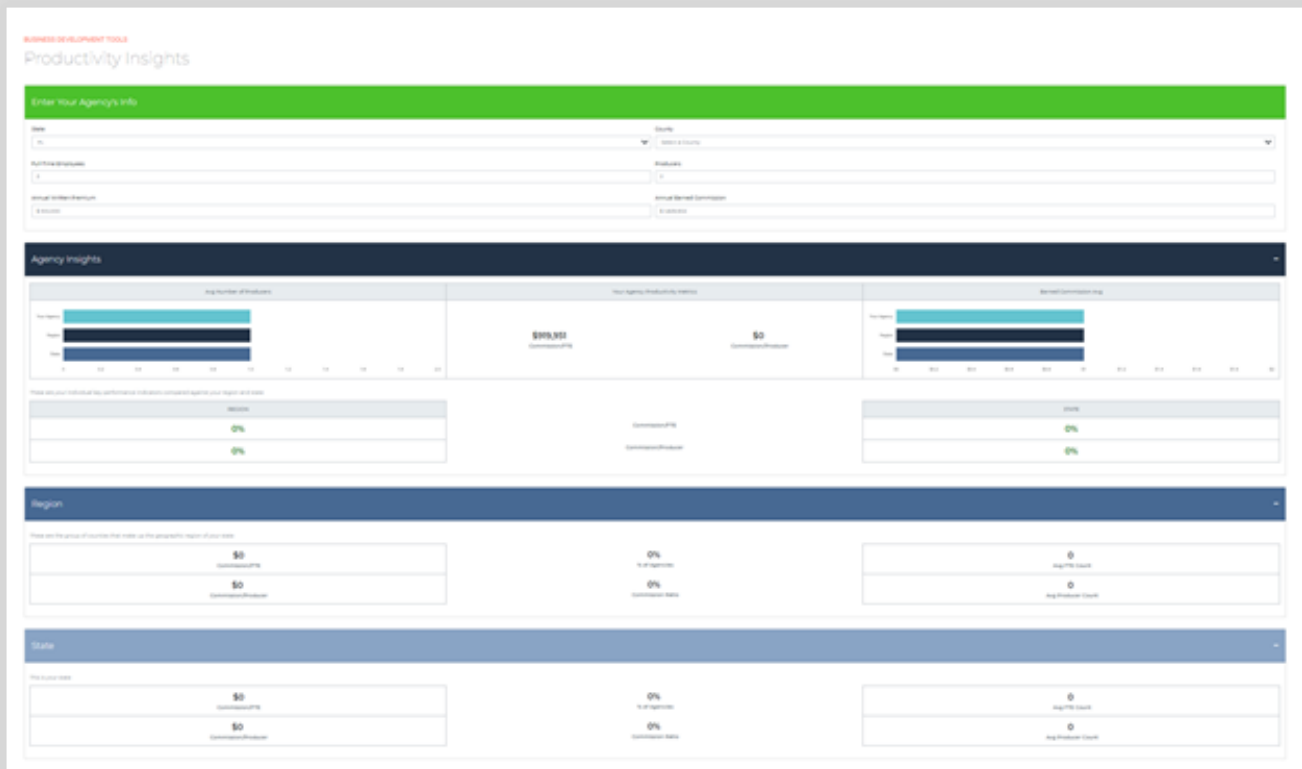


# WHAT'S NEW WITH QUICKCLICKS BDT



## Productivity Insights (QuickClicks Insights)

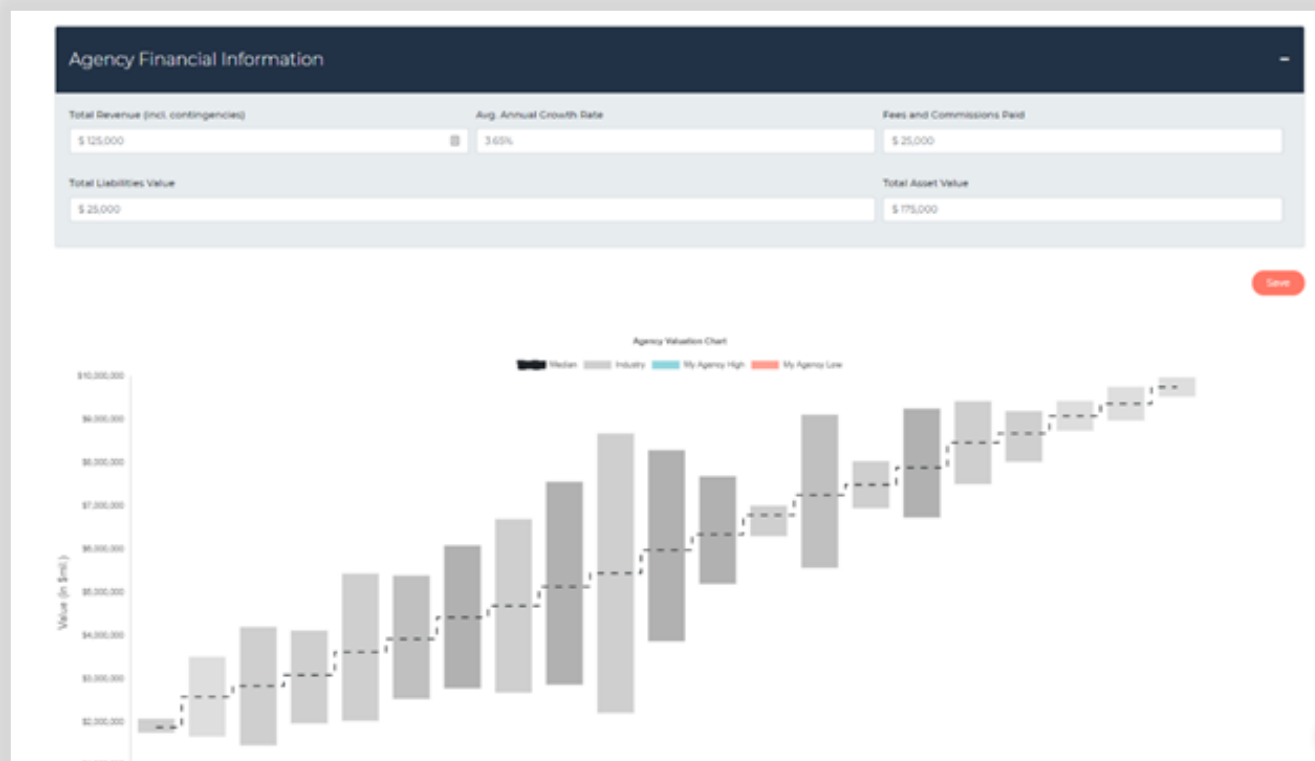
Productivity Insights provides some key productivity metrics about your agency based on four data points and offers both regional and state-wide comparisons that are updated daily in order to give agents the most up-to-date benchmarking information. This tool will continue to provide the same information with a new and improved layout.



To use this tool, select your state and county from the dropdowns, then enter your Full-Time Employee Count, Producer Count, Annual Written Premium and Annual Earned Commission. The charts and metrics will automatically update to provide you with important productivity benchmarks for your region and state. This tool is designed to help you understand how adjustments to these figures can affect your agency's productivity and how you compare to similarly sized agencies.

