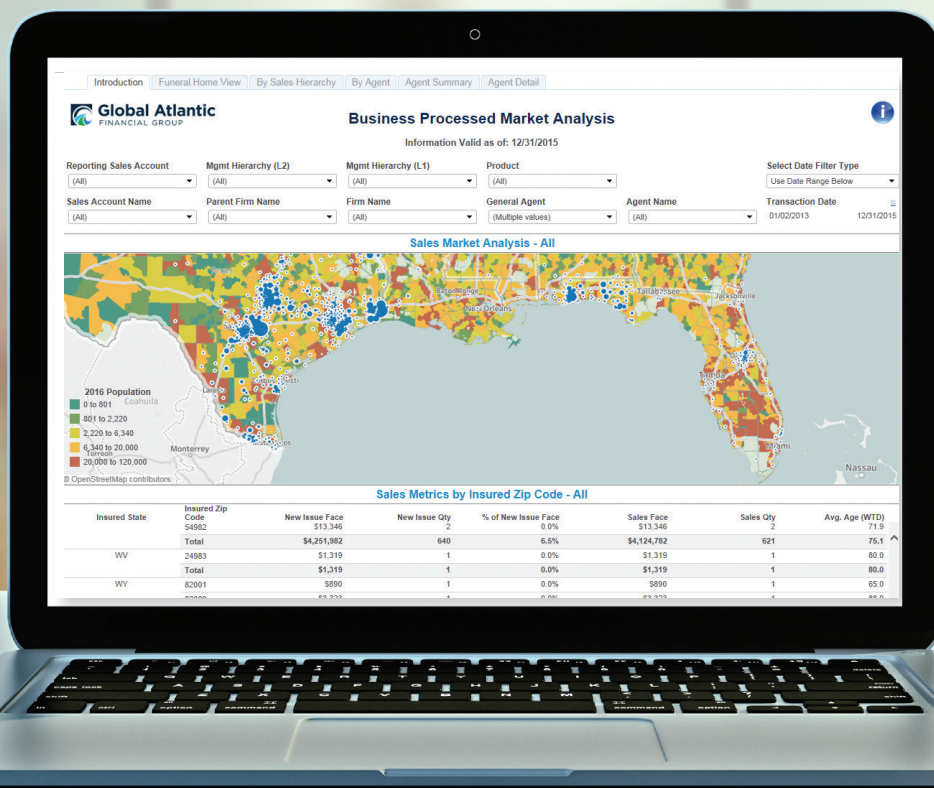


# The InSight Advantage

*Learn how InSight Analytics can help you know your business, so you can grow your business*



**ANALYZE**

YOUR BUSINESS

**ALIGN**

CONVERSATIONS

**CREATE**

AN ACTION PLAN

**Congratulations!** You've taken the first step and accessed **InSight Analytics**, our premium online reporting and business analytics tool. We encourage you to go one step further and begin using the powerful reporting tools available in **InSight** to help you drive sales, grow business and analyze trends more efficiently. Use this guide to find the answers you need to get started today.

Report availability is based on security access. Not all reports may be available to everyone.



