

salesforce

Financial Services Cloud User Guide

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 @salesforcedocs

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DELIVER FINANCIAL SERVICES FOR HIGH-TOUCH CLIENT RELATIONSHIPS

Financial Services Cloud is a reimagined front office. Get a clean, aggregated view of the most relevant, actionable client information without logging in to a dozen systems throughout the day. Accelerate your productivity with technology and digital workflows that reduce the time you spend on routine, administrative tasks. Focus instead on delivering the highly personalized, proactive service that your clients expect.

Start with the basics of managing your client book for deeper engagement and more profitable client relationships.

 **Note:** For usage restrictions that apply to this product, see [this document](#).

Before installing the Financial Services package, enable **Allow users to relate a contact to multiple accounts**.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Key Terms

Certain terms can have multiple meanings within a financial services context. It's important to clarify what we mean when you encounter terms such as *account* or *client* in our app.

[Use the Home Page to Take Charge of Your Day](#)

The home page is tailored to your needs and gives you instant access to the most pressing items on your to-do list. What are your priorities today? What's next? What's pending?

[Filter Client and Household Lists](#)

View filtered lists of people and households based on similar interests or financial characteristics to quickly navigate to their profiles.

[View Client and Household Profiles](#)

A profile provides a full picture of a client's or household's financial past, present, and future. In a single view, you can monitor financial accounts, visualize personal and household relationships, manage goals, and review activity history.

[Monitor Your Book of Business with Dashboards](#)

Dashboards help you see at a glance your engagement with clients and the potential to bring in more business.

[Get the Data You Need with Reports](#)

Reports provide you with detailed information on clients and opportunities to bring in more business.

[What Client Data Can I See?](#)

The Salesforce security and sharing model ensures flexibility and the appropriate levels of access to client data. Ask your Salesforce admin for details about how data visibility is defined for your teams.

SEE ALSO:

[Financial Services Cloud Admin Guide](#)

Key Terms

Certain terms can have multiple meanings within a financial services context. It's important to clarify what we mean when you encounter terms such as *account* or *client* in our app.

Account

Account can refer to a client, household, or business. Not to be confused with a *financial account*.

Client

A person or organization that does business with your firm in the past, present, or future. See also *person*.

Customer

Used interchangeably with *client*. See also *person*.

Financial account

An investment account, bank account, insurance policy, or other type of financial account. In some financial services applications, financial accounts are the central unit of organization. Other applications, including Financial Services Cloud, treat clients or family groups as the central unit.

Household

A type of relationship group that includes people and business entities who have direct relationships with one another. Within this group, financials are summarized at the household level. Salesforce doesn't track directly how members within a household are related. Roles within a household, such as client, spouse, or dependent, define relationships.

People associated with the household but outside of it are *related contacts*, such as lawyers, accountants, or tax planners. Organizational entities that are associated with a household but don't roll up any financials to the household are *related accounts*. These related accounts include businesses or households.

In client and household profiles, household (relationship group) members appear together. These members are clearly separated from other associated entities or extended relationships.

Individual

See *person*.

Person

A client, customer, prospect, or contact whose details are maintained by your firm. Financial Services Cloud stores data about people using either an individual or person account model.

Prospect

A person or organization with the potential to become a *client*.

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Use the Home Page to Take Charge of Your Day

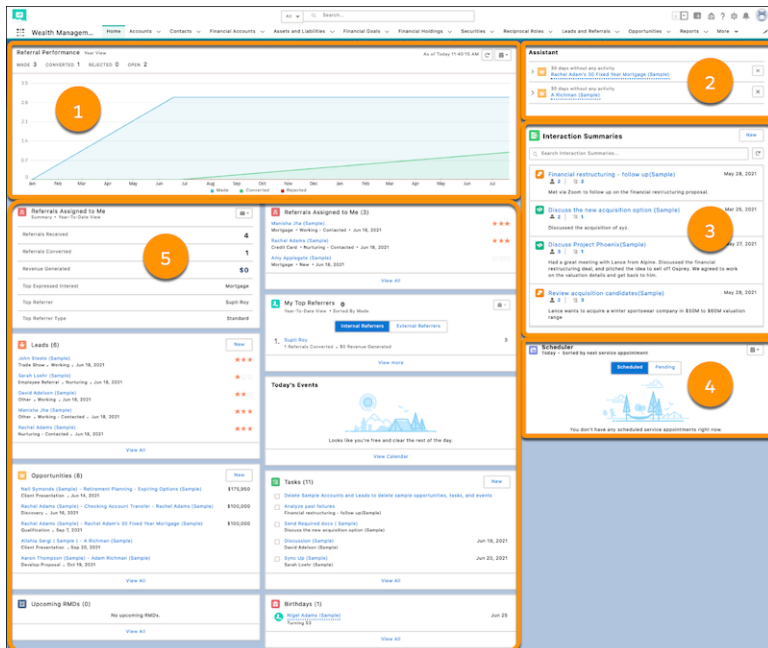
The home page is tailored to your needs and gives you instant access to the most pressing items on your to-do list. What are your priorities today? What's next? What's pending?

Your home page can differ depending on how your organization implements Financial Services Cloud and on any customizations made by your admin.

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- Referral Performance (1) shows how opportunities look for the quarter.
- Assistant (2) offers alerts about leads assigned to you for the day and opportunities requiring attention.
- Interaction Summaries (3) shows a list of interaction summaries for all accounts (if enabled). Interaction Summaries captures structured notes of client or partner interactions and lets you share them with stakeholders in a compliant manner.
- Scheduler (4) shows scheduled and pending service appointments from Salesforce Scheduler (if enabled). Salesforce Scheduler simplifies and optimizes appointment scheduling.
- Key tasks and actions (5) shows important information, including:
 - Summary of Referrals Assigned to Me: Provides an overview of converted and rejected referrals and top areas of interest.
 - Referrals Assigned to Me: Shows you the top referral for action.
 - My Top Referrers: Shows who has been providing you with the best referrals.
 - Opportunities and Leads: Helps you track ways to deepen and grow your book of business.
 - Today's Events: Shows the next five items on your calendar for the day. Past events drop off as the day progresses.
 - Tasks: Lists upcoming tasks. Lets you mark tasks as complete. If you remain on the page, you can reopen completed tasks. Refreshing the page removes completed tasks from the view.
 - Birthdays: Lists the clients celebrating birthdays in the next seven days.

SEE ALSO:

- [Events and Calendars](#)
- [Track Client Interactions](#)


Filter Client and Household Lists

View filtered lists of people and households based on similar interests or financial characteristics to quickly navigate to their profiles.

 **Tip:** The My Clients and My Groups list views are a good starting point because they show all clients and households in your book of business. These list views are on the Accounts tab.

- See which list views your Salesforce admin has made available by selecting the list view name at the top of the page.
- To sort, click a column header.
- Change the filter criteria to dynamically update your view of My Clients or My Groups, segmenting clients by marketing segments, age, or birthdays.

1. To expand the list of criteria you can filter by, click the **Filters** icon.
2. For each filter that you want to change, select the filter, edit the criteria, and then click **Done**.

 **Important:** If you're filtering by a currency value, specify a currency ISO code, such as USD or GBP, before the value. For example, *GBP100000*. The ISO code must be one of your firm's active currencies.

3. Click **Apply**.
The list view refreshes with your updated filter criteria.

For now, you can't save your changes to a list view that you've edited.

- View up to 25 records per page and a maximum of approximately 2,000 items per list view.
If you can't access some items because the list view contains more items than the maximum, narrow your filter criteria.

SEE ALSO:

[Find and View Your Data](#)

View Client and Household Profiles

A profile provides a full picture of a client's or household's financial past, present, and future. In a single view, you can monitor financial accounts, visualize personal and household relationships, manage goals, and review activity history.