## Agency Valuation Calculator (QuickClicks Valuation)

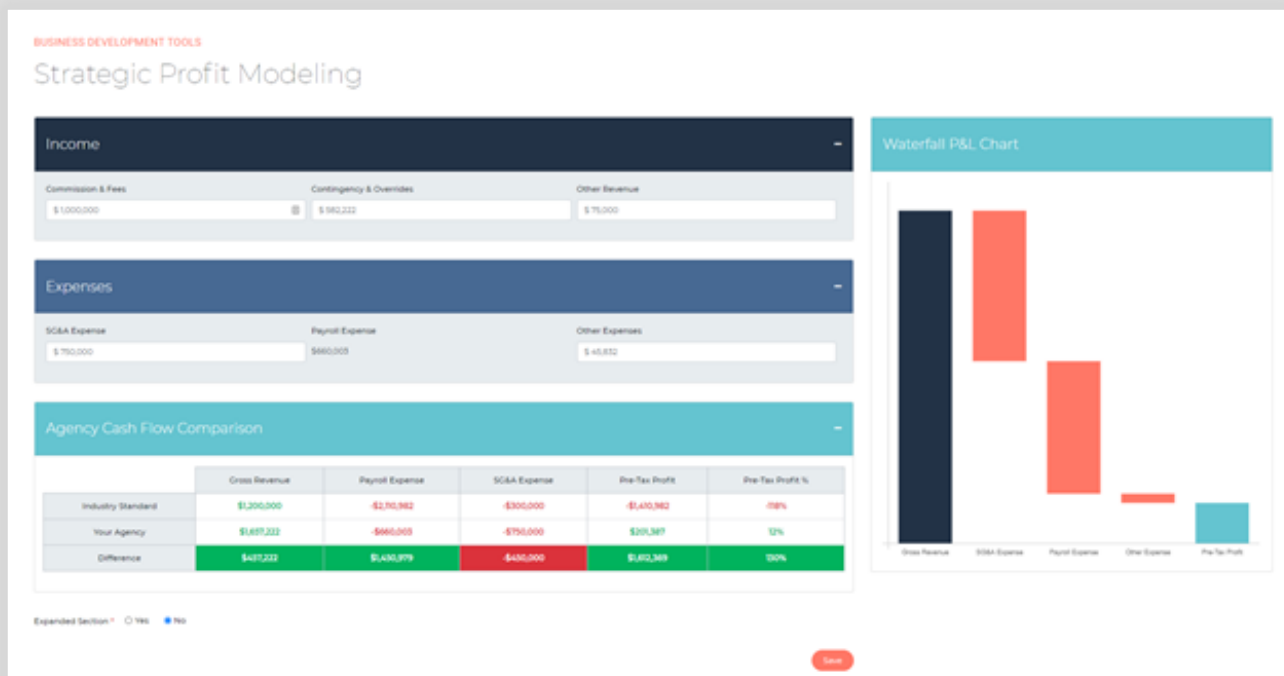
Our Agency Valuation Calculator provides a fair market value range for your agency based on current market conditions using five key data points. In addition to your agency's fair market value range, the improved visual will also provide industry benchmarking information of similarly sized agencies.



To use this tool, enter your Total Revenue, Average Annual Growth Rate, Fees and Commissions Paid, Total Liabilities and Total Assets. The waterfall chart will populate and show your agency's high and low fair market value ranges, as well as industry ranges and median values. This tool is designed to help you understand how adjustments to these figures can affect your agency's fair market value.