# Analyze Your Sales

## SALES REPORTS - VIEWING BUSINESS TRENDS

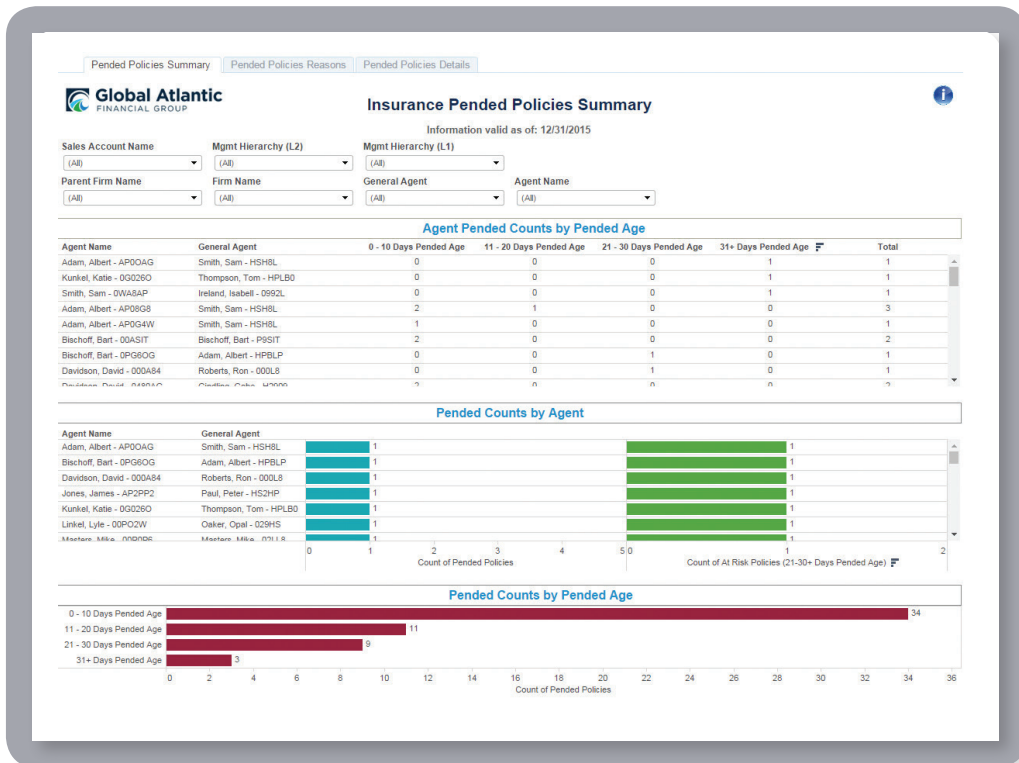
Take the guesswork out of how much and what kind of business you and your team members are writing. Go to [Sales Reports](#) for the information you need to confidently make decisions and create actionable roadmaps for success.

- The **Key Metrics** report shows trends and important measures in one convenient view. Sales dollars and quantities are updated daily, and the metrics capture pertinent data for the last full 12 months. Monitor your business every day of the month and get ahead of your goals before the month has passed.
- Dig into the mix and net metrics by going into the **Sales Dashboard**. The **Face Dashboard** lays out the key metrics in a quantitative view for a full 13 months. The **Sales Account View**, **Firm View** and **Agent View** contain all of the detailed data needed to evaluate trends at all levels of your account.
- The **Sales Variance** report shows the positive and negative variance in the states where you do business. See which agents and firms are productive, and see where productivity is down to identify areas for improvement.
- The **Business Processed** report shows incoming business by state. Use zip codes and ages to quickly target a specific area for your next ad campaign and to find new opportunities for growth. View policy-level detail on the **Agent Detail** tab to identify underperforming agents. Also, use this report to identify training opportunities and to share learning from your agents that are performing well.





# Analyze Sales



## PENDED REPORTS – GET PAID FASTER

Use the reports in **Pended Policies** to make sure your submitted business is in good order and ready to be issued. After all, issued policies mean paid commissions!

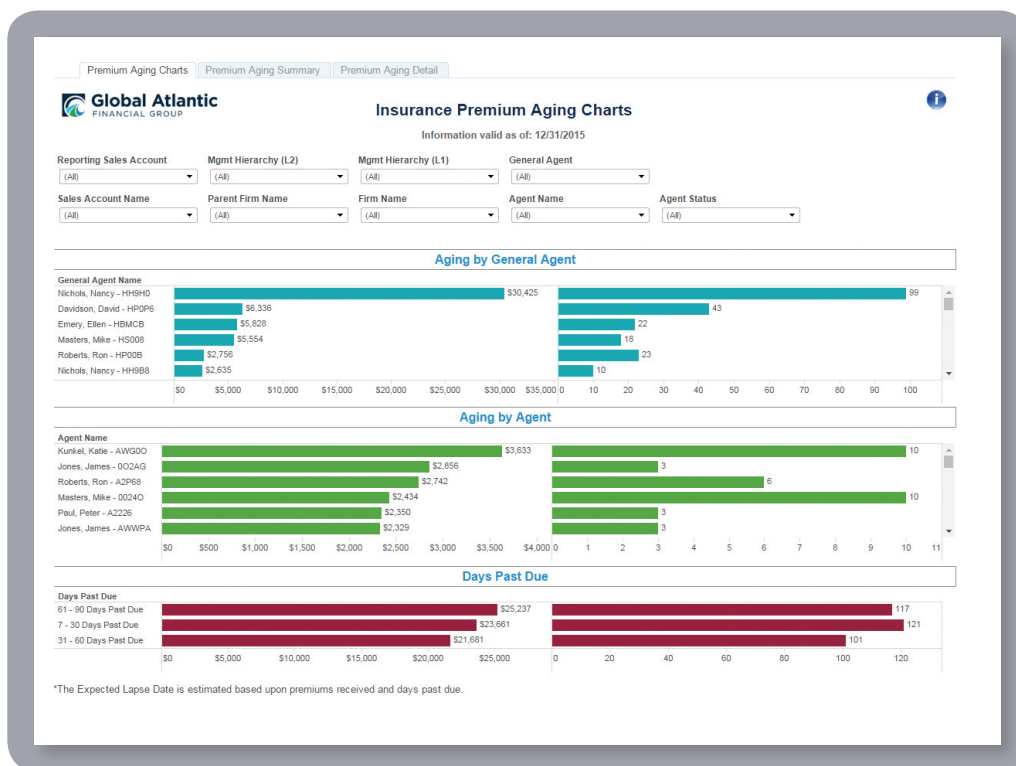
- The **Pended Policies Summary** report provides a quick look at in-house business with outstanding issues. See if agents need further guidance based on missing items, and resolve issues that are nearing the 30-day rejection window.
- **Pended Policies Reasons** outlines pended reasons in a quick and easy chart, providing the information you need to remind your agents to fill in missing pieces. Analyze pended reason trends to identify additional training opportunities.
- Avoid digging through files for phone numbers and addresses, now that this information is right at your fingertips. Find policyholder information and policy face amounts in the **Pended Policies Details** report.