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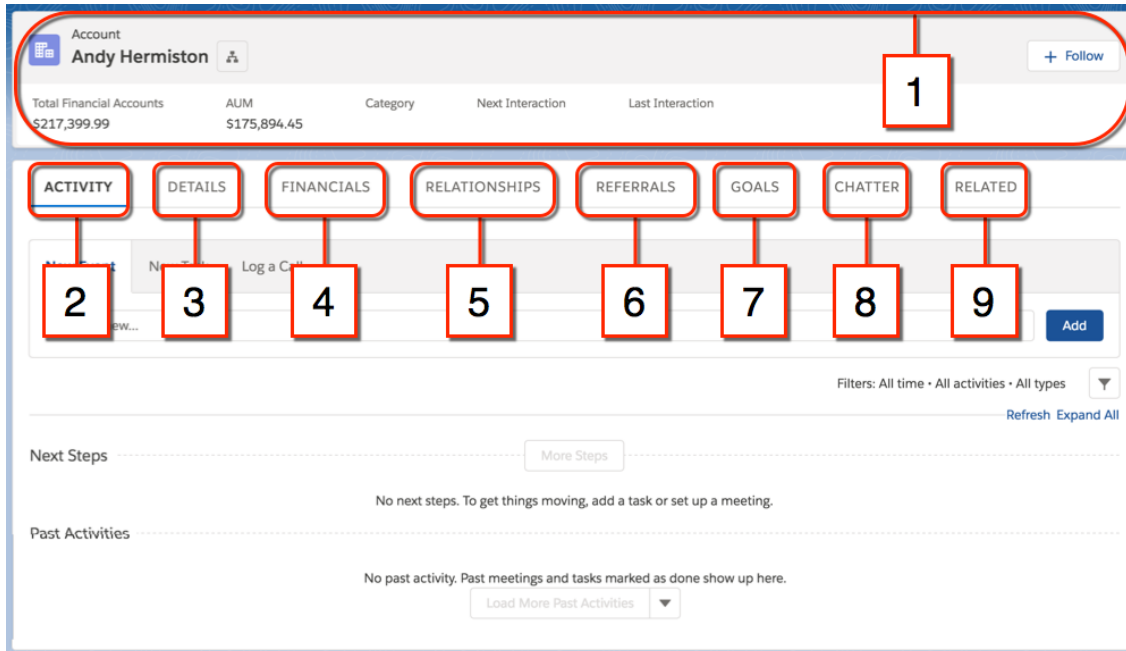
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Your tabs and field names and their order can differ from what you see here based on how your Salesforce admin has customized them. However, the layout of sections within a profile page can't be changed.

Highlights panel (1)

See the last and next scheduled interaction at a glance.

Activity (2)

View timelines of next steps and past activities, create tasks and events, and log client communications.

Details (3)

Quickly access details without leaving the profile page. Tabs on the profile pages offer similar views, with slight differences between the client and household profiles. For clients, view summaries of Know Your Client information, employment, and contact information. For households, view high-level summaries of total financial assets. To edit Details information, use the Edit button in the highlights panel.

Financials or Financial Accounts (4)

Track financial accounts by the predefined categories of investment accounts, bank accounts, and insurance policies. Also track assets and liabilities.

Relationships (5)

Manage the network of relationships in a household. Add new household members. Add people from outside of the household as related contacts. For households, you can add other households or business entities as related accounts. You can edit or delete associated contacts and accounts.

Referrals (6)

Get a summary of referral performance along with details of referrals and expressed interest.

Goals (7)

Track what matters to your clients for goal-based planning.

Chatter (8)

Use the Chatter feed to share information and collaborate with other team members who manage client relationships.

Related (9)

See comprehensive summaries of financial accounts, tangible assets, liabilities, and related lists, such as opportunities, cases, notes, and attachments. This view can be handy for onboarding when you want to quickly enter a series of financial accounts, goals, opportunities, and relationships.

SEE ALSO:

[View Client and Household Profiles](#)[Activity Timeline](#)[Share Updates with People in Chatter](#)

Monitor Your Book of Business with Dashboards

Dashboards help you see at a glance your engagement with clients and the potential to bring in more business.

1. On the navigation menu, click the **Dashboards** list view.
2. Click **All Folders**.
 - Public Dashboards contains:
 - My Book of Business - Overview—Manage your existing book of business with insights about AUM, wallet share, held-away assets, and financial account totals by client.
 - My Book of Business - Engagement Opportunities—Deepen client relationships by tracking upcoming client reviews, birthdays, and other relationship touchpoints.
 - My Book of Business - Sales & Opportunities—Grow your book of business by identifying new AUM opportunities and focusing your sales process on hitting targets.
 - Referrals Dashboards contains:
 - My Top Referrers—Discover the internal and external referrers who are bringing you the most new business.
 - Referral Performance by User—Track the performance of referrals you made and the referrals assigned to you.
3. Select a dashboard.

To get the latest data, click **Refresh**.

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SEE ALSO:

[Reports and Dashboards](#)

Get the Data You Need with Reports

Reports provide you with detailed information on clients and opportunities to bring in more business.

1. In the navigation menu, go to the Reports list view.
2. Click **All Folders**, and choose **Advisor Reports**, **My Top Referrers**, or **Referral Performance**.
3. Select a report.
To get the latest data, click **Refresh**.

SEE ALSO:

[Reports and Dashboards](#)

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What Client Data Can I See?

The Salesforce security and sharing model ensures flexibility and the appropriate levels of access to client data. Ask your Salesforce admin for details about how data visibility is defined for your teams.

SET UP CLIENTS, HOUSEHOLDS, AND RELATIONSHIPS

Create records for clients, households, and their extended network of relationships so that you maintain a rich, holistic view of your book of business.

[Create a Client or Prospect](#)

Financial Services Cloud gives you two ways to create clients or prospects.

[Add Education Details](#)

You can store details about a client's education history.

[Add Employment Details](#)

You can store details about a client's employment history.

[Add Identification Documents](#)

You can store details about documents used to identify a client.

[Create a Household from the Account Tab](#)

Use households to track groups of clients, businesses, and trusts who have a direct relationship with one another and shared financials. A household is a type of relationship group. Your Salesforce admin can create other relationship group types to fit your business requirements.

[Create a Household from a Client Profile](#)

Capture the full richness of a client's relationships by adding multiple households. If you can't add a client to more than one household, ask your Salesforce admin to enable the multiple relationship groups custom setting. A household is a type of relationship group. Your Salesforce admin can create other relationship group types to fit your business requirements.

[Add Household Members and Relationships](#)

Add members to a household, and relate businesses, trusts, and other people to the household members. Define how to summarize the members' activity and financials at the household level.

[Add an Extended Relationship to a Client or Household](#)

Better visualize clients' relationships with people outside of their household. Track the other professionals who advise clients about their financial lives. Also track clients' affiliations with owned businesses and other organizational entities.

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Create a Client or Prospect

Financial Services Cloud gives you two ways to create clients or prospects.

Your Salesforce admin can set up record types to fit your business needs. Work with the added record types as you would with standard client or prospect records.

[Create a Client or Prospect from the Accounts Tab](#)

When you want to track engagement with a new client or prospect, create a profile.

[Create a Client or Prospect with the Individual Builder](#)

When your implementation uses the person model, use the Create Individual builder to add clients or prospects, and optionally add them to a relationship group.

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Create a Client or Prospect from the Accounts Tab

When you want to track engagement with a new client or prospect, create a profile.

1. On the Accounts tab, click **New**.
2. Select **Individual** or **Person account**.
3. For the account name, enter the client's name.
4. Select a status.
 - For a client, select **Active**.
 - For a prospect, select **Prospect**.
 - For a client that you're onboarding, select **Onboarding**.
5. Enter other relevant information and save the information.

 **Note:** You can't delete clients and prospects.

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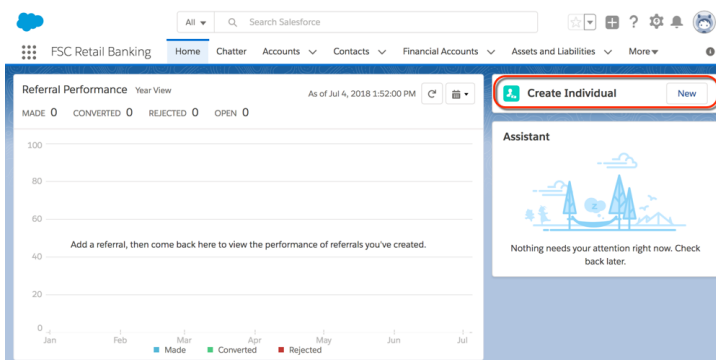
Create a Client or Prospect with the Individual Builder

When your implementation uses the person model, use the Create Individual builder to add clients or prospects, and optionally add them to a relationship group.