## Strategic Profit Modeling Tool (QuickClicks CashFlow)

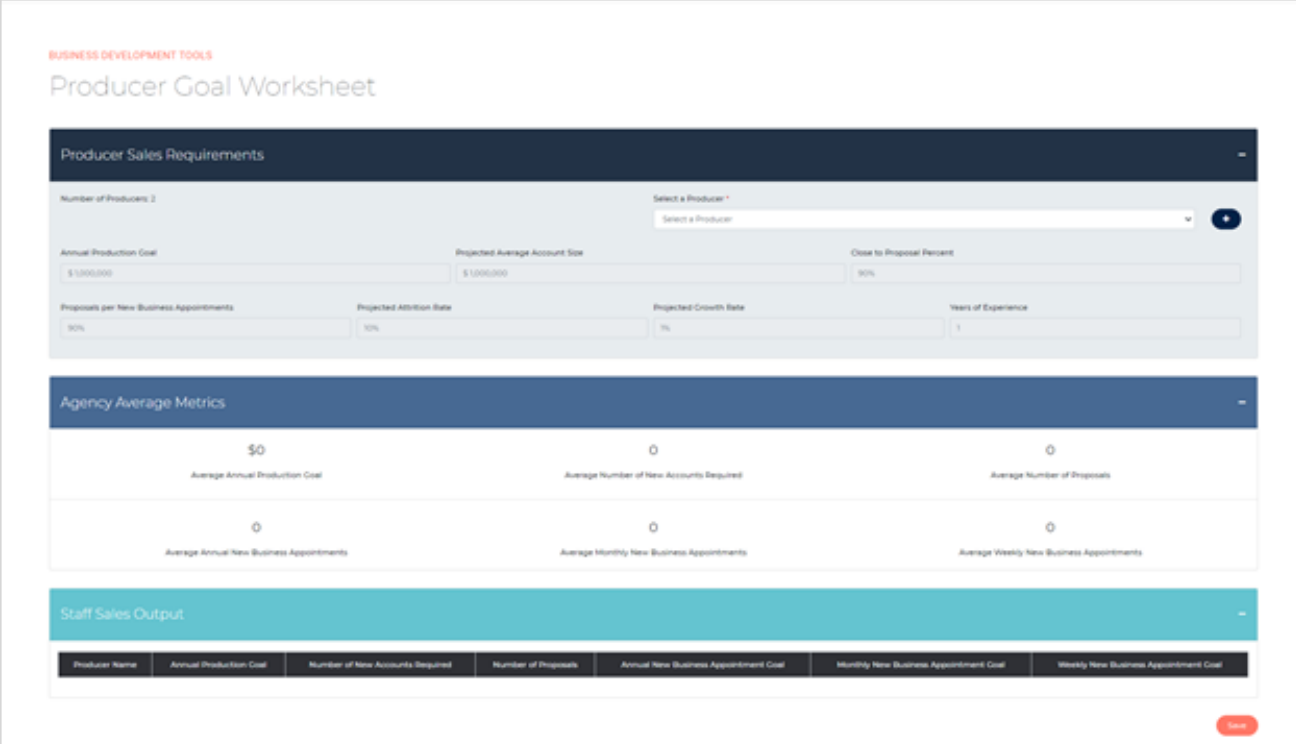
The Strategic Profit Modeling tool, previously called QuickClicks CashFlow, uses six key data points to provide an instant visual on how your agency can arrive at a net profit margin. The chart breaks down the cumulative effect of expenses that contribute to fluctuations in your profit versus an industry standard proforma view. We have reduced the number of required inputs, improved the overall flow and added a separate expanded section if you want to take a deeper dive into your employee payroll comparison and how that affects your overall cash flow.



To use this tool, enter your agency's income (Commission & Fees, Contingency & Overrides, Other Revenue) and expenses (SG&A Expense, Other Expenses). Your Payroll Expense is pre-populated based on your prior RISE Profile and/or Salary Survey submission. If you want to update or enter detailed payroll information, select "Yes" for the expanded section and provide your employee counts and payroll dollars.

## Producer Goal Worksheet

The Producer Goal Worksheet provides an easy way to create realistic goals for each of your producers as well as calculate your overall producer averages. Using a handful of key data points, the tool offers weekly, monthly and annual milestones by producer to help you stay on track and reach your year-end goals. If you've previously added your employee roster to our database, your producers will automatically pre-populate in the drop-down instead of having to manually add each one!



**BUSINESS DEVELOPMENT TOOLS**

### Producer Goal Worksheet

**Producer Sales Requirements**

Number of Producers: 2 Select a Producer \*

Annual Production Goal: \$1,000,000 Projected Average Account Size: \$1,000,000 Close to Proposal Percent: 90%

Proposals per New Business Appointment: 90% Projected Attrition Rate: 90% Projected Growth Rate: 1% Years of Experience: 1

**Agency Average Metrics**

Average Annual Production Goal: \$0

Average Number of New Accounts Required: 0

Average Number of Proposals: 0

Average Annual New Business Appointments: 0

Average Monthly New Business Appointments: 0

Average Weekly New Business Appointments: 0

**Staff Sales Output**

Producer Name	Annual Production Goal	Number of New Accounts Required	Number of Proposals	Annual New Business Appointment Goal	Monthly New Business Appointment Goal	Weekly New Business Appointment Goal

**Save**

To complete your Producer Goal Worksheet, select a producer from the dropdown and enter the seven sales requirements for that individual. Once complete, click the "Save" button and select the next producer from the list. Your overall Agency Average Metrics and Staff Sales Output will automatically update to provide you with accurate sales goals.

**PLEASE NOTE:** The "Select a Producer" dropdown is pre-populated based on your employee roster submitted as part of the RISE Profile and/or Salary Survey. If you want to add or remove producers, please submit an updated Salary Survey.