



## New Look Frontline Navigator

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October 4, 2012



# Agenda

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Objective

Features

Access

# Objective

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- **Navigator is a key business management tool for frontline sourcing population to increase their productivity.**
- **To provide daily opportunity tool.**
- **Planning for the month.**
- **Empowers you with information at your finger tips.**



# Access to Navigator

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- Navigator Access will be provided to all frontline sourcing Managers across all channels.
- Access to Navigator is through Pop Up
- Navigator can be accessed through a link on intranet
  - Intranet>Application>My Navigator

# Navigator Key Benefits

Solution	Key Benefits
Goal sheet Updates	Automated Goal sheet Updates
Contest updates	Track Contest Updates of Frontline & Partners
Input Management	Team wise FTM Plan  Input of Customer meetings
Team Management	Team Information including distribution leaders
Online Calendar	Track All Important Milestones for the Month
Daily Tracker	E2E tracking of Applications-Logins to Issuance
Distribution Build up	Seamless Online Login of FSP for all channels

The one stop shop for all information

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## Journey of New Frontline Navigator

# My Dashboard

Welcome „Mangala“  
April 03,2015

Home

Premium Payment Option

Quick Links

Log out

## Monthly Performance

(Logins and Issuances excludes goalsheet credits)

Target	Plan	Issuances	% Achievement	Logins
NO RECORDS FOUND!				

[← Previous Month](#)

No data to display.

Deficit Actual

[View Details](#)[Team Performance](#)[Login Calendar](#)[Tracker](#)

## Goal Sheet Performance

GTD WRP Target : 0

% Achievement : 0 %



## Monthly CDF Update

Total Login(FTM): 0

Pending CDF Count(FTM): 0

CDF Submitted(FTM): 0

[More Details](#)[← Previous Month](#)

## My Calendar

APRIL 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

B'days Appointments Discrepancies

Logins	Issuances	Pending Issuances
0	0	0

## Notifications

### Risk Awareness

- \* [Spurious call awareness](#)
- \* [Social Media guidelines](#)

### Meeting Summary

- \* Your 191 customer meeting(s) are overdue [Click here](#)

### Alerts

- \* Plan Submission for 24 Team members is pending for the month [Click Here](#)
- \* [Now FPD and renewal premium payment is easier by Ecollect payment option.](#)

### Opportunities

- [Incentives & BDA](#)  
FY '14-15 Variable Incentive & Bouns Slab(BDA Payout)
- [13th Month Persistency Payout \(FY '13-14\)](#)

# Monthly Performance

**mynavigator** 

**ICICI PRUDENTIAL** 

CAPOS FIP Goals Team Planner ECS PROSPECTIVE Meetings Leads Renewal

**My Dashboard** Data is for current month

Welcome ,Mangala  
April 03, 2015

**Monthly Performance**  
(Logins and Issuances excludes goalsheet credits)

Target Plan Issuances % Achievement Logins

NO RECORDS FOUND!

Click to view all parameters in details

Top 2 FOS WFP → NO RECORDS FOUND!

Bottom 2 FOS WFP → NO RECORDS FOUND!

Deficit Actual

View Details

← Previous Month

**My Calendar**  
APRIL 2015

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5		
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30				

8 days Appointments Pending Issuances

Logins Issuances Pending Issuances

0 0

**Notifications**

**Risk Awareness**

- \* Spurious call 
- \* Some clients are not availing the services
- \* Some clients are not availing the services

**Media**

**Media**

**Click here to view FTM Team performance**

**Alerts**

- \* Plan Submission for 24 Team members is pending for the month [Click Here](#)
- \* Now FPD and renewal premium payment is easier by [Ecollect payment option](#).

**Opportunities**

**Incentives & BDA**

FY '14-15 Variable Incentive & Bonus Slab(BDA Payout) 

13th Month Persistency Payout (FY '13-14) 

**Goal Sheet Performance**

GTD WRP Target : 0

% Achievement : 0 %

**Monthly CDF Update**

Total Login(FTM) : 0

Pending CDF Count(FTM) : 0

CDF Submitted(FTM) : 0

[More Details](#)

