

A photograph of a young couple sitting on a light-colored sofa, smiling and looking towards a man in a dark suit who is sitting across from them. The man in the suit is gesturing with his right hand. They are in a bright room with large windows in the background. A small potted plant is on the sofa in front of the couple.

Case: Life Insurance Company – Agency Business

Sample KPIs

1



No. of Policies Sold

2



Premium Collected

3



Agent Activation

4



Login Value

5



Login Cases Count

6



Sales Calls

7



13 Month Persistency

Pilot: A-B Testing

Test group of 150 Reps were on-boarded on worxogo platform



Control group of a comparable team of 150 Reps were also monitored without onboarding on worxogo platform

Success

User Adoption

Number of users registered



Recruitment

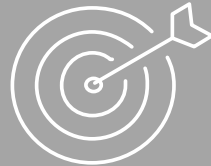
*
Total monthly recruitments done per office and per ADM (Agency Development Manager)

Number of quality recruitments per office, and per ADM



Engagement

Number of users regularly logging in
Total logins by a user/month
Rolling Engagements



Input Metrics

Number of recruitment calls
Number of sales calls
Number of customer meetings
Number of leads generated
Number of leads followed up



Productivity

Active Agent Man Months
% increase per employee/ agent/ ADM



Shift in Bell Curve

% increase in monthly targets by employee and Agency Development Manager



Pilot Results after 3 Months

Increase in the %
Users achieving
Targets