In the Create Individual builder, complete this information about the client or prospect.

- Account details
- Contact details
- Relationship group details (optional)

1. Click **Home**.
2. In the Create Individual section, click **New**.




3. For the account name, enter the client or prospect's name.
4. Select a status.
 - For a client, select **Active**.
 - For a prospect, select **Prospect**.
 - For a client that you're onboarding, select **Onboarding**.
5. (Optional) Enter the remaining client or prospect details, and then click **Save & Next**.
6. (Optional) Enter the client or prospect's contact details, and then click one of the following.

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- To finish creating the client or prospect, click **Save**.
 - To add the client or prospect to a relationship group, click **Save & Next**.
7. To designate this client or prospect as the primary household member, select **Primary Member**. Designating a primary member is not required, but a household can have only one primary member.
 8. Select the member role that the client or prospect fills within the household.
 - If the role is primary household member, select **Client**. You can select more than one role.
 - If the role isn't primary household member, select the member's role relative to the primary household member's role. For example, **Dependent** or **Spouse**.
 9. If you want to roll up activities and information for the client or prospect, select **Primary Group**.
 - Roll-up items are summarized at the household level for all members who have this household as their primary group.
 - To add the member's related business to the household, designate the household as the member's primary group. As a member of the household, the related business's activities and information are also summarized at the household level.
 10. If you enabled this household as a primary group, select which activities and information to roll up when summarizing data at the household level.
 -  **Note:** You can select more than one item to roll up for the client.
 11. Save your changes.

SEE ALSO:

[Create a Household from a Client Profile](#)

Add Education Details

You can store details about a client's education history.

1. In the client's profile, open the Related tab.
2. In the Education section, click **New**.
3. If the client isn't the correct one, remove the client, and select another client or create one.
4. Enter the education institution name and, optionally, the other details.
5. Save the information.


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Add Employment Details

You can store details about a client's employment history.

 **Note:** To show current employer, employed since, and occupation on the client's Details tab, enter the information into the tab.

1. In the client's profile, open the Related tab.
2. In the Employment section, click **New**.
3. If the client isn't the correct one, remove the client, and select another client or create one.
4. Enter the employer's name and, optionally, the other details.
If the client is unemployed with income, unemployed without income, retired, or a homemaker, enter *NONE* for the employer name.
5. Save the information.

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Add Identification Documents

You can store details about documents used to identify a client.

1. In the client's profile, open the Related tab.
2. In the Identification Document section, click **New**.
3. If the client isn't the correct one, remove the client, and select another client or create one.
4. Enter the document details.
5. Save the information.

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Create a Household from the Account Tab

Use households to track groups of clients, businesses, and trusts who have a direct relationship with one another and shared financials. A household is a type of relationship group. Your Salesforce admin can create other relationship group types to fit your business requirements.

 **Note:** You can't delete a household or group or make it inactive.

1. On the Accounts tab, click **New**.
2. Select **Household**.
3. In Account Name, enter the household name (for example, Claire Johnson Household). Leave the other fields empty because they are automatically calculated or don't apply.
4. Save the information.
5. On the Relationships tab, do one of the following.
 - In the relationship map, on the household component, click **+ Add Relationship**.
 - In the Group Members section, click **Edit**.
6. To add other members and relationships, see [Add Household Members and Relationships](#).

EDITIONS

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You can add members from the Relationships tab on the household profile or, if your instance uses the individual model, with the Create Individual builder.

SEE ALSO:

[Add Household Members and Relationships](#)

Create a Household from a Client Profile

Capture the full richness of a client's relationships by adding multiple households. If you can't add a client to more than one household, ask your Salesforce admin to enable the multiple relationship groups custom setting. A household is a type of relationship group. Your Salesforce admin can create other relationship group types to fit your business requirements.

 **Note:** You can't delete a household or group or make it inactive.

1. From a client or business profile, click the **Relationships** tab.
2. Do one of the following.
 - In the Primary Group section, click **New**.

 **Note:** If the client has a primary group, it appears as the section name. You can edit the primary group. A client can have only one primary group.

- On the relationship map, click **+ Add Group**.
 - In the Relationships Group section, click **New**.
3. For the account name, enter the household name (for example, Claire Johnson Household). Leave the other fields empty.
 4. Click **Save & Next**.
 5. To add other members and relationships, see [Add Household Members and Relationships](#).

You can add members from the Relationships tab on the household profile or, if your instance uses the individual model, with the Create Individual builder.


SEE ALSO:

[Create a Client or Prospect with the Individual Builder](#)

[Add Household Members and Relationships](#)

Add Household Members and Relationships

Add members to a household, and relate businesses, trusts, and other people to the household members. Define how to summarize the members' activity and financials at the household level.

 **Note:** If you can't add a client to more than one household, ask your Salesforce admin to enable the multiple relationship groups custom setting.

1. Do one of the following.
 - [Create a Household from the Account Tab](#)
 - [Create a Household from a Client Profile](#)

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Add Members to a Household

Get a full picture of the client's household by adding members.

1. In Create Relationship Group for Member Name, enter a client's name, or click **+ New Contact**.

For a new contact, do the following.

- a. Select the **Individual** or **Person Account** record type, and click **Next**.
 - b. Enter the contact's last name and other information.
 - c. Save the information.
2. Select the member's role.
 - If the member is the primary household member, select **Client**. You can select more than one role for each member.
 - If the member is not the primary household member, select the member's role relative to the primary household member's role, such as **Dependent** or **Spouse**.
 3. If you want to roll up activities and objects for this member, select **Primary Group**.
 - Rollup items are summarized at the household level for all members who have this household as their primary group.
 - Designating a household as a primary group for a member enables you to add the member's related businesses and trusts to the household. As a member of the household, the related business or trust's activities and objects are summarized at the household level.

4. If you enabled this household as a primary group for the member, select which activities and objects, such as financial accounts or financial goals, to roll up when summarizing data at the household level.

 **Note:** You can select more than one item for each member.

5. To designate this person as the primary household member, select **Primary Member**.
Designating a primary member is not required, but a household can have only one primary member.
6. To add another member to the household, click **+ Add Row**, and enter the required information.

Relate a Member's Business or Trust to Their Household

Capture a client's related financial interests by adding details for their businesses and trusts.

1. In the section Do the Members Have Relationships With Other Accounts?, under Related Member, select a household member.

 **Note:**

- To relate businesses or trusts to the member, this household must be the member's primary household. Related business and trust activities and objects can be summarized at the household level.
 - You can add a business or trust to a member in only one primary group.
2. Under Member Role, select the role that describes how the member is associated with the related business or trust.
 3. Under Account Name, select a member's related business or trust or click **+ New Account** and enter the details for the business or trust.
 4. Enable Add to Group to roll up the business's or trust's activities and objects to the household.
 5. To relate another business or trust to the household, click **+ Add Row**, and complete the information.

Relate a Member to Another Person

Capture a client's full relationship network by adding people related to the client.

1. In the section Do the Members Have Relationships with Other People?, under Related Member, select a household member.
2. Under Member Role, select the related role that describes how the contact is associated with the related member.
3. Under Contact Name, select the member's related contact or click **+ New Contact** and enter the contact's details.
4. To relate another person to a household member, click **+ Add Row**, and complete the information.

Add an Extended Relationship to a Client or Household

Better visualize clients' relationships with people outside of their household. Track the other professionals who advise clients about their financial lives. Also track clients' affiliations with owned businesses and other organizational entities.

[Relate a Contact to a Client or Household](#)

Add a lawyer, accountant, or other professional as a related contact. If the business contact is new, create a business account for the contact—every contact belongs to an account in Salesforce. Then associate the contact with a client or household by creating a contact for the business account.

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Relate a Business, Trust, or Another Household to a Household

Associate a business, trust, or another household with a household to track the full picture of a household's relationships.

Relate a Contact to a Client or Household

Add a lawyer, accountant, or other professional as a related contact. If the business contact is new, create a business account for the contact—every contact belongs to an account in Salesforce. Then associate the contact with a client or household by creating a contact for the business account.