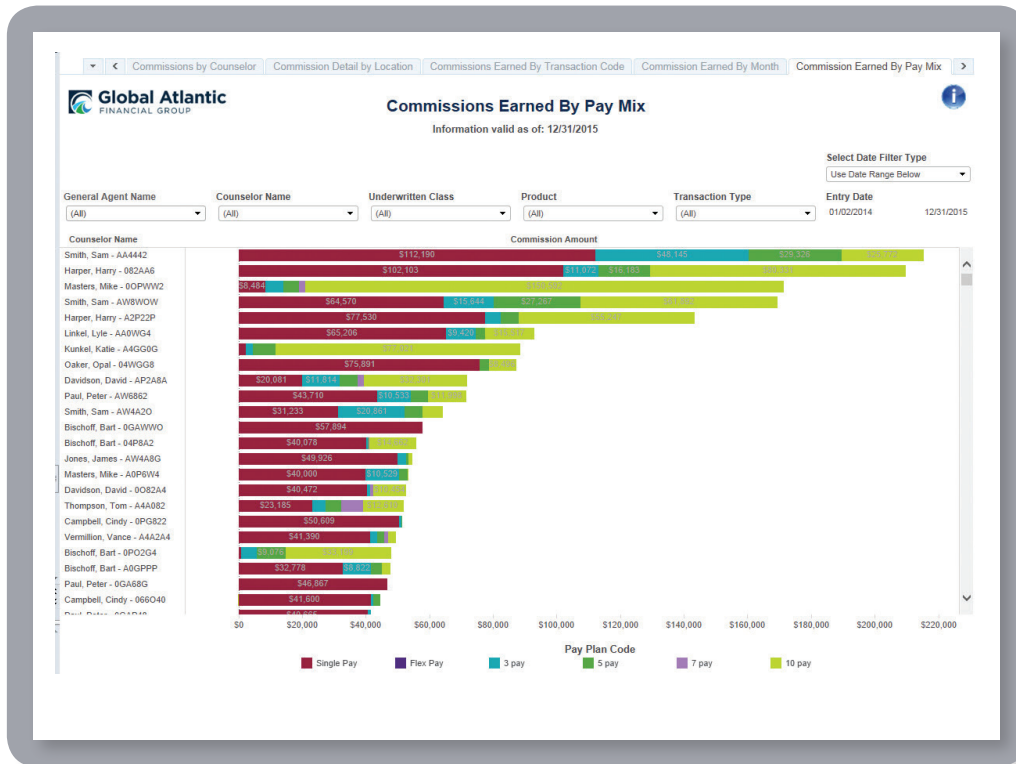
# Manage Your Business

## PREMIUM AGING REPORT - CONSERVE BUSINESS

We know that your focus is on new sales, but don't forget about conserving the business you already have. One way to do this is to track policies that may be on the verge of lapsing.

