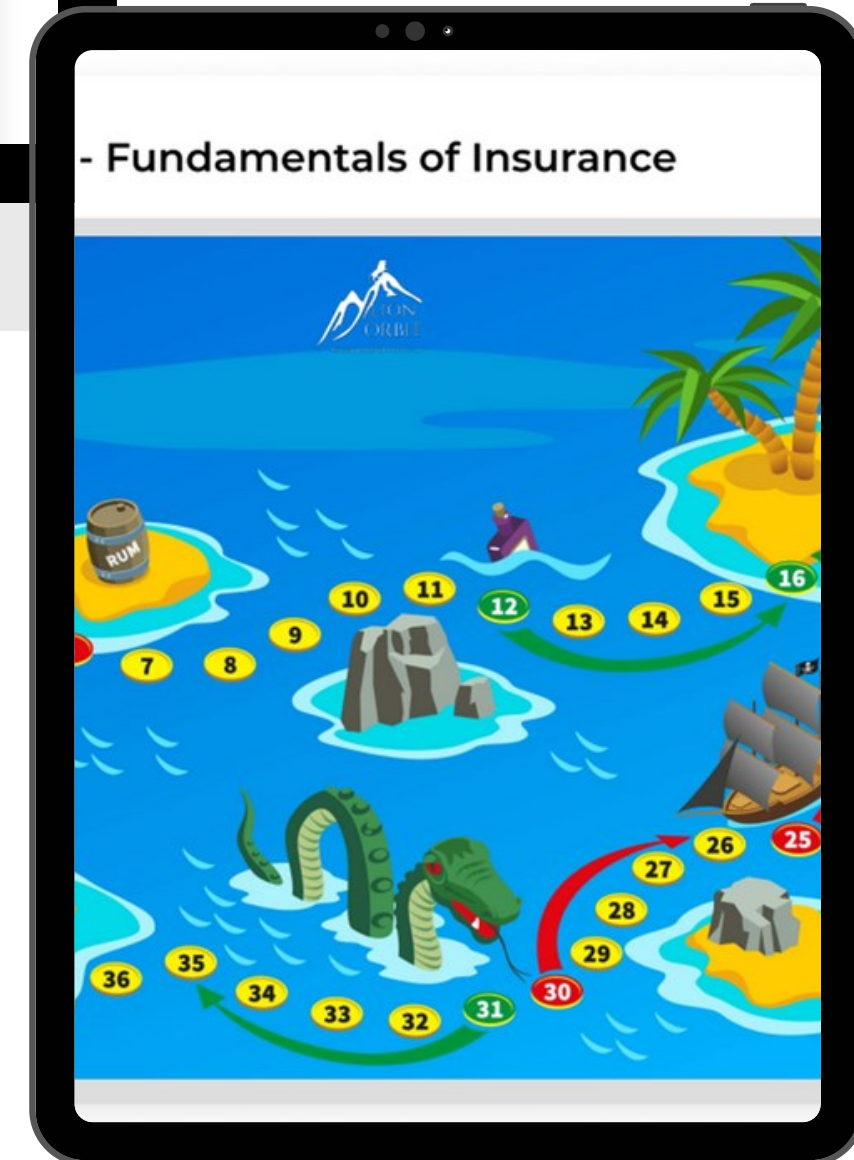
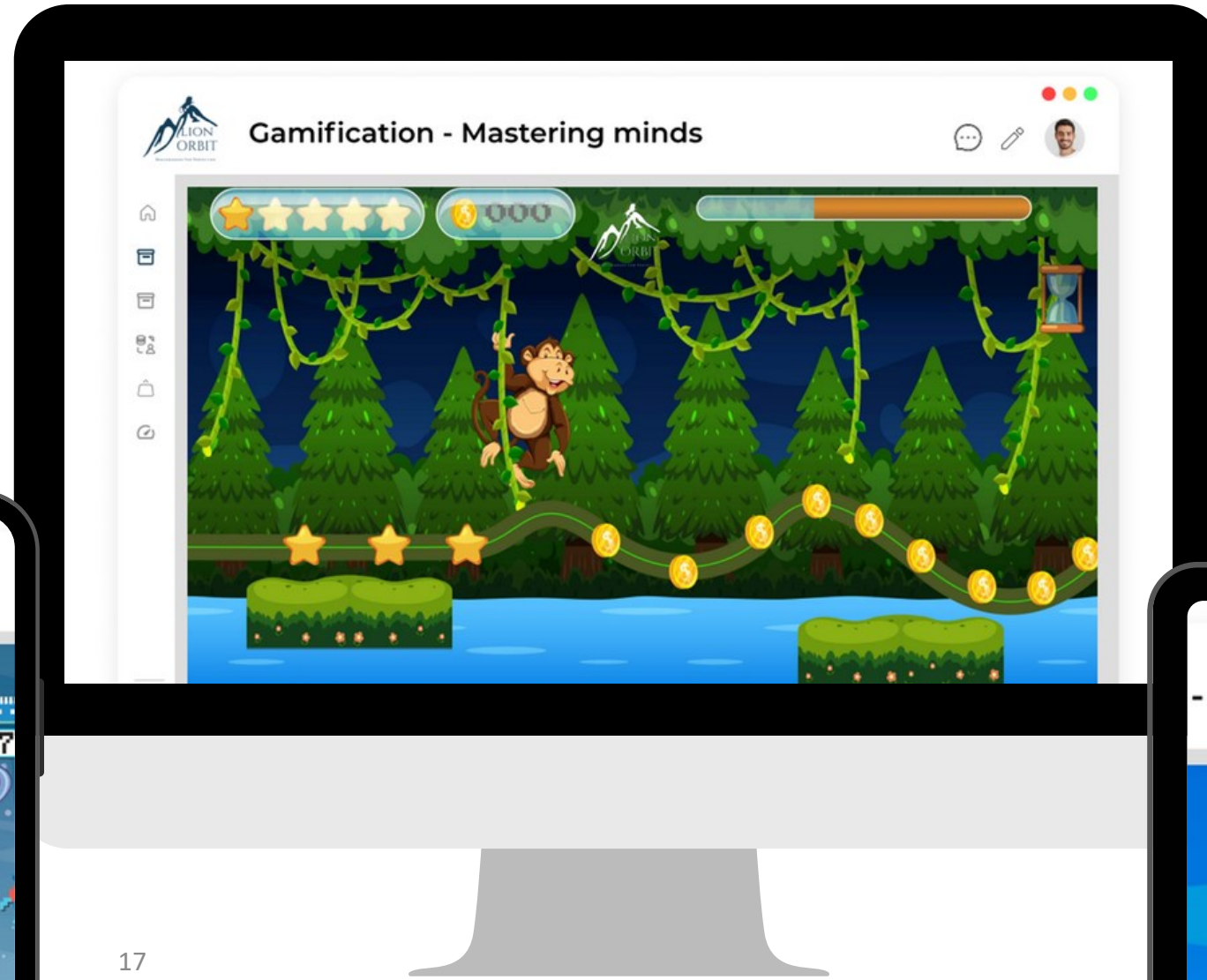
