



## 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

← Previous Month

(Logins and Issuances excludes goalsheet credits)

Target	Plan	Issuances	% Achievement	Logins
NO RECORDS FOUND!				

No data to display.

Top 2 FOS WFP →

NO RECORDS FOUND!

Bottom 2 FOS WFP →

NO RECORDS FOUND!

Deficit Actual

View Details

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

0

Issuances

0

Pending Issuances

0

Login Calendar

Tracker

## Notifications

### Risk Awareness

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

NEW

NEW

### 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



### 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,Viswanathan

Zone : D,Viswanathan

National : Abbas,Syed Mohd Ghazi



### Incentives & BDA

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

NEW

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

NEW



# Monthly Performance



My Dashboard

Data is for current month

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 to view all parameters in details

← Previous Month

Top 2 FOS WFP →

NO RECORDS FOUND!

Bottom 2 FOS WFP →

NO RECORDS FOUND!

Deficit Actual

View Details

Team Performance

## My Calendar

APRIL 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
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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

Logins

Issuances

Pending Issuances

0

0

0

Login Calendar

Tracker

## Notifications

### Risk Awareness

\* Spurious call

\* Spurious call

\* Spurious call

\* Spurious call

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### 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.](#)

\* Now FPD and renewal premium payment is easier by [Ecollect](#)

[payment option.](#)

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[payment option.](#)

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[payment option.](#)

\* 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)

NEW

NEW

NEW

NEW

NEW

NEW

NEW

NEW

NEW

NEW

NEW

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

All important information at a glance



# Team Performance



## FTM Team Performance

Welcome **Ray.Bharat**  
October 05,2012

Premium Payment Option

e - Login

Log out

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

Active FOS / Cafos  
will only reflect  
under FTM Team  
Performance

\*\* Magenta colour represents ARCIL advisors



# View Detail

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

WRP - 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.

Deficit

Actual

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 FY'12-13 Renewal Slip

Premium Payment Option

Quick Links

Log out

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 [Ecollect 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

[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

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

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

### 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

Track your current month business.

### 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

### 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 : Abbas,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

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





# My Daily Tracker – 90 days



## My Daily Tracker (last 90 days)

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

[Premium Payment Option](#)

[e - Login](#)

[Log out](#)

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

Last 90 days data will reflect under my daily tracker



# Tracking iSolution cases



**My Daily Tracker** (last 90 days)

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

Premium Payment Option

e - Login

Log out

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

Tracking I solution cases



# Login Calendar



## Login Calendar

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

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

No Login

Logins

Sunday

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
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
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
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
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
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
00015446	PERUMALLA SWAMY 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
00016245	SANGITA SHARADLADDHA	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 PRASADGAUR	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
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
00020462	MUSA RAZAKAISER	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

Data as on **04-10-2012**

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

**Rolling 30 days login details will reflect , Green Color indicate logins**



# Track DL opportunity



## My Dashboard

Welcome **Chandrasekhar, Girish Kumar**  
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)



Deficit Actual

#### Top 2 FOS

Bindu 29,975

PRASHANT 2,500

#### Bottom 2 FOS

PRASHANT 2,500

Bindu 29,975

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

B'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 1 sell customer leads

Track your DL's opportunity



### Goal Sheet Performance

GTD WRP Target : 7319000

% Achievement : 34%



### 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  
Appointments Discrepancies

Logins

0

Issuances

0

Pending Issuances

0

Login Calendar

Tracker

### Notifications

#### Risk Awareness

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

#### 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

### 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.Viswanathan

Zone : D.Viswanathan

National : Abbas,Syed Mohd Ghazi

### Incentives & BDA

FY '14-15 Variable Incentive & Bouns 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





# 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	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	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	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	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	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

To

Search

CUSTOMER NAME	LOGIN DATE	POLICY NUMBER	ECS/SI TAGGING	ECS/SI REGISTRATION	POLICY STATUS	CDF STATUS
.SHANKARJAMBUKESWARAN	12-02-2015	19149145	YES	REGISTERED	IF	No
IHARATHARAVAMUTHAN	06-02-2015	19136188	YES	REGISTERED	IF	No
A SEKARANDHARMALINGAM	04-02-2015	19132228	-	REGISTERED	IF	No
IYASHREEMANOCHARAN	12-01-2015	19088492	YES	REGISTERED	IF	No

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.

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# Incentive & BDA



## My Dashboard

Welcome **Mangala**  
April 03, 2015



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Log out

### Monthly Performance

← Previous Month

(Logins and Issuances excludes goalsheet credits)

Target	Plan	Issuances	% Achievement	Logins
NO RECORDS FOUND!				

No data to display.

Top 2 FOS WFP →

NO RECORDS FOUND!

Bottom 2 FOS WFP →

NO RECORDS FOUND!

Deficit Actual

View Details

Team Performance

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.Viswanathan

National : Abbas,Syed Mohd Ghazi

### 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  
0

Issuances  
0

Pending  
Issuances  
0

### Notifications

#### Risk Awareness

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

#### Meeting Summary

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

#### Alerts

- \* Plan me mo
- \* No pay pa

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**

Click here for 13 months persistency payouts .