1. On the Accounts tab, click **New**.
2. Create a Business account record for the firm that the contact works for.
If you're adding a lawyer as the related contact, create an account record for the law firm.
3. On the Relationships tab of the client or household profile you want to add the contact to, do one of the following.
 - On the relationship map, click **+ Add Contact**.
 - In the Related Contacts section, click **New**.
4. For Contact, select the household member that the business contact is associated with.
The contact must be associated with a specific member, not with the household in general.
5. Click the **Related Contact** field. Select an existing contact, or click **+ New Contact**. If it's a new contact:
 - a. If requested, select the **Business** record type. Click **Next**.
 - b. Enter the contact's last name, and select the account name that you created in the first step.
 - c. Save the contact record.
6. For Related Role, select the role that describes how the contact is associated with the client.
7. Save the related contact record.

The related contact appears on both the client and household profiles. The contact's record detail page also shows the entities that the contact has relationships with.

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Relate a Business, Trust, or Another Household to a Household

Associate a business, trust, or another household with a household to track the full picture of a household's relationships.

You can associate a business, trust, or another household only with a household entity, not with a client. To track a client's relationship with a business, trust, or another household, associate the entity with the client's household.

1. On the Relationships tab of the household profile, do one of the following.
 - On the relationship map, click **+ Add Account**.
 - In the Related Accounts section, click **New**.
2. For Account, verify the name of the household that the account is associated with.
3. Click the **Related Account** field, and select an existing account, or click **+ New Account**. Do the following for a new account.
 - a. If the related account is another household, select the **Household** record type. If the related account is a business or trust, select the **Business** record type. Then click **Next**.


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ACT ON CLIENT RELATIONSHIPS WITH THE ACTIONABLE RELATIONSHIP CENTER (ARC)

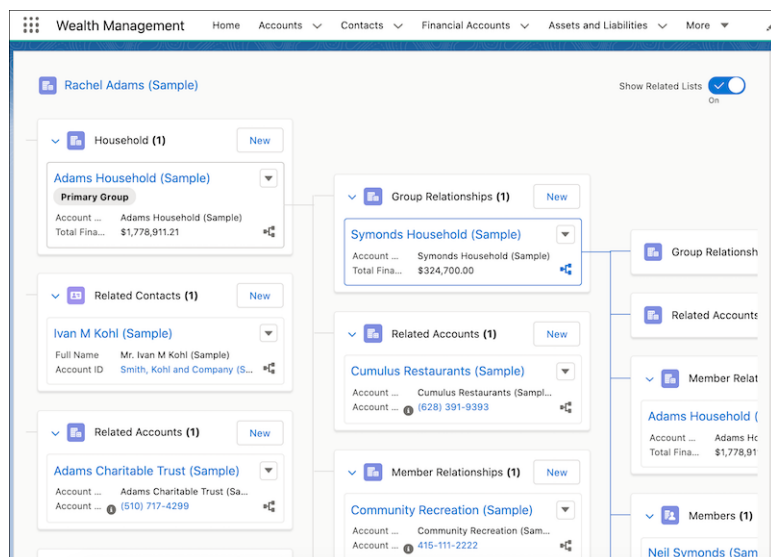
Financial services industry success is built on developing and maintaining deep and trusted client relationships. The Actionable Relationship Center (ARC) gives you a one-stop visualization of your relevant client relationships so you can act on new information.

 **Note:** ARC must be enabled by your admin. If you don't see ARC on your client profiles, ask your admin to enable it. [Learn more](#)

With ARC, you can explore client relationship layers and related records, whether for B2C or B2B contexts. Consider the following common financial services scenarios.

B2C

A wealth advisor advises a high-net-worth client who invests in a charitable trust. The advisor can use ARC to see trusts and charities within the context of the companies that the client's family is invested in. And the advisor can also see the relationships of the client's relatives and their accounts.



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Available in: **Professional**, **Enterprise**, and **Unlimited** editions

B2B

An investment banker advises a large technology corporation that plans to make several acquisitions. The organization's hierarchy involves layers of subsidiaries, executive teams, and professional services contractors, such as law firms and accounting firms. The banker can use ARC to organize all the information.

[Get to Know ARC](#)

ARC is your one-stop shop for visualizing and managing your client’s related accounts and contacts. Here’s what you must know to get started.

[Types of Relationships in ARC](#)

ARC helps users understand relationships among people and businesses by presenting them in an interactive display component. Each relationship type is displayed differently in the interactive ARC visualization.

[ARC Integrations](#)

Extend the functionality of ARC using integrations with other features. When available, these features appear in the ARC side panel.

Get to Know ARC

ARC is your one-stop shop for visualizing and managing your client’s related accounts and contacts. Here’s what you must know to get started.

[Navigate ARC](#)

You can access ARC from any account in the Financial Services Cloud, control how to view ARC, and see your client’s details, all in one place.

[Manage Client Records and Relationships](#)

Conveniently create and manage client records and relationships directly in ARC.

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Navigate ARC

You can access ARC from any account in the Financial Services Cloud, control how to view ARC, and see your client’s details, all in one place.

Your view can differ depending on your personalization and any customization by your admin.

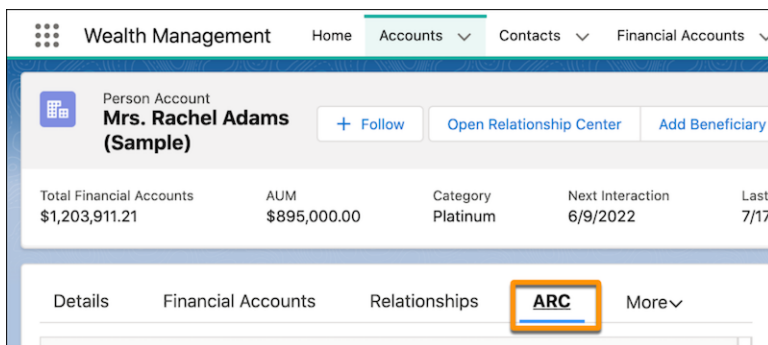
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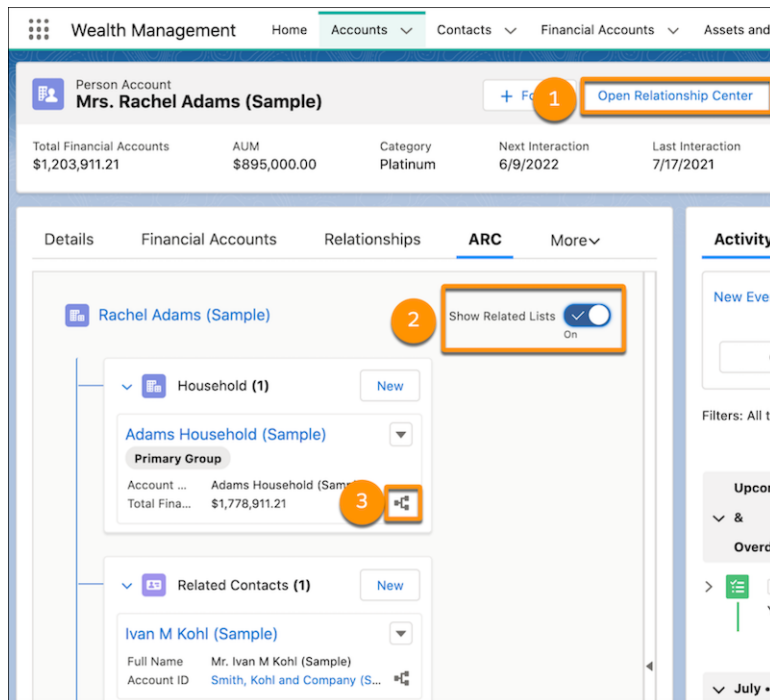
Access ARC

1. Navigate to the account that you want to view. You can select an account from the Accounts tab in the navigation bar or you can search for an account by name in the search bar.
2. Select the **ARC** tab.



