

Hawkes Bay based Advanced Insurance is a fiercely independent insurance broking firm specialising in Life, Income Protection, Trauma and Medical insurances.



**Advanced Insurance Ltd**  
**Timing is everything**

Some of the big underwriters provide substantial incentives and systems to brokers who provide them with large amounts of business. However David McGuffie, owner of Advanced Insurance, prefers to do his own thing so that he can give completely independent advice and provide clients the best solution for them by always offering products from a full range of underwriters.

Of course this approach has its challenges as it means that you have to acquire or develop your own systems, procedures and support structures. At the same time this also provides the opportunity to do things in a way that is better suited to your clients, you and your business.

David is not an avid computer user and likes computer based solutions to be quick and simple to use. When he was looking for a simple way to keep him on target with his sales he turned to Simplify Limited for the solution.

We developed a **Sales Dashboard** to keep track of sales activity and to project the full year result. A traffic light arrangement indicates how well the actual results are tracking against the target. Green, Orange, Red and Black lights give simple visual feedback on how well the sales process is going. In addition graphs show how current activity levels compare with the activity required to meet sales targets. The system offers flexibility by allowing the user to tailor the thresholds for the traffic lights and to choose from 4 different methods of calculating the projection.

After starting to use the **Sales Dashboard** David stated *“This is the most exciting thing I have come across in all my years of sales to motivate me to keep going when all around me is crazy. Gavin has put together the best phoning, activity & sales motivating tool I have ever seen.”*

### Example of a Sales Dashboard

#### Sellem Co Ltd

Activity Dashboard for the period ended 01 June 2010



Activity	Actual			Projection Full Year
	This Week	This Month	This Year	
Calls Made	10	10	36	388
Appointments	8	8	31	339
Proposals Accepted	1	1	16	172
Total Sales	20,271	20,271	95,563	1,029,366
Gross Profit	11,289	11,289	44,463	478,772

  

Metrics	This Week	This Month	This Year	Projection Full Year
Call Conversion	80.00%	80.00%	86.17%	86.00%
Proposal Conversion	12.50%	12.50%	51.67%	51.60%
Average Sale	20,271	20,271	5,972	5,972
Average GP%	46.51%	46.51%	46.51%	46.51%