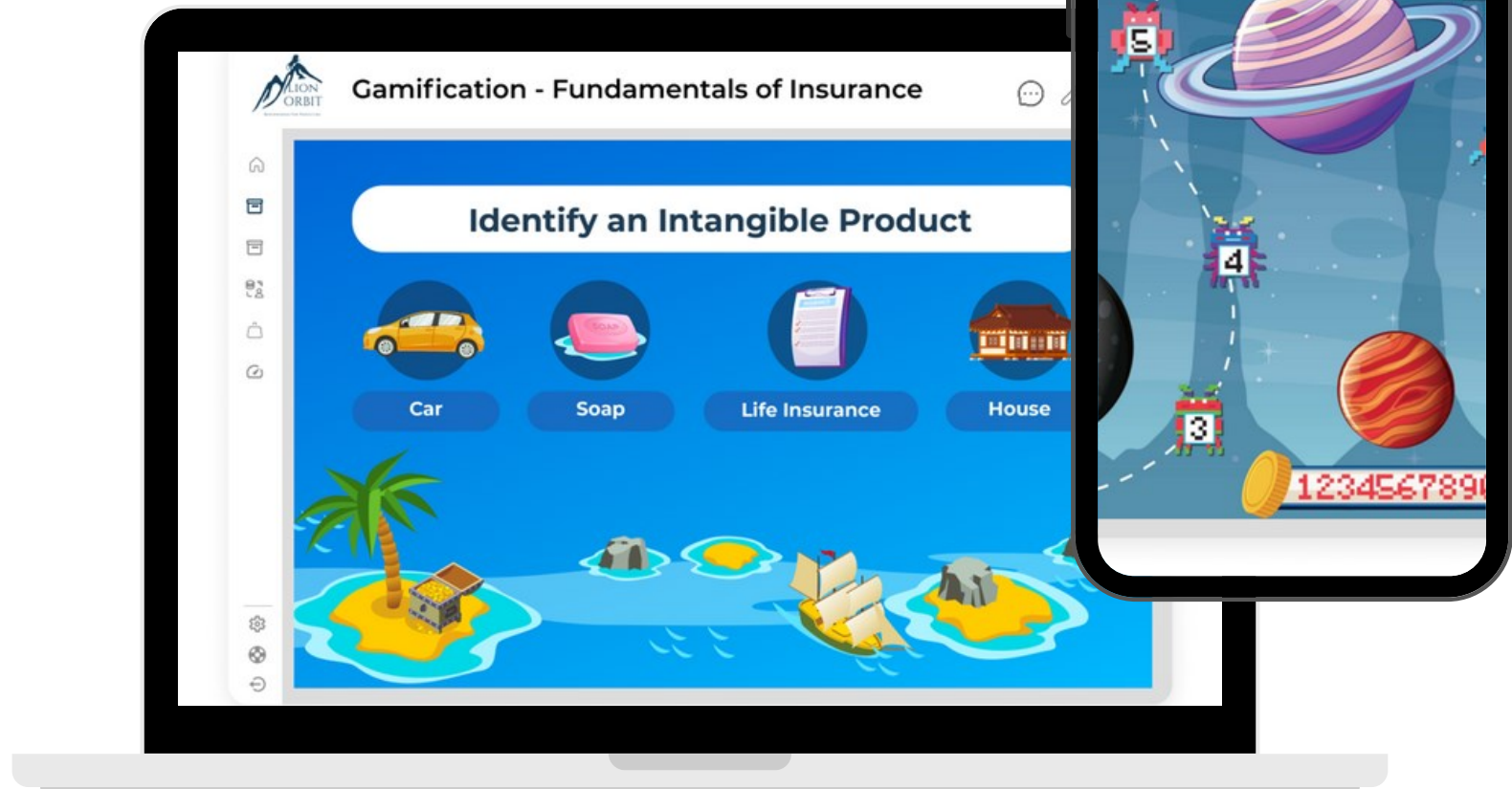
# Mobile Ready