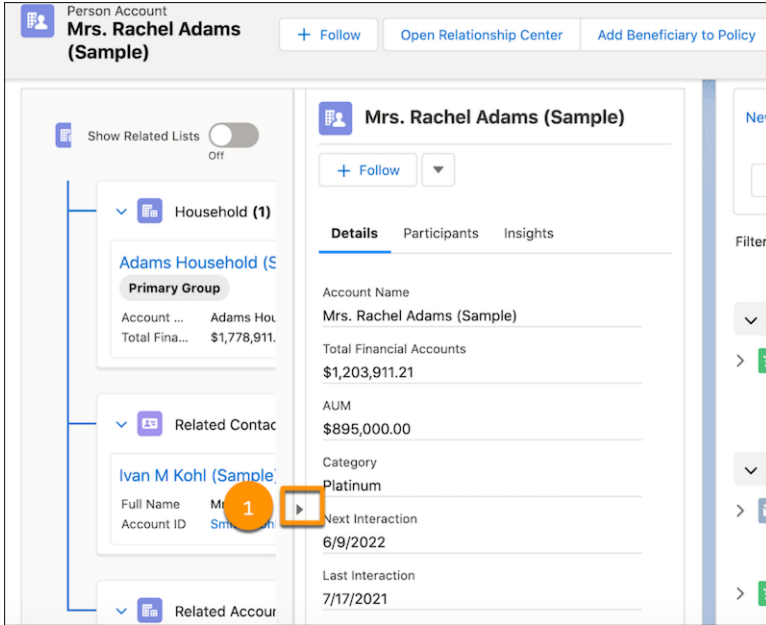
Control Your View of ARC

- To expand the visualization to a full-screen view, click **Open Relationship Center** (1).
- To view the related lists of other information related to a record, turn on **Show Related Lists** (2). Links and details for associated records are grouped within related lists. With some related lists, you can perform common tasks such as creating records or attaching files.
- The map icon (3) indicates that you can expand the card to show other related cards. To expand the account's related records, click anywhere within the card.

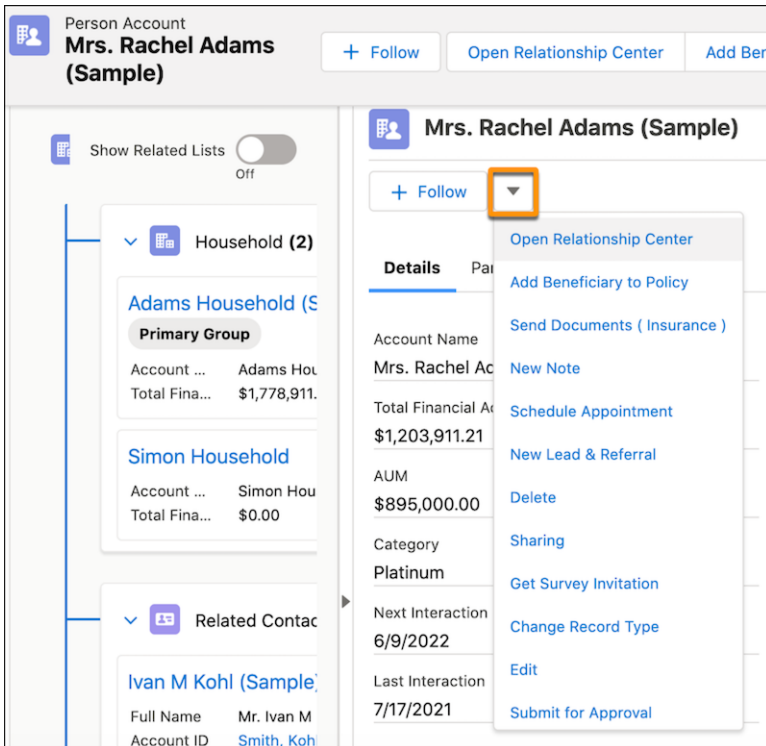


View Record Details in ARC

The Details tab within the side detail panel displays record highlights and summaries. These can be customized by your admin. To expand the detail panel, click the arrow on the right side of the ARC visualization.



Use the Details tab to conveniently access the same quick actions that are available for the record type. To access quick actions, click the arrow to expand the dropdown menu.



SEE ALSO:

- [Manage Client Records and Relationships](#)
- [Types of Relationships in ARC](#)
- [ARC Integrations](#)
- [Key Terms](#)

Manage Client Records and Relationships

Conveniently create and manage client records and relationships directly in ARC.

Your view can differ depending on your personalization and any customization by your admin.

You can conveniently manage client records and relationships directly from the ARC visualization in the following ways.

[Create a Household in ARC](#)

ARC makes creating households even easier by allowing you to create a household directly from ARC's visualization.

[Create Records and Relationships in ARC](#)

You can create records directly from the ARC visualization.

[Edit a Record in ARC](#)

You can edit records that appear in ARC directly on the ARC record card.

[Edit or Delete a Relationship in ARC](#)

You can edit records that appear in ARC directly on the ARC record card.

[Add a Record to a Related List in ARC](#)

You can view and add items to related lists associated with an account or household directly in ARC.

SEE ALSO:


- [ARC Integrations](#)
- [Types of Relationships in ARC](#)

Create a Household in ARC

ARC makes creating households even easier by allowing you to create a household directly from ARC's visualization.

You can create a household from an account in ARC.

1. Navigate to the account you want to add to a household.

 **Note:** You can select an account from the Accounts tab in the navigation bar or you can search for an account by name in the search bar.

2. Select the **ARC** tab.
3. Find the Household card.

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4. Click the **New** button on the top right of the card.
5. In the Account field, select **+ New Account**.
6. Select **Household**.

New Account

Select a record type

- Household**
A grouping of related people and institutions
- Business**
A business or an organization
- Institution**
An institution that is a prospect or a client
- Person Account**

Cancel **Next**

7. Click **Next**, then enter the information for the household.
8. Click **Save**.

Create Records and Relationships in ARC

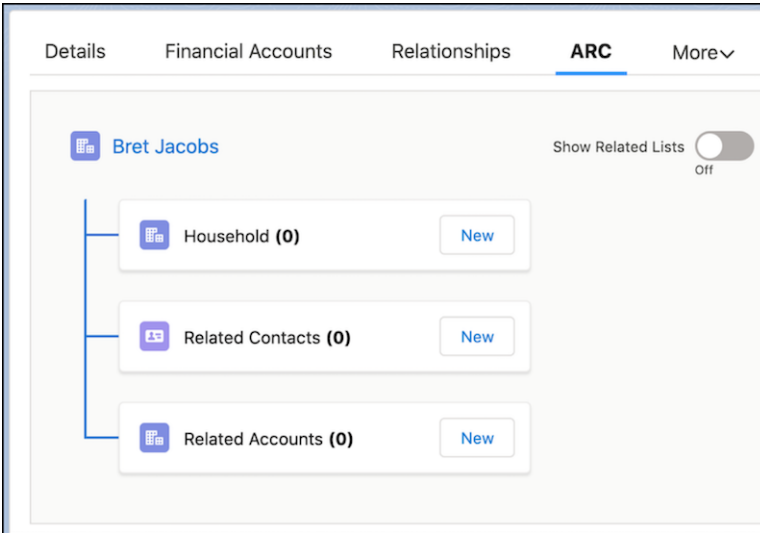
You can create records directly from the ARC visualization.

1. On the account page, click the **ARC** tab.
2. To select the type of relationship, click **New**. The available relationships depend on your admin's configuration settings.

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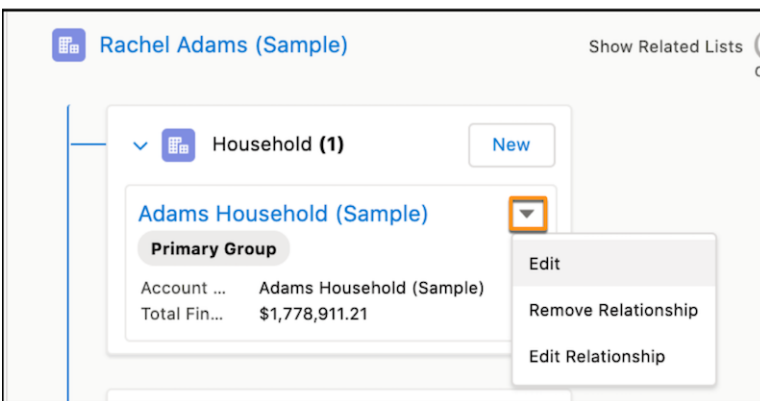


3. To add a record, select either **+ New Account** or **+ New Contact**. To add an existing record, search for the account or contact name by entering it into the respective field.
4. Select a record type.
5. Complete the required fields in the New Account form.

