



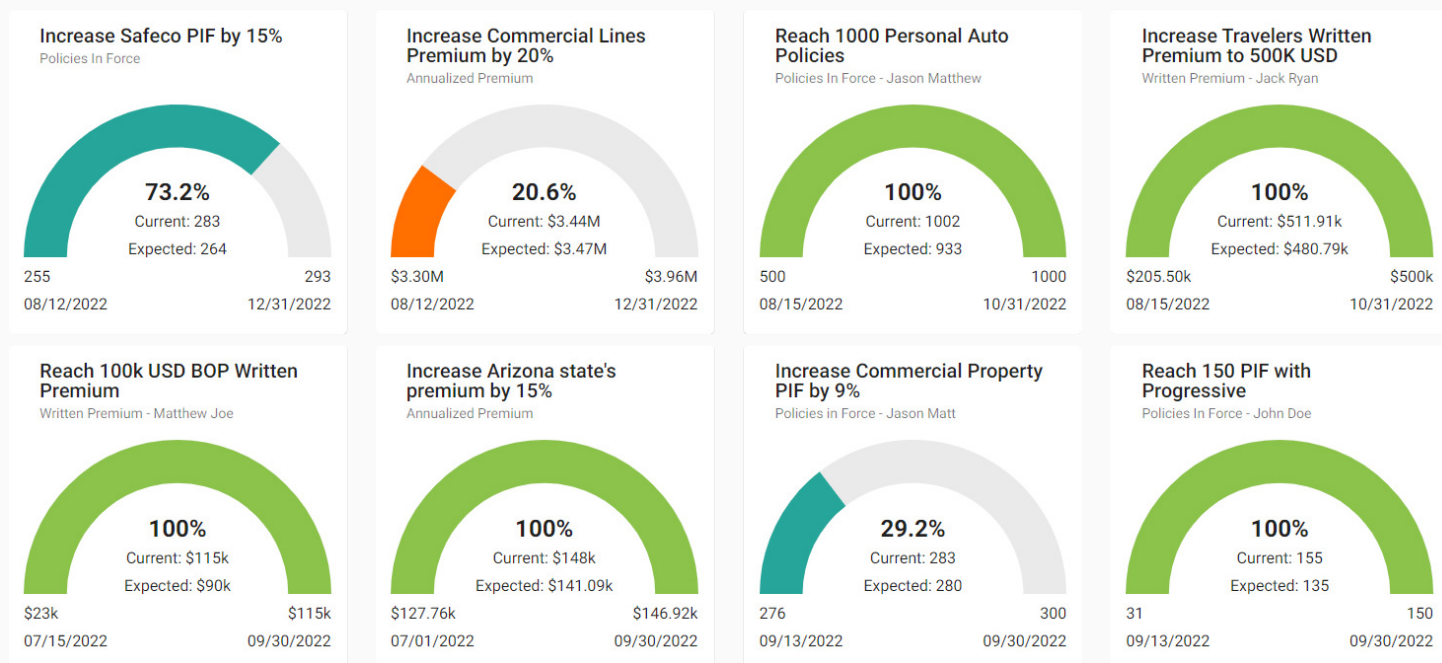
# PERFORMANCE GOALS

*Set, Track, Succeed*

**Performance Goals is a tool that lets agencies set growth targets, measure their success through an easy-to-read dashboard, and track to completion.**

Like any good agency, you already have business goals – but how can you ensure results along the way? You need daily visibility into specific metrics to help define your agency’s success. Tracking should never be the “heavy lifting” of your agency hitting its numbers. That’s why Performance Goals automatically calculates and reports progress, tapping into existing data inside your EZLynx Management System.

A dashboard brings goals into focus each day, so your team can concentrate on how their sales strategies and performance are netting results.











## Key Areas for Growth

With Performance Goals, your agency can set targets in three key areas of your business:

- Policies in Force
- Annualized Premium
- Written Premium

You'll have the flexibility to set your goals as absolute increases, percentage increases, or by target number.

In the insurance world, performance is all about growth. Now you can keep your most critical growth metrics front-and-center for your agency.

 <b>Policies In Force</b> Measure your agency's business growth or track retention.	 <b>New Business Annualized Premium</b> Measure or track your new business sales growth weekly, monthly and more.
 <b>Written Premium</b> Measure or track your sales growth weekly, monthly and more.	 <b>New Business Policies in Force</b> Measure your agency's new business sales growth.
 <b>Annualized Premium</b> Measure your agency's premium growth across Carriers, Producers, and more.	 <b>New Business Written Premium</b> Measure your agency's new business premium growth across Carriers, Producers, and more.



## Make Your Goals Specific

You can tailor your agency's goals by:

- Carrier
- Policy Type
- Line of Business
- State

Agents frequently report meeting carrier production demands as a key challenge they face. With Performance Goals, you can establish specific targets by carrier and constantly monitor progress. You'll be better positioned for your annual performance review and the profits that go along with it.

Performance goals can also be assigned to your agency overall or to specific staff members.



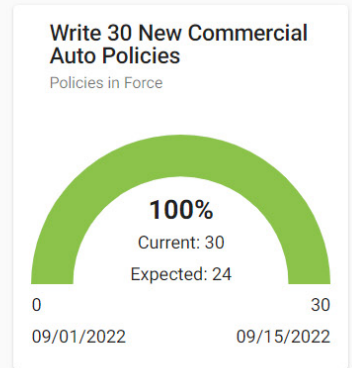
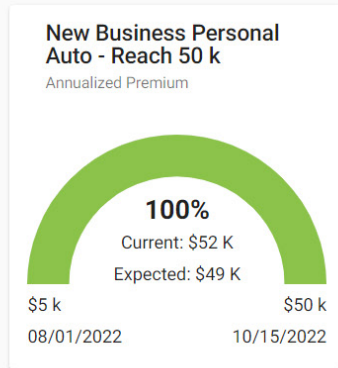


## New Business

While an agency is often measured by its book of business, there is always a need to focus on new sales. That's why we have a dedicated section for New Business.

Agencies can measure the sales performance of their producers by setting goals for them solely around new policies. Of course, these goals can be broken down by Carrier, Policy Type, Line of Business, or State.

Because new business is a constant pursuit, these goals can be set weekly, monthly, quarterly, or anything in between. And progress towards them can be monitored daily.



Performance Goals provides clear insights into your book of business and the output of your producers, automatically calculating and reporting progress along the way. Daily monitoring allows you to plan for success without guessing where your weak spots might be. Performance Goals is your agency's tool to prepare for scalable growth, one milestone at a time.



877.932.2382 » EZLYNX.COM

Copyright © 2022 Applied Systems, Inc. All rights reserved.