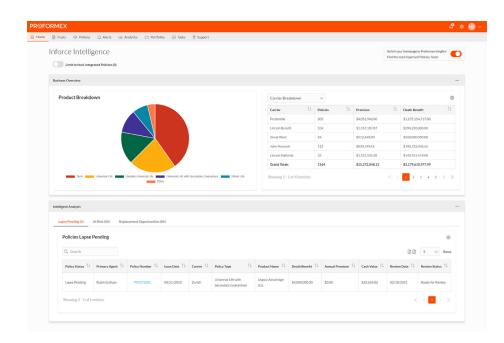


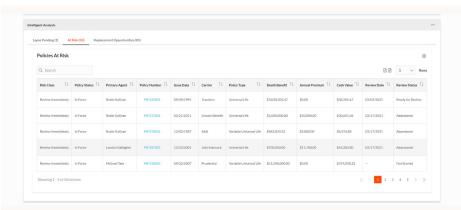
Proformex Best Practices

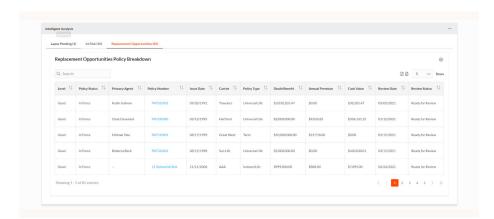
8

TOPIC: INFORCE INTELLIGENCE

SUGGESTED CADENCE: THE BEST PROFORMEX USERS DO THIS WEEKLY







To learn more about how to best utilize Proformex, visit <u>www.proformex.com/resources</u>

Business Overview

- Chart and table display your book of business overview
- O Toggle on top left will display your entire book of business as well as limit the view to only policies that have feeds enabled
- Proformex Best Practice is to limit view to feed-enabled policies only

Lapse Pending

- Table displays all policies that are in Lapse Pending status
- Proformex Best Practice table configuration is displayed

Policies At Risk

- Table displays all policies that could be at risk of lapsing
- Proformex Best Practice table configuration is displayed
- View 'Risk Class' column to see how Proformex has prioritized the suggested review timing

Replacement Opportunities

- Table displays all policies that could potentially be replaced
- Proformex Best Practice table configuration is displayed
- View 'Level' column to see how Proformex prioritized the lead