Simplifying Complex Products to Get More Sales:

Embeddable Visualizations and Insights

- Next Gen Visualization & Insights
- Simplified Sales Process
- Easy-to-Consume Illustrations
- Interactive Sales Dashboard

Illustrating products is an integral part of the sales process, but illustrations can be complex and difficult to understand. Visualization simplifies the presentation of complex products and provides your clients with a clear understanding of your value. The result... satisfied clients and successful agents.

Spotting trends in the sales process can take time, which slows down your ability to react to the market with product changes. Insight into the effectiveness of your product presentations provides powerful real-time data to inform your product and marketing decisions.

Introducing the next generation of visualization and insights. Used separately or together, these tools will unlock the power of your products, so you sell more.
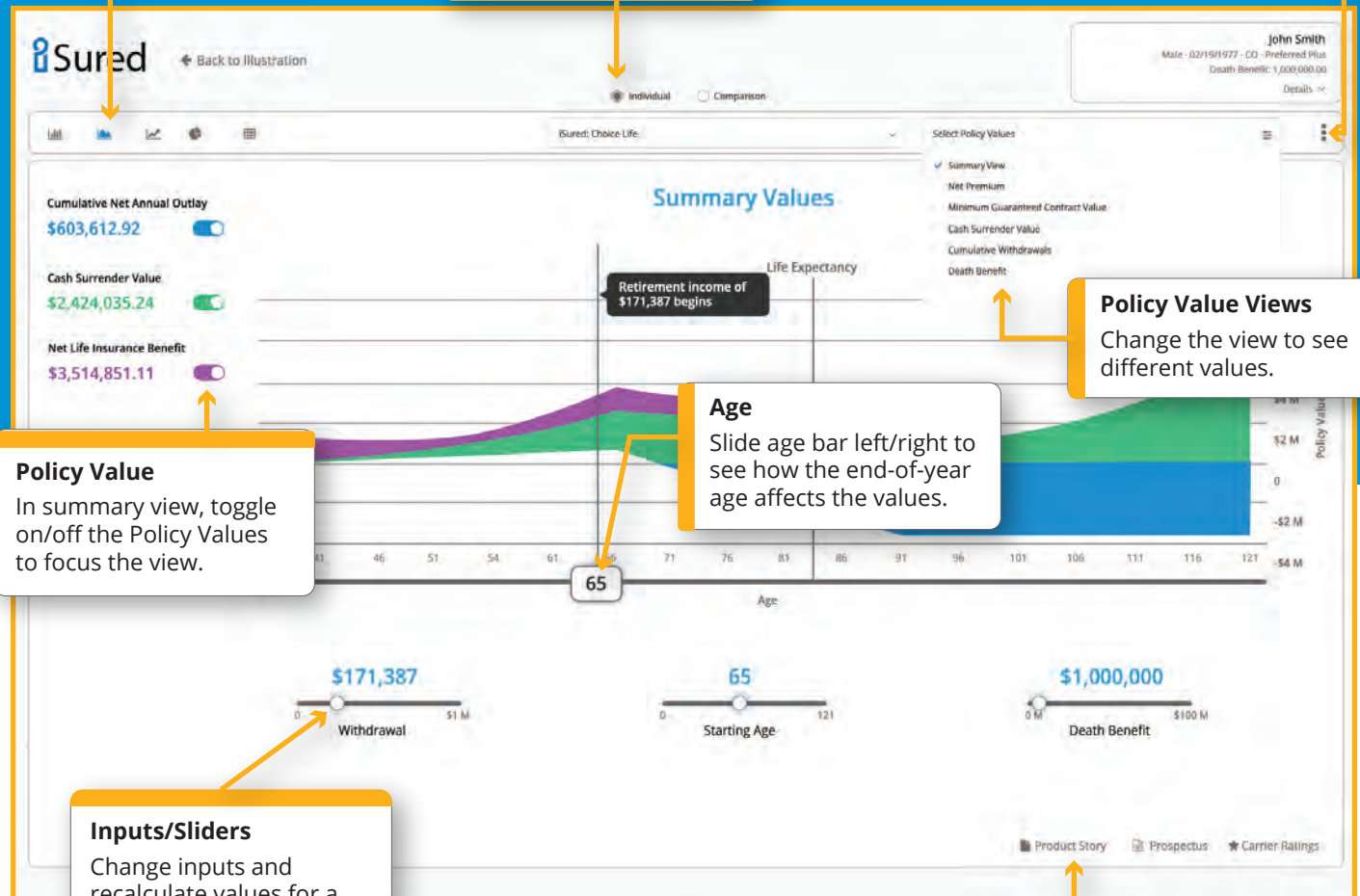
INSURANCE
TECHNOLOGIES

Visualizations

Sales Process
Select Quote, Illustration, Apply to move directly to that step of the sales process.

View
Toggle between graph types or table view.

Product Information
View individual product values or a comparison of multiple products.

Policy Value Views
Change the view to see different values.

Policy Value
In summary view, toggle on/off the Policy Values to focus the view.

Age
Slide age bar left/right to see how the end-of-year age affects the values.

Inputs/Sliders
Change inputs and recalculate values for a dynamic presentation of the product

Embed
Maximize your investment and embed the visualization tool inside other systems that need to tell your product story.

Product Story
Click to see what sets the product apart.

Visualization Tool

This next generation visualization simplifies the story of a complex illustration. It empowers agents to better explain the illustration and present your product to your ideal client. As a result, the client better understands what they are buying, and you sell more.

Using APIs, this tool can communicate with any illustration engine to unlock its calculation power and use your quote data in the visualization. The modern presentation of policy values can be used for an individual product or for comparison scenarios to improve understanding of the features and help the client make a buying decision.

Visualizations

Values
This tool will help agents explain the policy values and how they are representing the client's goals with the investment.

Product Story
Provide specific callouts and marketing material to explain your product, its features, and the story you want clients to see.

Visualization Tool

From the visualization screen, agents are a click away from your product story and other marketing material.

Access to your product and marketing materials will make illustrations more than a compliance requirement and easy to consume. Now agents are better equipped to present the product details to the client and explain its complex features. Clients better understand the product and are better informed when making a buying decision.

Insights

Data Views
Customize the views that are important to understand the data for your business.

Date Range
Select the date range you want to analyze.

Filters
Click on a graph to apply filters and get a more detailed view of the data.

Charts
Click on a chart to interact with it in real time for a more focused view.

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Sales Overview

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Settings

Reporting Views

Apr 4. 2022 - May 3. 2022

Sales

Illustrations	Quotes	Applications	Sales	Avg. Time to Sale
5,006	6,791	2,543	2,132	00:23:19

Top Distribution Channels
- Distributor A
- Distributor B
- Distributor C
- Distributor D
- Distributor F
- Distributor G
- Distributor H
- Distributor I

Products Illustrated & Applied
Choice Life
5,104 Illsutrations
- Illustrations
- Applications Submitted

Products Compared vs Won
- VUL/IUL
- Applied VUL/IUL

Products
- Annuity
- Deferred Income Annuity
- Fixed Annuity
- Whole Life
- Indexed Universal Life
- Immediate Annuity
- Term Life
- Fixed Indexed Annuity
- Multi-Year Guaranteed Annuity
- Long-Term Care
- Single Premium Immediate Annuity

Annual Product Sales
$13.5M
$9.5M
$5.1M
$1.7M

Sales By State

Insight Tool

The FireLight insights tool will show you a holistic view of your processes and sales.

You can discover what product is selling, when your products and features are compared, and when you are winning. This powerful data will help you customize your products to meet market demands and increase sales.