**Toppers**

Branch : D.Vishwanathan

Zone : D.Vishwanathan

National : Abbas,Syed Mohd Ghezi

# Team Performance



## FTM Team Performance

Welcome Ray.Bharat  
October 05, 2012

Premium Payment Option e - Login Log out

2	All	Plan		Issuances		Login	
	Team members	WFP	CASES	WFP	CASES	WFP	CASES
0	Platinum	SANTOSH KUMARJH A 01123627	0	0	-12000	0	0
0	G.Premier	RAM MILANRAI 01090277	0	0	5092	1	5098
0	Gold						
0	Silver plus						
2	Silver						
0	Non GP						

Active FOS / Cafos  
will only reflect  
under FTM Team  
Performance

\*\* Magenta colour represents ARCL advisors

# View Detail

**mynavigator**  **WOW**

**ICICI PRUDENTIAL** LIFE INSURANCE

[FSP](#) [Goals](#) [Team](#) [Planner](#) [Meetings](#) [Leads](#) [Emails](#)

**My Dashboard**

**Monthly Performance**  
(Logins and Issuances excludes goalsheet credits)

	Target	Plan	Issuances	% Achievement	Logins
WRP	8,36,000	-	81,169	9.71	0
WFP	-	-	1,45,000	0.00	1,15,000
CASES	-	-	7	0.00	6
AVERAGE PREMIUM	-	-	20,714.29	0.00	19,166
OPENING FOS	-	-	20	0.00	-
OPENING DL	-	-	2	0.00	-
ACTIVE ADVISOR(s)	3	-	2	66.67	2

**WFP - Only first premium are considered.**  
**WRP - All Renewals/Modals are considered.**  
**Opening DL / BP - DL / BP which are mapped to the UM in beginning of the month.**  
**Opening FOS - Advisors which are mapped to the UM in beginning of the month.**

**View Details**

**Goal Sheet Performance**  
GTD WRP Target : 20903000  
% Achievement : 70%

**Contest**  
UM Contest  
Advisor Contest  
R&R

**Toppers**  
Branch : S.Srinivas  
Zone : S.Srinivas  
National : Chopra, Sanjeev

**Incentives & BDA**  
Incentive Update  
Last 6 months slip  
MIP FY12-13 Renewal Slip

**Notifications**  
**Distribution Leader (DL)**  
\* Probable DL (5)  
\* DL Goal Sheet (2)

**Alerts**  
\* Plan Submission for 28 Team members is pending for the month [Click Here](#)  
\* Now FPD and renewal premium payment is easier by [Ecolled](#) payment option.

**Opportunities**  
\* You have 6 lapsed cases in your portfolio [Click Here](#)  
\* You have 30 Upsell customer leads

Data as on **22-04-2013**

Site best viewed in IE7+, Firefox 14.0+, Chrome 3+, Safari 5.0+ at 1024 x 768 pixels resolution.

Only for internal circulation of ICICI Prudential

**WFP – Only First premium are considered.**

**WRP – All Renewals/Modals are considered**

**Opening DL/BP/FOS – Advisor/BP/DL which are mapped to the UM in beginning of the month.**

# My Calendar



## My Dashboard

Welcome ..Mangala  
April 03, 2015

neo+ Home Premium Payment Option Quick Links Log out

### Monthly Performance

(Logins and Issuances excludes goalsheet credits)

Target	Plan	Issuances	% Achievement	Logins
NO RECORDS FOUND!				

Calendar will  
Indicate FOS/ Cafos  
Birthday,  
Discrepancy  
and Appointments

← Previous Month

### My Calendar

APRIL 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Logins 0      Issuances 0      Pending Issuances 0

Track your current  
month business.

#### Ris

- \* Spurious awareness
- \* Social guide



#### Me

Summary  
\* 0 customer meeting(s) are due [Click here](#)

#### Alerts

- \* Plan Submission for 24 Team members is pending for the month [Click Here](#)
- \* Now FPD and renewal premium payment is easier by [Ecollect payment option](#).



Tracker will  
guide you to  
last 90 days  
Trackers

Login calendar  
will help you  
to track logins for  
rolling 30 days

Top 2 FOS      WFP →  
NO RECORDS FOUND!  
Bottom 2 FOS      WFP →  
NO RECORDS FOUND!