- **Premium Aging Charts** provide a quick overview of aging policies. The **Aging by Agent** chart identifies who wrote the business. Evaluate trends and highlight areas where agents may need assistance with product suitability or explanation of payment options.
- The **Premium Aging Summary** and **Premium Aging Detail** reports provide a detailed look at each agent and the insured. Owner information is readily available, so making follow-up phone calls to conserve business is simpler than ever.





## COMMISSION REPORTS - MONITOR AGENT BUSINESS

With InSight, you can estimate commission amounts for the week without waiting on mailed or faxed statements.

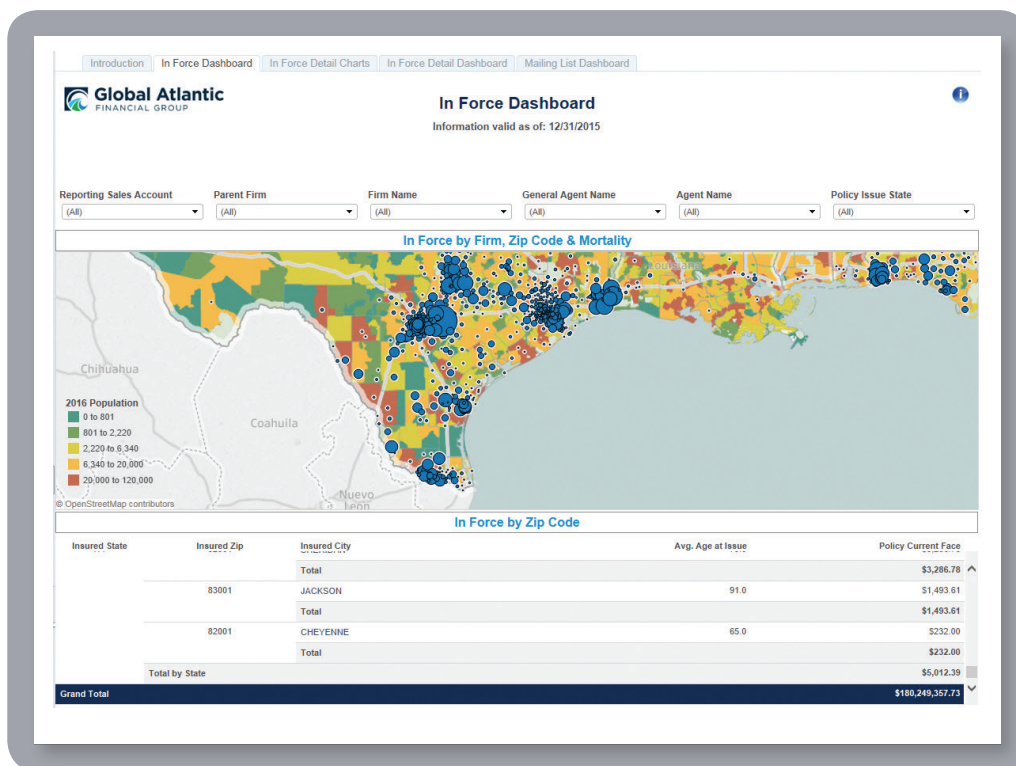
- The **Commissions Earned by Transaction Code** chart breaks down positive and negative values and allows you to have real conversations with your agents about their business and commissions.
- The **Commissions Earned by Pay Mix** breaks down commission amounts by each agent based on the pay plan. You can easily differentiate between agents writing only single pay policies, those writing mostly 10-pays with the potential to fall off the books, and those writing a good mix of business.
- **Gross Commissions** and **Other Activity Commissions** break down earnings at a policy-by-policy level.