# Interactive Gamification





# Additional Personality Development



Networking Skills



Communication and Self Grooming



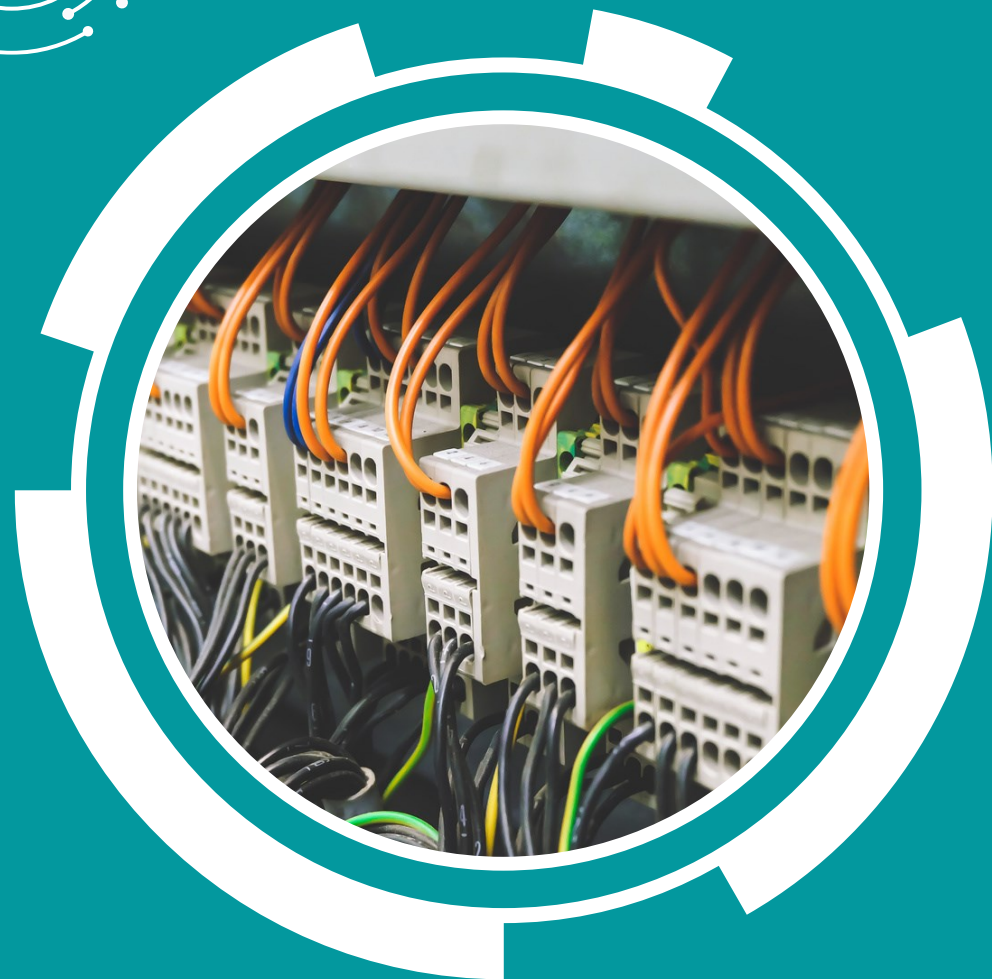
Social Media Skills



Negotiation Skills



Researching Skills







Thank you..