Team Performance

Login Calendar

Tracker

### monthly CDF Update

Total Login(FTM): 0  
Pending CDF Count(FTM): 0  
CDF Submitted(FTM): 0

[More Details](#)

### Toppers

Branch : D,Viswanathan  
Zone : D,Viswanathan  
National : Abbes,Syed Mohd Ghazi

### Incentives & BDA

FY '14-15 Variable Incentive & Bonus Slab(BDA Payout) [NEW](#)  
13th Month Persistency Payout (FY '13-14) [NEW](#)

Data as on 02-04-2015

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Only for internal circulation of ICICI Prudential



# My Daily Tracker – 90 days



## My Daily Tracker (last 90 days)

Welcome **Kumar, Amit**  
October 05, 2012

[Premium Payment Option](#) [e - Login](#) [Log out](#)

Logins <b>20</b> <a href="#">View Details</a>	Issuances <b>21</b> <a href="#">View Details</a>	Pending Issuances <b>0</b> <a href="#">View Details</a>	Medical Pending <b>0</b> <a href="#">View Details</a>	XRT <b>0</b> <a href="#">View Details</a>
Cheque Bounces <b>0</b> <a href="#">View Details</a>	Year 0 Lapsation <b>0</b> <a href="#">View Details</a>	Free Look & cancellations <b>0</b> <a href="#">View Details</a>	Discrepancies <b>0</b> <a href="#">View Details</a>	Application Tracker  <input checked="" type="radio"/> Application <input type="radio"/> isolutions  <a href="#">OK</a>

# Tracking iSolution cases



## My Daily Tracker (last 90 days)

Welcome Kumar.Amit  
October 05, 2012

Premium Payment Option e - Login Log out

Logins	Issuances	Pending Issuances	Medical Pending	XRT
20 <a href="#">View Details</a>	21 <a href="#">View Details</a>	0 <a href="#">View Details</a>	0 <a href="#">View Details</a>	0 <a href="#">View Details</a>
Cheque Bounces	Year 0 Lapsation	Free Look & cancellations	Discrepancies	Application Tracker
0 <a href="#">View Details</a>	0 <a href="#">View Details</a>	0 <a href="#">View Details</a>	0 <a href="#">View Details</a>	

Tracking iSolution cases

# Login Calendar



## Login Calendar

Welcome Kumar.Amit  
October 05, 2012

Premium Payment Option [e - Login](#) [Log out](#)

ADVISOR CODE ▲	ADVISOR NAME ▲	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00006881	SANDEEPKUMAR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00006904	DEENADAYALU R EDDYK.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00007849	S.ADARSHKUMAR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00008686	UMANARESHKUMAR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00010192	AGARWALBRAJA MOHAN	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00015446	PERUMALLA SWA MY K...	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00016245	SANGITA SHARA DLADDHA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00016591	JANKI PRASADG AUR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00017301	VEDANARAYANAK .A.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00018865	PECJAYASEELAN	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00020462	MUSA RAZAKAIS ER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00031285	INDIRA PRASAD M.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0

# Track DL opportunity



## My Dashboard

Welcome [Dashboard](#) [Logout](#)  
September 13, 2012

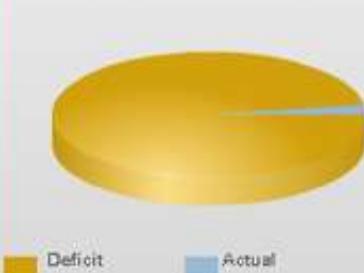
[Premium Payment Option](#) [e - Login](#) [Log out](#)

### Monthly Performance

[← Previous Month](#)

	Target	Plan	Issuances	% Achievement	Logins
WRP	14,65,000	-	37,995	2.59	0
WFP	-	-	32,475	0.00	59,972
CASES	-	-	1	0.00	1
AVERAGE PREMIUM	-	-	32,475	0.00	59,972
OPENING FOS	-	-	52	0.00	-

### % Achievement(WRP)



[View Details](#)

[Team Performance](#)

### My Calendar

SEPTEMBER 2012

Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

8 days Appointments Discrepancies

Logins

1

Issuances

1

Pending Issuances

0

[Login Calendar](#)

[Tracker](#)

### Notifications

#### Distribution Leader (DL)

- \* Probable DL (6)
- \* DL Probation (2)
- \* DL Goal Sheet (1)

#### Alerts

\* Plan Submission for 56 Team members is pending for the month

#### Opportunities

\* You have 0 unsell customer leads

**Track your DL's opportunity**

### Goal Sheet Performance

GTD WRP Target : 7319000

% Achievement : 34%

15

### Contest

UM Contest

Advisor Contest

### Toppers

Branch : C D,Abhinandan

Zone : C D,Abhinandan

National : Khadke,Mayuresh Shashikan

### Incentives & BDA

UM Incentive Jul 12

UM Incentive May 12

# Goal sheet



## My Dashboard

Welcome ,Mangala  
April 03,2015



Home

Premium Payment Option

Quick Links

Log out

**Monthly Performance**  
(Logins and Issuances excludes goalsheet credits)

Target	Plan	Issuances	% Achievement	Logins
NO RECORDS FOUND!				