Edit a Record in ARC

You can edit records that appear in ARC directly on the ARC record card.

1. Navigate to the record card for the record you want to edit.
2. Click the dropdown arrow, and select **Edit**.



3. Change information on the record form as desired.
4. Make your changes, and click **Save**.

EDITIONS

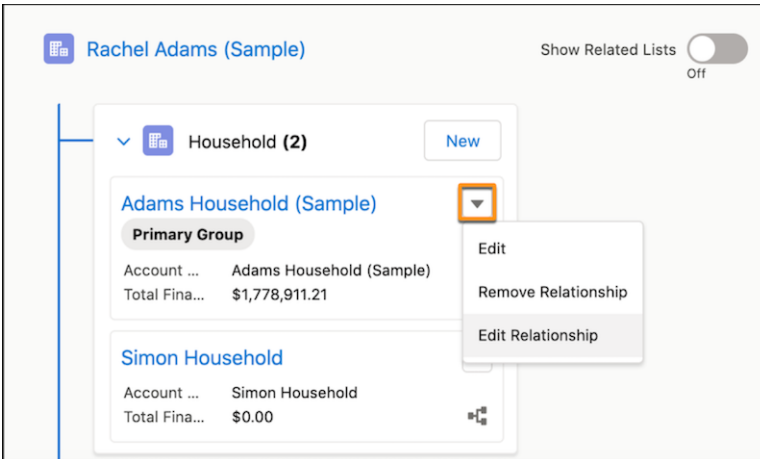
Financial Services Cloud is available in Lightning Experience.

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Edit or Delete a Relationship in ARC

You can edit records that appear in ARC directly on the ARC record card.

1. In ARC, navigate to the relevant relationship card.
2. Click the dropdown arrow.



3. To edit a relationship, select **Edit Relationship**, make your changes, and save.
4. To delete a relationship, select **Remove Relationship**.

Add a Record to a Related List in ARC

You can view and add items to related lists associated with an account or household directly in ARC.

1. In ARC, navigate to the account you want to add a related record to, and click the **ARC** tab.
2. If your related lists aren't visible, enable the **Show Related Lists** toggle.

EDITIONS

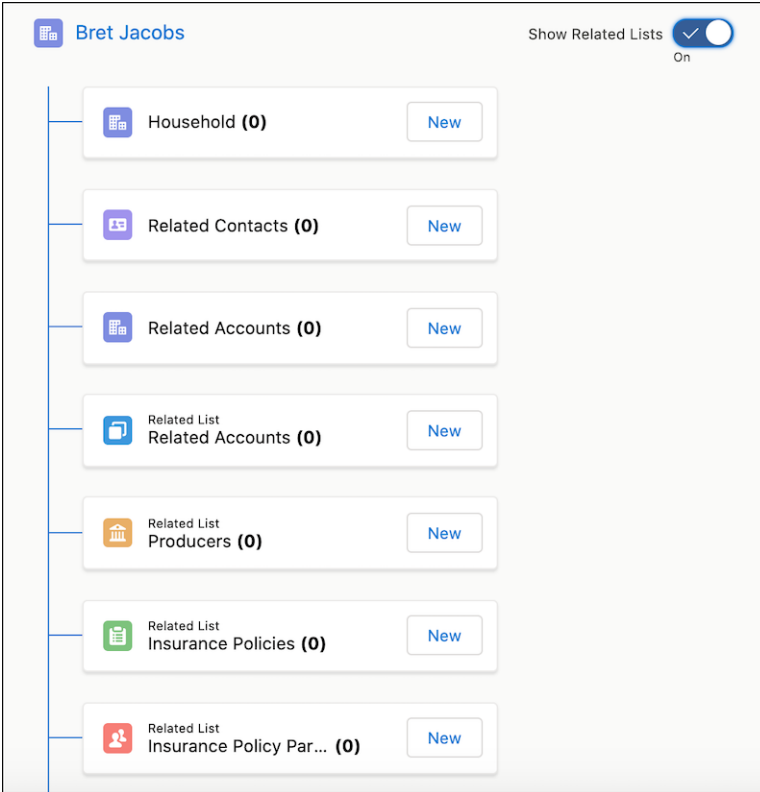
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3. Find the Related List card that best suits the record you want to add, and click **New**.

 **Note:** Your Related List options are the same options that appear on the Related tab of the record page. ARC shows up to 10 related lists, and the available options appear below the other ARC elements.

4. If the record is new, complete the standard form for the related list. If it's an existing record, you can search for it in the form. For example, to add an existing insurance policy to an account's insurance policy related list, search for the policy number in the popup.

5. Click **Save**.

Types of Relationships in ARC

ARC helps users understand relationships among people and businesses by presenting them in an interactive display component. Each relationship type is displayed differently in the interactive ARC visualization.

ARC displays the following types of account relationships and other related records:

Account-Account Relationships (AARs)

The relationship between businesses, institutions, and groups.

For example, a household can have AARs with a law firm, hospital, accounting firm, or bank.

Relationships between accounts (AAR) are categorized by the following predefined Association Types:

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	<ul style="list-style-type: none"> • Group: Indicates that an Account is a group that contains other accounts. For example, a parent company account can have a Group Relationship with one or more subsidiary accounts. Or, a household can be a group with related members. • Member: Indicates that the first account belongs to the second account in some way. For example, a person account can be a member of a household account. • Peer: Indicates that the primary and secondary accounts are related, but don't contain or control each other. For example, a business account can have a Peer relationship to another business that is an important supplier.
Account-Contact Relationships (ACRs)	<p>The relationship between a person and a business or other account. ACRs can aggregate contact details in a group account. Assign roles to contacts in a group account, such as primary, spouse, and dependent.</p> <p>For example, a business can have an ACR with the person who acts as the business' vendor.</p>
Contact-Contact Relationships (CCRs)	<p>The relationship between two people that aren't within the same household or account. CCR relationships help you develop referrals, leads, and opportunities.</p> <p>For example, the relationship between a borrower and a lender can be a CCR.</p>

ARC Integrations

Extend the functionality of ARC using integrations with other features. When available, these features appear in the ARC side panel.

-  **Note:** Your admin must configure these integrations. You won't see these options if your admin hasn't configured them.
- **Compliant Data Sharing:** on page 37 Compliant data sharing allows an account or opportunity record owner to share a record with other relevant users.
- **Einstein Relationship Insights:** Einstein Relationship Insights displays intelligent recommendations from the web that enable you to expand your relationship networks within ARC. With ERI, you can uncover hidden relationships, create records for valid recommendations, and dismiss invalid recommendations.

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The screenshot displays the Cumulus Banking Console interface for the 'Rachel & Nigel Adams Household' account. The top navigation bar includes the Cumulus logo, a search bar, and account details. Below this, a summary section shows 'Total Financial Accounts' with a balance of \$1,323,540 and 'AUM' of \$324,500, along with 'Next Interaction' and 'Last Interaction' dates.

The main content area is divided into several sections:

- Members (4+):** Lists primary members: Rachel Adams (Senior Scientist, AUM: \$3,342,000), Nigel Adams (Small Business Owner, AUM: \$723,000), and Sophie Adams (Student, AUM: \$250,000).
- Group Relationships (1):** Shows the 'Rachel & Nigel Adams Household' with an AUM of \$1,130,000 and a last interaction on 4/14/2020.
- Related Contacts (2):** Lists Linda Miller (CRJ, Partner, Phone: (320) 497-4419) and Jason Jennings (Attorney, Partner, Phone: (320) 423-1231).
- Products (2):** Includes 'Vanguard Securities Stocks' (Amount: \$100,000, Stage: 02 - Prospecting) and 'Vanguard Securities Cash' (Amount: \$50,000, Stage: 02 - Prospecting).
- Notes & Attachments (2):** Lists 'Vanguard Securities Account' (Type: PDF, Stage: 01/01/2020) and another 'Vanguard Securities Account' (Type: PDF, Stage: 01/01/2020).
- Member Relationships (1):** Shows 'Adams Family Trust' (Year Started: 2010, AUM: \$6,343,000).
- Referrals (0):** Currently empty.
- Financial Goals (2):** Includes 'Adams HH - Vanguard Account Tra...' (Close Date: 1/31/2021, Stage: 02 - Prospecting) and 'College Fund'.

