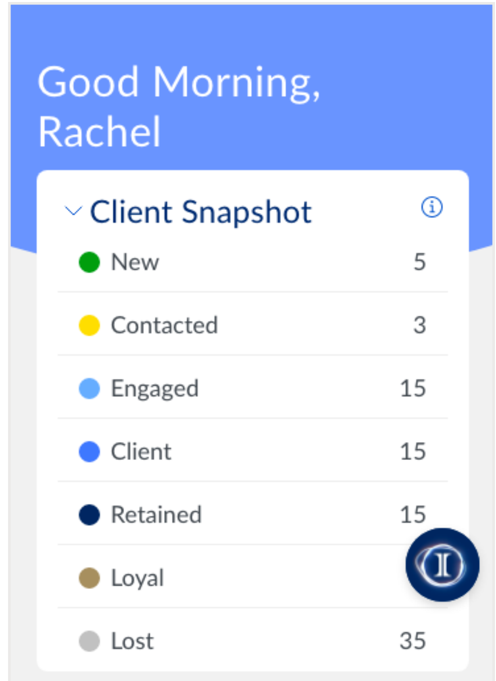
What's New Guide

Dashboard

Client Snapshot

The Client Snapshot still helps agents quickly jump to a list of all Contacts in a particular Stage of the sales cycle, and the Stage can still be set automatically by the plaftform or manually by the agent, but the Stages have been updated so they can apply to both Health and Life Contacts:



New: Default value for new Contacts added to Integrity. Helps agents find their leads quickly.
Contacted: Contacts the agent has reached out to through Integrity.

- These Contacts have one or more call recordings linked to them (either incoming or outgoing), and / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).

Engaged: A Contact with one of the following actions completed:

- Signed SOA (Health Contacts)
- Completed SOA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

Client: The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.
Retained:

- Health Contacts: At least one annual renewal
- Life Contacts: Two consecutive years of having a policy

Loyal: Three or more years of renewals / history plus at least one active or in progress policy
Lost: This stage can only be set by the agent. After setting the Contact's stage to Lost, the agent can choose from a list of reasons the Contact was lost.

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Policy Snapshot

Policy Snapshot now includes both Health and Life policies available through Policy Management. Health policies have a cross icon and Life policies have a heart icon so that agents who sell both product types can easily tell the difference.