



Ready to subscribe to
QuickClicks BDT?

Follow these steps!



1

PLEASE NOTE:

Our website is optimized for modern internet browsers.

If you use an unsupported browser, our website may not display correctly.

We recommend using **Google Chrome** or **Mozilla Firefox** when accessing the IA|METRIC Portal.



2

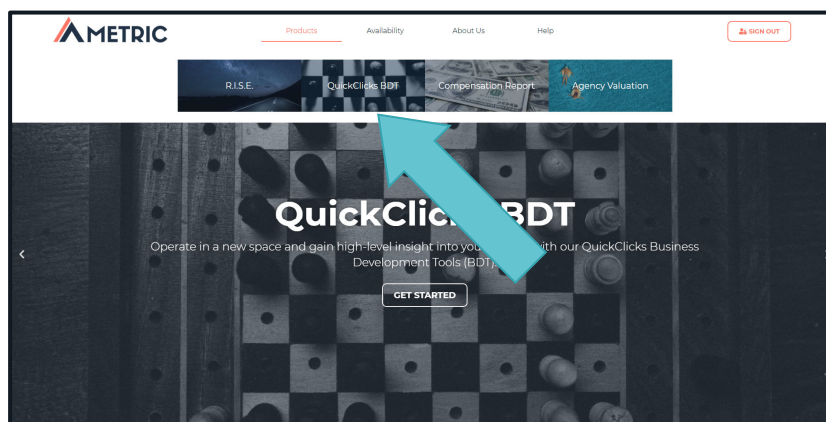
If you have never logged into the IA|METRIC Portal but have received direct communication from your state association about an account, you'll need to **reset your password** to access the new portal **by following the steps in the "How to reset your password" video!**

If you **have previously logged in**, follow the next steps!



3

Once you're logged into the IA|METRIC Portal, click "**Products**" then "**QuickClicks BDT**" in the top menu.



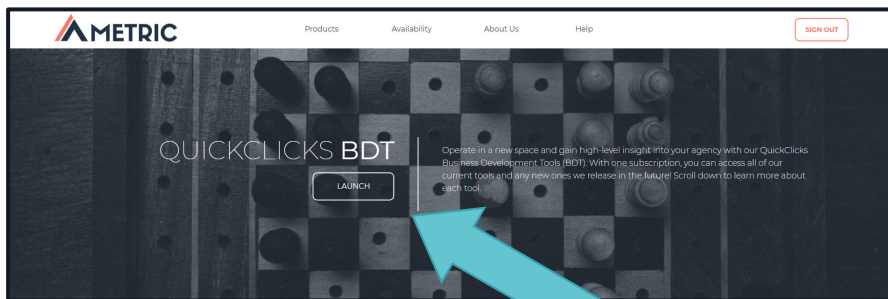
4

This will take you to a landing page that provides an overview of each online tool, as well as how to use **QuickClicks BDT** and other important information.



5

When you're ready to get started, click the "**Launch**" button at the top or bottom of the page.



6

Fill out the form in the pop-up window, then click the **“Subscribe”** button.

QUICKCLICKS

GET QUICKCLICKS BDT

Fill out the form below to get access to QuickClicks BDT!

Starting your agency with our QuickClicks Subscription, you can access all of our features. Scroll down to learn more about...

First Name Last Name

Agency Name Email Address
aka@youragency.com

City State Zip Code

SUBSCRIBE

WHAT'S INCLUDED

AGENCY VALUATION CALCULATOR



7

You should now see your **QuickClicks BDTs!**

METRIC

R.I.S.E. QuickClicks About Us Account Log Out

BUSINESS DEVELOPMENT TOOLS

Producer Goal Worksheet

The producer pick list is auto-populated based on an employee roster submitted as part of the Salary Survey or RISE Profile. To make changes to your roster, you will need to submit a free Salary Survey with detailed employee information. As an added bonus, you will receive a free Compensation Report!

Producer Sales Requirements

Number of Producers: 2 Select a Producer *

Annual Production Goal Projected Average Account Size Close to Proposal Percent

Proposals per New Business Appointments Projected Attrition Rate Projected Growth Rate Years of Experience

Agency Average Metrics



8

Use the navigation on the left-hand side to move between the tools.

The screenshot shows the METRIC website interface. On the left, there is a navigation menu with the following items: Producer Goal Worksheet, Strategic Profit Modeling, Agency Valuation Calculator, and Productivity Insights. A blue arrow points to this menu. The main content area is titled "Producer Goal Worksheet" and includes a sub-header "BUSINESS DEVELOPMENT TOOLS". Below this, there is a text box explaining that the producer pick list is auto-populated based on an employee roster. The main form area is titled "Producer Sales Requirements" and contains several input fields: "Number of Producers" (set to 2), "Select a Producer" (a dropdown menu), "Annual Production Goal" (set to \$1,000,000), "Projected Average Account Size" (set to \$100,000), "Close to Proposal Percent" (set to 95%), "Proposals per New Business Appointments" (set to 95%), "Projected Attrition Rate" (set to 10%), "Projected Growth Rate" (set to 1%), and "Years of Experience" (set to 1). At the bottom of the form, there is a section for "Agency Average Metrics" and a "Save" button.

9

If you want to save your data to return to it at a later time, click the "Save" button.

The screenshot shows the "Agency Average Metrics" section with the following data:

\$1,000,000	10	11.11
Average Annual Production Goal	Average Number of New Accounts Required	Average Number of Proposals
12.35	1.03	0.26
Average Annual New Business Appointments	Average Monthly New Business Appointments	Average Weekly New Business Appointments

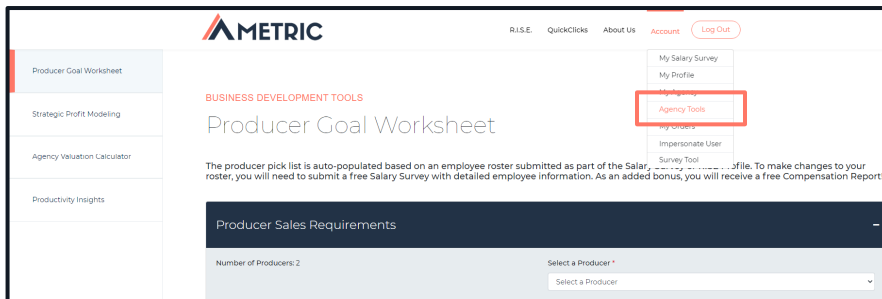
Below this is the "Staff Sales Output" section, which contains a table with the following data:

Producer Name	Annual Production Goal	Number of New Accounts Required	Number of Proposals	Annual New Business Appointment Goal	Monthly New Business Appointment Goal	Weekly New Business Appointment Goal
	\$1,000,000	10	11.11	12.35	1.03	0.26

A red box highlights the "Save" button at the bottom right of the "Staff Sales Output" table, with a blue arrow pointing to it.

10

If you want to access your **QuickClicks BDT** tools in the future, navigate directly to <https://data.intellagents.io/agency-tools> or select "**Agency Tools**" from the "**Account**" dropdown menu.



11



12