On the right side, there is a profile for 'Jason Jennings' with tabs for 'Details', 'Intelligence', and 'Participants'. Below this is a 'Potential Records (7)' section featuring a network diagram with nodes for 'Carly Mercado', 'MIT', 'Jason Jennings', 'El Ross', 'Ulrich Han', 'Samsome Attorneys', and 'Vince Morris'.

The bottom of the interface features a navigation bar with icons for Phone, Recent Items, Quip, Notes, and a Notification Console.

ENTER AND VIEW FINANCIAL DATA

Create records for clients' financial accounts and their underlying holdings, assets, liabilities, and financial goals.

The types of financial accounts available vary between the Retail Banking and Wealth Management apps. Also, your Salesforce admin can increase or restrict the types of accounts available.

[Manually Add a Financial Account](#)

Information for an investment account, bank account, or insurance policy is typically updated automatically from an external system. However, you can also manually create a financial account.

[View Financial Account Transactions](#)

Use the financial account's Related items to view its transactions.

[View Financial Account Billing Statements](#)

Use the financial account's Related items to view its billing statements.

[View Holdings Within an Investment Account](#)

You can view the holdings of an investment account.

[Add Holdings to an Investment Account](#)

You can add purchase history and details about financial holdings in an investment account.

[Manually Create Securities Records](#)

Enter information about securities, such as stocks or bonds. While this data is typically updated automatically from external systems, here's how to enter a securities record manually.

[Add an Asset or Liability](#)

You can add information about tangible assets, such as real estate or collectibles, or liabilities, such as mortgages or loans.

[Add a Financial Goal](#)

Create a financial goal to track a client's progress toward major purchases, retirement savings, or other life goals. You can only create savings-oriented goals. You can't create a goal for paying down a debt. You also can't associate a goal with a specific financial account.

[Add a Financial Account Role](#)

Enter information about a client's involvement with a financial account, such as joint owner, a beneficiary, or trustee.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Manually Add a Financial Account

Information for an investment account, bank account, or insurance policy is typically updated automatically from an external system. However, you can also manually create a financial account.

1. On the Financials (Retail Banking) or Financial Accounts (Wealth Management) tab of the client or household profile, click **New** in the section for the account you want to create.
2. Enter the relevant information.
The Primary Owner can be a household member or an organizational entity. It can't be a household.

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For an investment account, if your firm manages or administers the account, select *Managed*. This setting rolls up the account balance to the household's assets under management (AUM) field. If the account is an in-house product, make sure that *Head Away* is not selected.

3. Save the information.

You can edit or delete a financial account from the Financials tab and Financial Accounts tab.

If you created the financial account from the client profile and the client's financial account information is summarized at the household level, the account is visible in the household profile. If the financial account is jointly owned, the full balance is displayed in each account owner's profile.

However, if some or all account owners belong to the same household and their financial account summaries roll up to the primary group, the balance is counted only once in the summary calculation.

If the primary owner is an organization, the balance is included in the client's household rollup summary if **Include in Group** is enabled on the organization's relationship with the client.

SEE ALSO:

[Create a Wallet Share Opportunity](#)

View Financial Account Transactions

Use the financial account's Related items to view its transactions.

1. On the Financials (Retail Banking) or Financial Accounts (Wealth Management) tab of the client or household profile, click the name of the financial account you want to view.
2. On the Related tab, locate the Financial Account Transactions item.
3. If necessary, click **View All** to see all transactions.

EDITIONS

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Available in: **Professional**, **Enterprise**, and **Unlimited** editions

View Financial Account Billing Statements

Use the financial account's Related items to view its billing statements.

1. On the Financials (Retail Banking) or Financial Accounts (Wealth Management) tab of the client or household profile, click the name of the financial account you want to view billing statements for.
2. On the Related tab, locate the Billing Statements item.
3. If necessary, click **View All** to see all statements.
4. To view a statement, click it.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

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View Holdings Within an Investment Account

You can view the holdings of an investment account.

- On the Financial Accounts tab of the client or household profile, click the arrow icon to the left of the investment account name to expand the list of investments.

If you don't see an icon, holdings information isn't available.

SEE ALSO:

[Add Holdings to an Investment Account](#)

Add Holdings to an Investment Account

You can add purchase history and details about financial holdings in an investment account.

To add a holding, the securities records must exist. If the securities record doesn't exist, create it before adding the holding.

1. On the Related tab of the client or household profile, click **New** in the Financial Holdings section.
2. Enter a name, such as *Salesforce shares*.
3. Select the ticker symbol.
4. Under Financial Account, select the investment account for this holding.
5. Enter purchase details.
6. Save the record.

SEE ALSO:

[Manually Create Securities Records](#)

[View Holdings Within an Investment Account](#)

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Manually Create Securities Records

Enter information about securities, such as stocks or bonds. While this data is typically updated automatically from external systems, here's how to enter a securities record manually.

Make sure that the securities data is entered before you add holdings for investment accounts. Otherwise, you can't specify that the security is part of a holding.

1. From the navigation menu, open the Securities tab, and click **New**.
2. Enter the ticker symbol, securities name, and other relevant information.
3. Save the record.

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Add an Asset or Liability

You can add information about tangible assets, such as real estate or collectibles, or liabilities, such as mortgages or loans.

1. On the Financials (Retail Banking), Financial Accounts (Wealth Management), or Related tab of the client or household profile, click **New** in the Assets and Liabilities section.
2. Select *Asset* or *Liability*.
3. Enter the information and save the record.

EDITIONS

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Add a Financial Goal

Create a financial goal to track a client's progress toward major purchases, retirement savings, or other life goals. You can only create savings-oriented goals. You can't create a goal for paying down a debt. You also can't associate a goal with a specific financial account.

1. On the Goals tab of the client or household profile, click **New** in the Goals Summary section.
2. Enter a name for the goal.
3. Select the household member who is the goal's primary owner.
4. Enter the relevant information and save the record.

If you created the goal from the client profile and the client's goals are summarized at the household level, the goal is also visible in the household profile.

You can edit or delete a goal in the Goals tab or the Related tab.

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Add a Financial Account Role

Enter information about a client's involvement with a financial account, such as joint owner, a beneficiary, or trustee.

1. On the Financials (Retail Banking) or Financial Accounts (Wealth Management) tab of the client profile, click **New** in the Financial Account Roles section.
2. Select the financial account and the role that describes the client's involvement.
3. Enter the relevant information and save the record.



Note: On the Related tab of the client profile, you can see all the financial account roles that the client has. The Related list includes the Primary Owner and Joint Owner roles, which are created and updated automatically when you indicate that the client is a primary or joint owner on a financial account record.

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MANAGE CLIENT INTERACTIONS

It's easy to track tasks, client communications, and account-related issues.

Create a Case from Financial Accounts

Create a case for questions, feedback, and other issues related to financial accounts. You can then track the case on the financial account or client profile page.

Track Client Interactions

Track tasks and events and log client communications to maintain a history of your client interactions.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Create a Case from Financial Accounts

Create a case for questions, feedback, and other issues related to financial accounts. You can then track the case on the financial account or client profile page.

1. From a client's profile, click **Financial Accounts**.
2. Next to a financial account name, from the dropdown menu, select **New Case**.

FINANCIAL ACCOUNT NAME	TYPE	OWNER TYPE	DATE OPENED	BALANCE	
Retirement Account		Primary			<ul style="list-style-type: none">New Opportunity (Wallet Share)New CaseEditDelete

EDITIONS

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3. Enter the information about the case.
4. Save your changes.

The case is associated with the client's financial account.

SEE ALSO:

[Set Up and Manage Cases](#)

Track Client Interactions

Track tasks and events and log client communications to maintain a history of your client interactions.