**Click here to Login Goal Sheet details.**

**Click here to Know monthly CDF Details**

**My Calendar**  
APRIL 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5		
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Legend: ■ Appointments ■ Discrepancies

**Logins** 0    **Issuances** 0    **Pending Issuances** 0

**Goal Sheet Performance**  
GTD WRP Target : 0  
% Achievement : 0 %

**Monthly CDF Update**  
Total Login(FTM): 0  
Pending CDF Count(FTM): 0  
CDF Submitted(FTM): 0  
[More Details](#)

**Toppers**  
Branch : D.Vishwanathan  
Zone : D.Vishwanathan  
National : Abbas,Syed Mohd Ghazi

**Incentives & BDA**  
FY '14-15 Variable Incentive & Bonus Slab(BDA Payout) NEW  
13th Month Persistency Payout (FY '13-14) NEW

**Notifications**

**Risk Awareness**

- \* Spurious call awareness NEW
- \* Social Media guidelines NEW

**Meeting Summary**

- \* You 191 customer meeting(s) are overdue [Click here](#)

**Alerts**

- \* Plan Submission for 24 Team members is pending for the month [Click Here](#)
- \* Now FPD and renewal premium payment is easier by [Ecollect](#) payment option.

**Opportunities**

# Goal sheet



## More Detailed Tracker

Welcome Sonie,Aditi  
October 03,2012

Log out

TARGET											
Target Parameter	Pre Goal Sheet Period	M1	M2	M3	M4	M5	M6	M7	M8	M9	
	WRP	0	830000	852000	1013000	1065800	1120000	1200000	0	0	
ACHIEVEMENT											
Actuals	Pre Goal Sheet Period	M1	M2	M3	M4	M5	M6	M7	M8	M9	
	WRP	0	2605964	0	0	0	0	0	0	0	
PLAIN WRP											
Actuals	Pre Goal Sheet Period	M1	M2	M3	M4	M5	M6	M7	M8	M9	
	WRP	0	0	0	0	0	0	0	0	0	
PRODUCT CREDITS											
Actuals	Pre Goal Sheet Period	M1	M2	M3	M4	M5	M6	M7	M8	M9	
	WRP	0	0	0	0	0	0	0	0	0	
MONTHLY / ADDITIONAL CREDITS											
Actuals	Pre Goal Sheet Period	M1	M2	M3	M4	M5	M6	M7	M8	M9	
	WRP	0	0	0	0	0	0	0	0	0	

# CDF Update



## CDF Tracker for Last 90 Days

Welcome „Mangala“  
April 03, 2015



Home

### Premium Payment Option

## Quick Links

Log out

**Total 34 CDF pending since 1st April 13**

From

Page 1 of 1

To

Search

Tracker

Data as on 02-04-2015

Site best viewed in IE7+, Firefox 14.0+, Chrome 3+, Safari 5.0+ at 1024 x 768 pixels resolution.

Only for internal circulation of ICICI Prudential



# Incentive & BDA



## My Dashboard

Welcome „Mangala“  
April 03, 2015

[Home](#)[Premium Payment Option](#)[Quick Links](#)[Log out](#)

### Monthly Performance

(Logins and Issuances excludes goalsheet credits)

Target	Plan	Issuances	% Achievement	Logins
NO RECORDS FOUND!				

No data to display.

Deficit      Actual

[View Details](#)[← Previous Month](#)

### Top 2 FOS      WFP

NO RECORDS FOUND!

### Bottom 2 FOS      WFP

NO RECORDS FOUND!

[Team Performance](#)

### My Calendar

APRIL 2015

Mon Tue Wed Thu Fri Sat Sun

			1	2	3	4	5
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30				

■ B'days   ■ Appointments   ■ Discrepancies

Logins	Issuances	Pending Issuances
0	0	0

Click here for  
13 months  
persistency  
payouts .