# 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 & SFSM) 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
<u>September</u>	24000.0	0	24000.0	Nov 14	Dec 14	66%	0%	0.00
<u>October</u>	15000.0	7500.0	7500.0	Dec 14	Jan 15	62%	0%	0.00
<u>November</u>	20000.0	10000.0	10000.0	Jan'15	Feb'15	68.94%	0%	0.00
<u>December</u>	30000.0	15000.0	15000.0	Feb'15	Mar'15	88.75%	100%	15000.00
<u>January</u>	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

## FSP Login

Welcome **Mr. S. S. Srinivas**  
September 07, 2012

[Log out](#)

Enter Details

FSP Under Self : ☒ YES ☐ NO ☐ DL

DL Agent :

Enter UM/BP Code :

Channel :

UM/BP's Branch Code :

[+ 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

26 All Team members			DATE OF BIRTH	DATE OF APPOINTMENT	DATE OF LICENSE EXPIRY	EMAIL ADDRESS	PAN NUMBER	SOURCE OPTIONS
0 Platinum Team members	ADARSHKUMAR		26-01-1993	19-07-2012	18-07-2015	AdarshSR@gmail.com	COJPK8578Q	Self Sourced
0 G.Premier Team members	01179501 8083484322							
0 Gold Team members	AISHWARYARANI		04-12-1977	16-09-2011	15-09-2014	aishwaryaAA@gmail.com	BBMPR7666D	Self Sourced
0 Silver plus Team members	01153274 8092420048							
4 Silver Team members	AMAR NATHSINGH		05-02-1972	12-11-2010	11-11-2013	amarnath1120087@icicipartner.com	CYXPS7150J	Self Sourced
5 Non GP Team members	01120087 9430036220							
	AMAR NATHSINGH		05-02-1972	11-08-2011	11-11-2013	amarnath1120087@icicipartner.com	CYXPS7150J	-
	01147778 (DU) 9430036220							
	CHANDESHWARPRASAD		06-06-1963	18-06-2010	17-06-2013	-	BHVPP1907J	Self Sourced
	01092798 9801453956							
	DHARMENDRACHOUHARY		03-03-1980	21-06-2011	20-06-2014	dharmendraDH@gmail.com	ALVPC9973E	Self Sourced
	01139164 9006095754							
	DHIRENDRAKUMAR		01-01-1989	29-09-2011	28-09-2014	dhirendraNR@gmail.com	CDBPK0402N	Self Sourced
	01155574 9939288090							
	GOPALRAI		19-06-1972	12-10-2011	11-10-2014	gopalSLR@gmail.com	AJOPR4102M	Self Sourced
	01156747 9850159954							

ARCIL advisor  
are Colour coded

\*\* Magenta colour represents ARCIL advisors



# Planner



Click here for planner

## Monthly Planner

Welcome **Abdul Nural**  
September 07, 2012

Log

28 All Team members		Last 3 months Issuances		Planned	
		WFP	CASES	WFP	CASES
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				
	ABDUL BASITH	1800000	12		
	00051849				
	SEBASTIAN	600000	12		
	01139129				
	MARYKUTTY	120000	6		
	00273065				
	SAVAD M.	30000	6		
	00073292				
	MARISAMMA	0	0		
	00074815				
	JITENDRAN K.P	-6018			
	00042182				
	BABU P.				
	00036225				
	VYSAKH				

\*\* Magenta colour represents ARDIL advisors

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

5.0+ at 1024 x 768 pixels resolution.

Only for internal circulation of ICICI Prudential



# Customer Meeting



## Customer Meeting

Welcome **Chaudhary,Peeyush A.**  
October 05,2012

Premium Payment Option

e - Doc

Log out

OCTOBER 2012

Lead Added

Schedule Follow Up

Overdue Leads ( last 180 days )

1	2	3 3	4 178	5	6	7
8 1	9	10 3	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Click here  
to login  
to planner

Meeting Details

260

Meetings

Add a lead

FTM

3 4 178

To Know More Click On Meeting Details

Hot Prospect

FTM :0

Last Month :0

To Know More Click On Meeting Details

Follow up

FTM :

Last M

To Know More Click On Meeting Details

FTM lead  
detail

Click here  
for Lead  
detail / update

Click here to  
add a lead



# Add a Lead- Customer Meeting



## Customer Meeting

Welcome: **Prudential**  
July 16, 2012

Log out

JULY 2012

1st Appointment

Schedule Follow Up

Overdue Leads

Customer Name :

Mobile No :

Lead Source :

--select--

CAFOS Code :

Expected BWRP :

Next Meeting Date :

Submit

Add New Customer Meeting

FTM

0 0 0

Hot Prospect

FTM :0  
Last Month :0

Follow up

FTM :0  
Last Month :0



# Update Meeting Details



## Meeting Details

Welcome **Sonie,Aditi**  
October 03,2012

[Log out](#)

### All Meetings

From

To

[Search](#)

### OverDue Leads

### Follow Up

### Lead Status

### Lead Source

### Customer ID

Date Added	S.No.	Customer Id	Name ▲	Mobile Number	Lead Source	Follow up Date ▲	Next Date
01/10/2012	1	1368914	barun	9862698981	CAFOS lead	01/10/2012	
01/10/2012	2	1368915	radhika	9325787898	CAFOS lead	01/10/2012	
01/10/2012	3	1368916	azare	9325897879	CAFOS lead	01/10/2012	
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	

[Back](#)

Track your Leads &  
update the status of  
Leads

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



# Upsell Leads



Upsell Leads

## Upsell Leads

Welcome **M E Nishaanth**  
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