

REPORTING

Salesforce KPI Reporting

BluInsurance's visually appealing live dashboards provide critical insights into your day-to-day business operations. . BluInsurance allows you to set metrics for your company, team or individual to track leads by source, conversion by source and activities for the company. Analyze your marketing spend, and sales force efficiency to better understand key areas of improvement.

Closed Policies By Source [🔗](#)



Renewal Reporting

Never miss a renewal again through BluInsurance's automated renewal reports. Sixty days prior to a policy renewing BluInsurance will automatically send each team member an email with an attached report with all relevant information such as policy name, policy type, premium, and renewal date.

Policies Renewing [🔗](#)

POLICY NAME	POLICY RENEWAL DATE	AMOUNT
Kikelia Castillon Policy	Jan 5, 2019	\$1,500.00
Reece Fiveash Policy	Feb 17, 2019	\$1,500.00
Britte Diloway Policy	Dec 14, 2018	\$1,500.00
Stesha Merriman Policy	Feb 11, 2019	\$1,500.00
Gerardo Giacomuzzo Policy	Feb 15, 2019	\$1,500.00

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