[Tracker](#)

### Goal Sheet Performance

GTD WRP Target : 0

% Achievement : 0 %



### Monthly CDF Update

Total Login(FTM) : 0

Pending CDF Count(FTM) : 0

CDF Submitted(FTM) : 0

[More Details](#)

Zone : D.Viwanathan

National : Abbas.Syed Mohd Ghazi

### Notifications

#### Risk Awareness

- \* Spurious call awareness
- \* Social Media guidelines



#### Meeting Summary

- \* Your 191 customer meeting(s) are overdue [Click here](#)

#### Alerts

- \* Plan me more
- \* No pay pay

**Click here for payout summary**



#### Opportunities

- \$ Incentives & BDA
- FY '14-15 Variable Incentive & Bonus Slab(BDA Payout) **NEW**
- 13th Month Persistency Payout (FY '13-14) **NEW**



# Payout Summary

Welcome „Mangala  
April 03,2015


[Home](#)
[Premium Payment Option](#)
[Quick Links](#)
[Log out](#)

## Variable Incentive Payout Summary

Month	Lead uploaded till 20th*	WRP	Payment WRP**	Incentive Amount Basis WFP slab	Incentive amount after penalty	ECS Status ***	Payout-I Payable @ 50%	Not to pay	Net amount payable	Download PPT
<a href="#">SEP-14</a>	5	125000	137000	0	0	<75%	0	0	0	<a href="#">Click Here</a>
<a href="#">OCT-14</a>	8	1672000	2183000	22000	16500	>=75%	8250	0	8250	<a href="#">Click Here</a>
<a href="#">NOV-14</a>	40	1150000	1462000	10000	10000	>=75%	5000	0	5000	<a href="#">Click Here</a>

Month	30% Protection Penalty Y/N *	WRP	Payment WRP**	Protection WFP	Incentive Amount Basis WFP slab	Payout-I Payable @ 50%	Protection Penalty	Incentive amount after penalty	ECS Status ***	Not to pay	Net amount payable	Download PPT
<a href="#">DEC-14</a>	N	551000	826500	0	0	0	0	0	>=75%	0	0	-
<a href="#">JAN-15</a>	N	502000	753000	0	0	0	0	0	>=75%	0	0	-

## Bonus Slab (BDA) Payout Summary

Month	Cafos count	Early inductor Amount	WRP for Hatrick bonus	Hatrick bonus	WRP for Half million	Half Million	Total BDA	Download PPT
<a href="#">SEP-14</a>	0	0	24000	0	125000	0	0	-
<a href="#">OCT-14</a>	2	1500	970000	1000	1571000	1000	3500	-
<a href="#">NOV-14</a>	8	1500	980000	1000	1150000	1000	3500	-
<a href="#">DEC-14</a>	2	0	351000	1000	551000	1000	2000	-
<a href="#">JAN-15</a>	1	0	452000	1000	502000	1000	2000	-

\* 30% Penalty on Payout Cycle 1 for not Meeting Minimum Protection WFP (Net of Taxes).Minimum protection WFP Gate criteria of 30,000 for (FSC AFSM & SFMS) and 45000 for AKRM and above (Net of Taxes) should be met to avoid Penalty on 1st cycle payout

\*\* Payment WRP includes the branch credit

\*\*\* ECS/SI Tagging should be >=75% for Payout - I

13th Month Persistency  
Payout(FY'13-14)Welcome ..Mangala  
April 03,2015

Home

Premium Payment Option

Quick Links

Log out

Month	Total Incentive Eligible Amount	50% Amount already Paid in Payout-I	Amount payable after 1st Renewal*	To be collected Month/Year	Payout Month	Renewal collected %	Payout Grid %	Payable Amount
September	24000.0	0	24000.0	Nov 14	Dec 14	66%	0%	0.00
October	15000.0	7500.0	7500.0	Dec 14	Jan 15	62%	0%	0.00
November	20000.0	10000.0	10000.0	Jan'15	Feb'15	68.94%	0%	0.00
December	30000.0	15000.0	15000.0	Feb'15	Mar'15	88.75%	100%	15000.00
January	25000.0	12500.0	12500.0	March 15	April 15	0	0	0
<b>Total</b>	<b>114000.0</b>	<b>45000.0</b>	<b>69000.0</b>					

\* All the IF/PD/LA cases where renewals are collected will only get considered  
 Renewal Collected Payout Grid and Payable amount will get updated post Payout month

# FSP Login



## FSP Login

Welcome [REDACTED]  
September 07,2012

Log out

### Enter Details

FSP Under Self :  YES  NO  DL

DL Agent :

Enter UM/BP Code : 00030089

Channel :

UM/BP's Branch Code : 056

[+ New Application](#)

[View Application Status](#)

Click here to view  
application Status  
submitted by you

Data as on 06-09-2012

Site best viewed in IE7+, Firefox 14.0+, Chrome 3+, Safari 5.0+ at 1024 x 768 pixels resolution.

