



Our [mission] n.

the important task with which we have been charged to accomplish

is to build covenantal relationships with producers, providing them superior products and world-class service, with excellence and integrity, in order to help them achieve true success.

Meet Advisor Axis and the IPAC Intelligent Dashboard (Insurance Pipeline Analytics Center)



Overall functionality

AdvisorAxis is an in-browser dashboard for insurance pipeline analytics: no installs, no server, and no IT lift. Simply upload (or paste) a CSV and the custom application parses agent's cases, dates, face amounts, modal premiums (annualizing by payment mode), normalizes statuses, and builds a working dataset instantly. It renders clean metric cards, charts, and leaderboards, and every important tile has a **View** action that opens a simple, exportable listing for fast follow-up. Management Agencies can act on daily tasks for assisting their downline agents & advisors as well as assess trends.

What leaders and agents/advisors/producers see day-to-day:

- **Critical “Stuck Cases” alert** shows the **annualized premium** at risk (labeled “premium”) plus “X cases stuck.” Selecting **View** opens a standard list (newest first) with **one-click CSV export**.
- **Metric cards** for **Total Pipeline, Pending, Approved, Submitted, Issued, Postponed, Shopping**—each with a **View** that lists exactly those records and enables export.
- **Pending premium math** aligns to sales reality and **excludes Postponed & Shopping** and includes **Pending, Approved, and Issued** for totals, giving a consistent view of production pipeline dollars.
- **Charts that matter:** Status Distribution, Monthly Case Trend, **Monthly Face vs Annualized Premium**, Premium by Status, Aging Distribution, and 30-day Daily Velocity.
- **Advisor performance:** conversion rates, case volumes, and premium/face totals, plus profile cards with “View Details” and export.
- **Pending Leaderboard** with per-producer sparklines (modal vs annualized), ranks, and quick drill-downs.
- All views support print-friendly output and responsive layouts for mobile through 4K.



Agency Manager Reports (proactive & predictive)

Each of the following opens an actionable, exportable list so upline managers can assign follow-ups in minutes:

1. **EOM Issued Premium Forecast** – Month-to-date run-rate projection to month-end
2. **High-Value Pending (Top Quartile)** – Pending cases in the top 25% by annualized premium
3. **Aging Exceptions** – Pending>30d, Approved>45d, Shopping>60d, Postponed>90d
4. **Advisor Pipeline at Risk** – Advisors with low conversion and large P/A/I pipeline premium
5. **Carrier Bottlenecks** – Carriers with the highest average days-in-status (non-issued)
6. **Likely to Convert (Next 14 Days)** – Heuristic shortlist (Approved ≤20d; Pending 8-30d)
7. **MTD Scorecard** – All cases created this month (all statuses)
8. **Win-Back Postponed** – Postponed >90d opportunities
9. **New Submissions (7 Days)** – Recent “Submitted” entries for quick triage
10. **Face Concentration Risk** – Top 10 cases as a % of total face

Together, these reports turn passive dashboards into an active **work queue** for your team—forecasting outcomes, surfacing risk, and pointing directly to the records that move issued premium faster.

The screenshot displays the 'Insurance Pipeline Analytics Center' dashboard, specifically the 'Manager Reports' section. The dashboard has a dark blue header with the company logo and name. Below the header is a navigation bar with tabs for Overview, Timeline Analysis, Advisor Performance, Pending Leaderboard, and Manager Reports (which is currently selected). The main content area is titled 'Manager Reports — Proactive & Predictive' and contains ten report cards arranged in two rows of five. Each card has a title, a brief description, key metrics, and a 'View' button. The reports are: 1. EOM Issued Premium Forecast (Projection \$54.6k, MTD \$4.7k, 21 biz days left), 2. High-Value Pending (Top Quartile) (4 cases, \$15.8k), 3. Aging Exceptions (11 cases, \$30.5k), 4. Advisor Pipeline at Risk (4 advisors, \$22.6k pipeline prem), 5. Carrier Bottlenecks (Mass Mutual (LIBRA) 448d, Protective Life Insurance Company 146d, Columbus Life Ins Co 68d), 6. Likely to Convert (Next 14 Days) (7 cases, \$11.4k), 7. MTD Scorecard (9 cases, \$25.4k), 8. Win-Back Postponed (6 cases, \$23.0k), 9. New Submissions (7 Days) (0 cases, \$0.0k), and 10. Face Concentration Risk (Top 10 hold 63% of face). At the bottom of the dashboard, there is a footer section with the text 'Questions, or want a demo?' and a 'Contact Us' button.

Insurance Pipeline Analytics Center
Advisor Performance & Case Flow Management, Face & Annualized Premium

Overview Timeline Analysis Advisor Performance Pending Leaderboard **Manager Reports**

Manager Reports — Proactive & Predictive

- EOM Issued Premium Forecast**
Projection using month-to-date issued run-rate across remaining business days.
Projection \$54.6k • MTD \$4.7k • 21 biz days left
[View](#)
- High-Value Pending (Top Quartile)**
Pending cases in the top 25% by annualized premium for focused follow-ups.
4 cases • \$15.8k
[View](#)
- Aging Exceptions**
Pending>30d, Approved>45d, Shopping>60d, Postponed>90d — across the pipeline.
11 cases • \$30.5k
[View](#)
- Advisor Pipeline at Risk**
Advisors with low conversion & large P/A/I pipeline premium needing coaching.
4 advisors • \$22.6k pipeline prem
[View](#)
- Carrier Bottlenecks**
Carriers with the highest average days-in-status on non-issued business.
Mass Mutual (LIBRA) 448d, Protective Life Insurance Company 146d, Columbus Life Ins Co 68d
[View](#)
- Likely to Convert (Next 14 Days)**
Heuristic shortlist: Approved ≤20d or Pending 8-30d, ranked by premium.
7 cases • \$11.4k
[View](#)
- MTD Scorecard**
All cases created this month (all statuses) with totals for team meetings.
9 cases • \$25.4k
[View](#)
- Win-Back Postponed**
Postponed >90 days — high-touch win-back opportunities.
6 cases • \$23.0k
[View](#)
- New Submissions (7 Days)**
Recently submitted cases to ensure quick triage and assignment.
0 cases • \$0.0k
[View](#)
- Face Concentration Risk**
Share of total face held in the top 10 cases — concentration exposure.
Top 10 hold 63% of face
[View](#)

Questions, or want a demo?
We can walk you through AdvisorAxis and help plan a rollout.

[Contact Us](#) or email info@mindfulware.com