# Identify Opportunities

## IN FORCE REPORTS - MARKETING TOOL

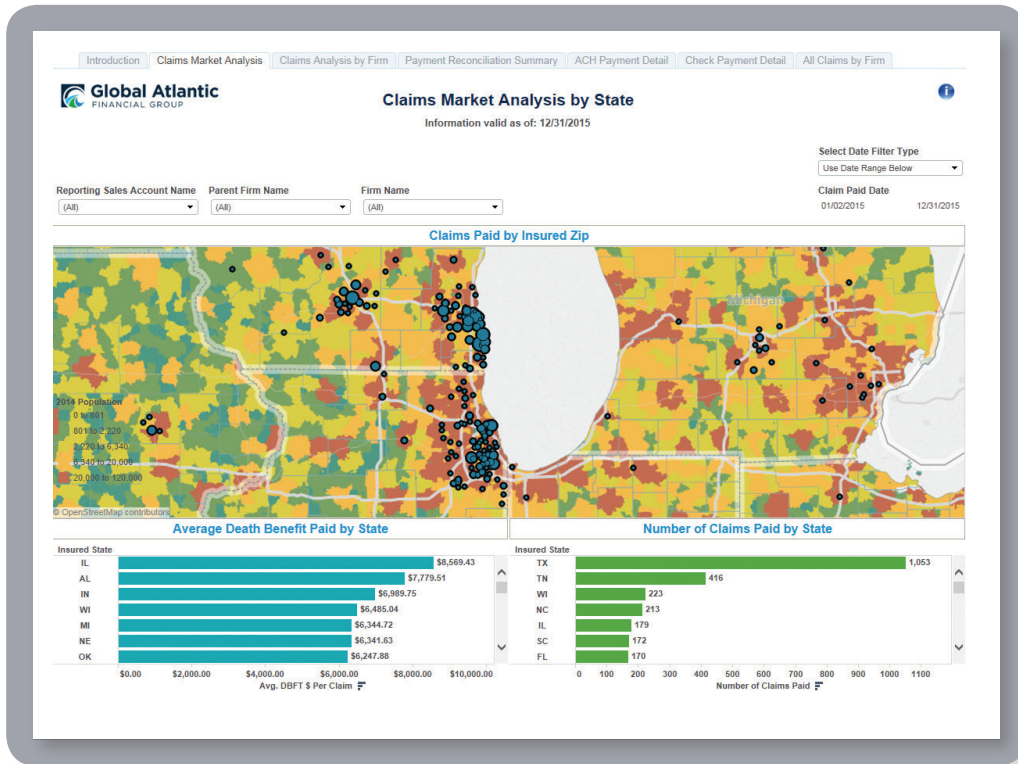
Once new business is written and policy owners begin making payments, you may wonder what comes next. **In Force** reports can help answer that question by providing ways to build on your successes and reach untapped markets.

- The **In Force Dashboard** allows you to see, by zip code, where your business “lives.” Easily view areas of saturation or find untapped markets. View average age and current face amount based on the zip codes to assist with targeted campaigns.
- **In Force Detail Charts** show you summary level data by firm or state. Take a deeper dive into policies on the **In Force Detail Dashboard**.
- Reinforce your commitment to your existing customers by sending newsletters or postcards using the **Mailing List Dashboard**. This is a simple touch point that reaffirms your commitment to them beyond the sale and may encourage referrals.





# Identify Opportunities



## CLAIMS REPORTS – RAMP UP YOUR AFTERCARE BUSINESS

Claims may not drive sales, but managing death claims is an important part of your preneed business. We have made reconciling your books even easier through **Claims** payments.

- See where your insureds lived, by zip code, using the **Claims Market Analysis**. This information could lead to a target area for new marketing opportunities.
- Quickly reconcile your bank accounts with incoming claim payments using the **Payment Reconciliation Summary**. Detailed data is available in the **ACH Payment Detail** and **Check Payment Detail** tabs.
- **All Claims by Firm** provides policy details by firm. Use this information to provide aftercare services, and follow-up with families about their satisfaction with their services or other items.

## RECOMMENDED SUBSCRIPTIONS

Sometimes, all you need is a quick glance at your data. Subscribe to reports of particular importance to you and have your data delivered to your inbox on regular intervals. Some suggested reports and interval timing include:

- Sales Reports - Face Key Metrics (Daily or Weekly)
- Sales Reports - Sales Dashboard - Monthly Face Sales Report (Monthly)
- Pended Policies - Pended Policies Summary (Daily or Weekly)
- Premium Aging - Premium Aging Charts (Daily or Weekly)

## QUESTIONS?

View tips and data definitions by hovering over the information button.



Access training materials, videos and other InSight resources on the reporting page of the portal, [globalatlantic.com/preneed/reporting](https://globalatlantic.com/preneed/reporting)

## CONTACT US

Contact Sales Support at **(866) 449-3722**, option 1 or [preneedsales.support@gafg.com](mailto:preneedsales.support@gafg.com).

For Technical Support contact [eTech@gafg.com](mailto:eTech@gafg.com) or **(866) 449-3722**, option 2 then option 1.

For general questions regarding InSight Analytics email [InSight@gafg.com](mailto:InSight@gafg.com).





When you know  
your business

**You can grow  
your business**

March

April

May

June

July

August

September

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