Only for internal circulation of ICICI Prudential

Click on Radio button (FSP) to go to AMS Link .

Dummy codes are already inbuilt for FOS / DL.

# Team Details



## Team Details

Welcome Ray,Bharat  
October 05,2012

Premium Payment Option e-Login

Click here  
for team  
detail

All	26	Team members
Platinum	0	Team members
G.Premier	0	Team members
Gold	0	Team members
Silver plus	4	Team members
Silver	5	Team members
Non GP	17	Team members

DATE OF BIRTH	DATE OF APPOINTMENT	DATE OF LICENSE EXPIRY	EMAIL ADDRESS	PAN NUMBER	SOURCE OPTIONS
26-01-1993	19-07-2012	18-07-2015	AdarshSR@gmail.com	COJPK8579Q	Self Sourced
04-12-1977	16-09-2011	15-09-2014	aishwaryaaAA@gmail.com	BBMPR7666D	Self Sourced
05-02-1972	12-11-2010	11-11-2013	amarnath1120087@iciciprpartner.com	CYXPS7150J	Self Sourced
05-02-1972	11-08-2011	11-11-2013	amarnath1120087@iciciprpartner.com	CYXPS7150J	-
06-06-1963	18-06-2010	17-06-2013	-	BHVPP1907J	Self Sourced
03-03-1980	21-06-2011	20-06-2014	dharmaD@gmail.com	ALVPC9973E	Self Sourced
01-01-1989	29-09-2011	28-09-2014	dhirendraNR@gmail.com	CDBPK0402N	Self Sourced
19-06-1972	12-10-2011	11-10-2014	gopalSLR@gmail.com	AJOPR4102M	Self Sourced

ARCIL advisor  
are Colour coded

\*\* Magenta colour represents ARCIL advisors

# Planner



Click here  
for planner

## Monthly Planner

Welcome **Team Lead**  
September 07, 2012

Log

28 All

Team members

0 Platinum

Team members

1 G.Premier

Team members

2 Gold

Team members

1 Silver plus

Team members

3 Silver

Team members

21 Non GP

Team members

### Last 3 months Issuances

WFP

CASES

1800000

12

600000

12

120000

6

30000

6

0

0

6018

0

### Planned

WFP

CASES

\*\* Magenta colour represents ARDI Advisors

Only for internal circulation of ICICI Prudential

Plan your Business for the Month. It will be Auto  
approved.

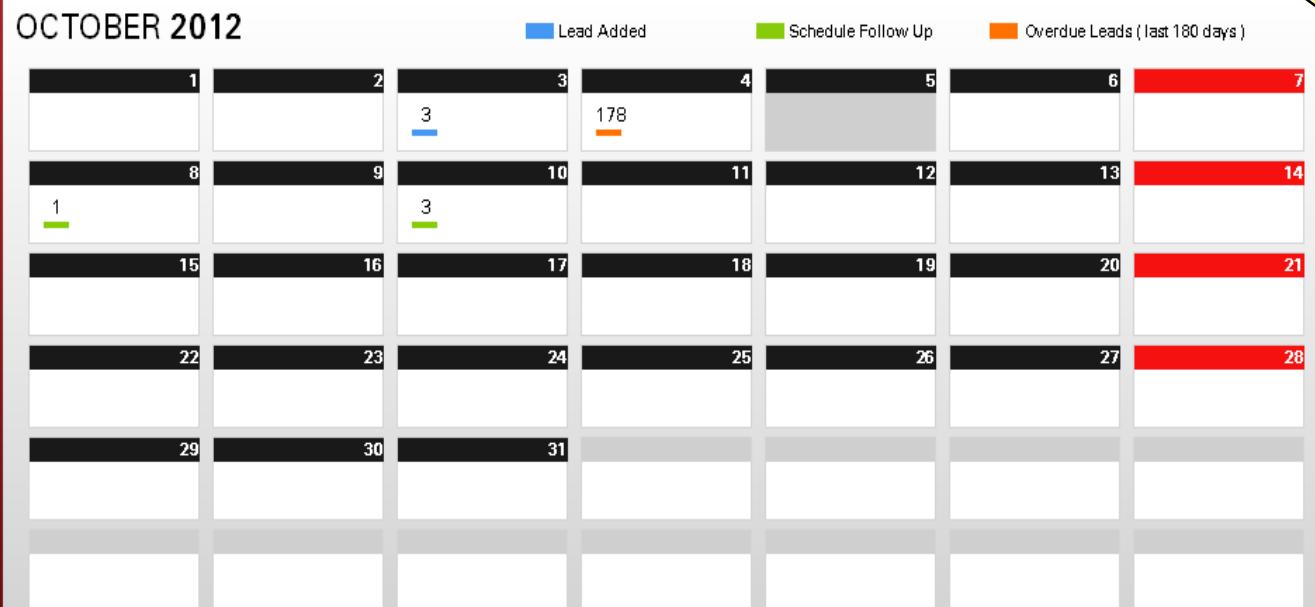
# Customer Meeting



## Customer Meeting

Welcome Chaudhary,Peeyush A.  
October 05,2012

Premium Payment Option e-Log Log out



Click here to login to planner



Click here for Lead detail / update

Click here to add a lead

# Add a Lead- Customer Meeting



## Customer Meeting

Welcome [User Name]

July 16, 2012

Log out

JULY 2012

Customer Name :

1st Appointment

Mobile No :

Schedule Follow Up

Overdue Leads

2

3

1

9

6

H

16

7

8

23

12

H

30

13

15

Expected BWRP :

14

H

Next Meeting Date :

19

H

20

22

21

H

26

H

27

29

28

Submit

FTM

■ 0 ■ 0 ■ 0

Hot Prospect

FTM : 0  
Last Month : 0

Follow up

FTM : 0  
Last Month : 0

Add New Customer Meeting

# Update Meeting Details



## Meeting Details

Welcome **Sonia, Aditi**  
October 03, 2012

[Log out](#)

All Meetings		From			To			Search	Next Date
OverDue Leads		Date Added	S.No.	Customer Id	Name	Mobile Number	Lead Source	Follow up Date	
Follow Up		01/10/2012	1	1368914	barun	9862698981	CAFOS lead	01/10/2012	
Lead Status		01/10/2012	2	1368915	radhika	9325787898	CAFOS lead	01/10/2012	
Lead Source		01/10/2012	3	1368916	azare	9325897879	CAFOS lead	01/10/2012	
Customer ID		24/09/2012	4	1358311	sudhir suri	9820748479	CAFOS lead	24/09/2012	
		24/09/2012	5	1358328	nikhil suri	9874894789	CAFOS lead	18/10/2012	
		17/09/2012	6	1340421	rajaram	9325698748	CAFOS lead	17/09/2012	
		17/09/2012	7	1340422	pankaj shah	9867848587	CAFOS lead	17/09/2012	

Track your Leads &  
update the status of  
Leads

\*\* Values displayed in this screen are for the last 180 days

[Back](#)

# Upsell Leads



## Upsell Leads

Welcome M. E. Nizamath  
September 07, 2012

[Log out](#)

ADVISOR NAME	ADVISOR CODE	GP CATEGORY	ADVISOR CONTACT NUMBER	HIGH PROPENSITY CUSTOMERS	TOTAL NUMBER OF ACTIVE CLIENTS	NUMBER OF PROMOTED PRODUCT LOGINS
Abdul BasithKhan	00051849	GOLD	9895233414	2	46	0
MARYKUTTYFRANCIS	00273065	NA	8089769637	1	13	0
SAVAD M.K.	00073292	NA	9846694603	1	12	0
SEBASTIANP.V	01139129	NA	08095394346	2	3	0

# Reach us

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Access Related/Data related call can be logged under following Function & Domain.

Path : Helpline – My Navigator – Access Related/ Data related.

Incentive & BDA related queries can be logged under :

Path : Helpline – UM variable payout – UM Bonus Payout & UM BDA Payout.

PMS related queries:

Log a call in Intranet>Applications>I-Assist>Stepping stones.



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# Thank You