1. On the client profile, go to the Activity tab.
2. On the appropriate tab, schedule a task or event, send an email, or log a call.
If a client's tasks or events are included in their household's rollup summary, they are also displayed on the household profile's Activities Related List on the Related tab.

Consider the following when tracking client interactions.

- Your Salesforce admin can designate which activities affect the Last Interaction and Next Interaction dates that you see on the client and household profiles. Ask your admin for details.
- You enter Last Review and Next Review dates manually. These dates are not calculated automatically based on a client's review frequency. Last Review and Next Review dates are not related to the client's task or event dates, even if a task or event is a review meeting.

SEE ALSO:

[Tasks](#)

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TRACK LEADS AND OPPORTUNITIES

Quickly create wallet share opportunities, track prospects, and convert leads.

[Create a Wallet Share Opportunity](#)

To track a wallet share opportunity, create an opportunity record for a financial account.

[Create a Lead](#)

Create a lead record to track a prospect.

[Convert a Lead to a Client](#)

You can convert a lead record to a client record.

EDITIONS

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Create a Wallet Share Opportunity

To track a wallet share opportunity, create an opportunity record for a financial account.

1. On the Financials (Retail Banking) or Financial Accounts (Wealth Management) tab on the client profile, select the actions icon next to the name of the financial account.
2. Select **New Opportunity (Wallet Share)**.
3. Enter the name and stage, adjust the close date if necessary, and add any other relevant details.
4. Save the record.

SEE ALSO:

[Opportunities](#)

EDITIONS

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Create a Lead

Create a lead record to track a prospect.

1. From the navigation bar, go to the Leads list view, and click **New**.
2. Select the appropriate lead record type, and click **Next**.
3. Enter the name, company name, lead status, and other relevant details.
4. Save the information.

SEE ALSO:

[Salesforce Help: Leads](#)

EDITIONS

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Convert a Lead to a Client

You can convert a lead record to a client record.

1. On the lead detail page, click **Convert**.
2. Click in Account Name, and select **New Account**.
3. Select the Individual record type, and click **Next**.
4. Enter relevant details.
5. Save the new account.
6. If you want to create an opportunity record associated with the converted lead, enter an opportunity name.
7. Click **Convert**.
8. Close the confirmation message, or click **Go to Leads** to create more lead records.

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WORK WITH COMPLIANT DATA SHARING

Administrators can enable Compliant Data Sharing for Account and Opportunity objects. Administrators and compliance managers then configure data sharing roles with associated access levels to adhere to compliance with regulations and company policies. An account or opportunity record owner shares a record with other relevant users.

A participant is an internal user who's been assigned a Participant Role for a record. The participant role assigned to the participant determines their record access level.

[Add Participants to Records for Compliant Data Sharing](#)

Record owners and non-owner participants who have edit access to a record can assign participants to that record.

[Manage Participants for Private Opportunities in Compliant Data Sharing](#)

When an opportunity is private, it can't be shared with Compliant Data Sharing.

[View Users with Compliant Data Sharing Record Access](#)

To see all the users who have access to a record you own, use the Sharing button on the record's detail page.

EDITIONS

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Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Add Participants to Records for Compliant Data Sharing

Record owners and non-owner participants who have edit access to a record can assign participants to that record.

User Permissions Needed


To create participant groups:	Financial Services Cloud Extension Permission Set WITH Configure Compliant Data Sharing System Permission
To be a member of a participant group:	Financial Services Cloud Extension Permission Set WITH Use Compliant Data Sharing System Permission


EDITIONS




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Available in: **Professional**, **Enterprise**, and **Unlimited** editions

Records for objects that have Compliant Data Sharing enabled show participants in a related list. Add a participant to a record using the participant related list.

 **Note:** If the relevant related list isn't on your page layout, talk to your Salesforce administrator.

 **Note:** A record can have a maximum of 20 participants.

1. From the object detail page, click the **Related** tab.
2. In the Account Participants or Opportunity Participants related list, click **New**. In the window that opens, the Account or Opportunity field is set to the current record.
3. Enter the name of an active participant role in **Participant Role**, and select the role from the list.
 -  **Note:** Participant Roles aren't shared between objects. Enter an account participant role for an account record or an opportunity participant role for an opportunity record.
4. Enter notes or instructions to users about this role in **Comments**.
5. Select a user or a participant group in **Member**.
 -  **Note:** A user must have the **Use Compliant Data Sharing Permission** to be an account or opportunity participant.
 - a. To add a user, select **People** from the dropdown list.
 - b. To add a participant group, select **Group** from the dropdown list.
 - c. Enter the name of the user or participant group to add, and select it from the dropdown list.
 -  **Note:** If you select a user who doesn't have the Use Compliant Data Sharing permission, you receive an error when you click **Save**.
6. Select **Active**. If Active is disabled, no share table entries are created. If Active is enabled, share table entries are created when the org-wide sharing default is less than the sharing access defined by the selected participant role.
7. Click **Save**.

SEE ALSO:


[Financial Services Cloud Administrator Guide: Configure Page Layouts for Compliant Data Sharing](#)

Manage Participants for Private Opportunities in Compliant Data Sharing

When an opportunity is private, it can't be shared with Compliant Data Sharing.

You can't assign opportunity participants to an opportunity set to **Private**.

If an opportunity record has opportunity participants with associated share table entries, the share table records are deleted when **Private** is enabled for the opportunity. The opportunity participant records aren't deleted when **Private** is enabled for the opportunity.

 **Note:** We recommend that you delete all opportunity participants for an opportunity before enabling **Private** for that opportunity.

If a private opportunity has opportunity participants and **Private** is disabled, share table records aren't generated even when the associated participant role access is greater than that granted by organization-wide defaults. To create share table records for an existing opportunity participant of a previously private opportunity:

- Delete and recreate the opportunity participant.
- Edit the opportunity participant record, deselect **Active** and save your work. Then edit the same opportunity participant record, select **Active**, and save your work.

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions

View Users with Compliant Data Sharing Record Access

To see all the users who have access to a record you own, use the Sharing button on the record's detail page.

The Sharing Detail page in Salesforce Classic shows users with access to a record, their level of access, and the reason they have access. The share table entries for Compliant Data Sharing show a sharing reason of Compliant Data Sharing.

 **Note:** You must be an admin or the record owner to see the **Sharing** button on a record's detail page.

Non-owner users have sharing table records only when their assigned level of access exceeds that granted by default in your org.

1. In Salesforce Classic click the **Accounts** or **Opportunities** tab.
2. For account records on the Accounts or tab, click **All Accounts** and click **Go**.
3. For opportunity records, on the Opportunities or tab, click **All Opportunities** and click **Go**.
4. Select the account or opportunity name to view.
5. Click **Sharing**. The list shows of users with access to the record. Account participant and opportunity participant users are shown with a sharing reason of Compliant Data Sharing.
6. To see an expanded list of users, including administrators, with access to the record, click **Expand List**.
7. In the expanded view, click **Why?** next to a user for details about how this user obtained their access level.

SEE ALSO:

[Financial Services Cloud Administrator Guide : Add the Sharing Button to Page Layouts](#)

EDITIONS

Financial Services Cloud is available in Lightning Experience.

Available in: **Professional**, **Enterprise**, and **Unlimited** editions

USE FINANCIAL SERVICES CLOUD CRM ANALYTICS SOLUTIONS

Financial Services Cloud offers you advanced analytics solutions based on CRM Analytics to help you grow and manage your business. CRM Analytics for Financial Services, a comprehensive set of CRM Analytics dashboards, helps financial service executives and managers, advisors, and personal bankers manage their books of business with insights about client goals and satisfaction, leads, and referrals. Client Segmentation App, which replaces the dashboards formerly available through the Financial Services Cloud Advisor Analytics tab, helps financial advisors identify high-potential clients for outreach.

EDITIONS

Available in Lightning Experience for an extra cost in **Professional, Enterprise, and Unlimited** Editions

[Use Analytics for Wealth Management](#)

Analytics for Wealth Management gives financial advisors, personal bankers, and managers a complete customer intelligence solution.

[Use CRM Analytics for Insurance](#)

The insurance-specific analytics for Financial Services Cloud (FSC), a comprehensive set of CRM Analytics dashboards, offers insurance executives and managers insights into their book of business and identifies opportunities to improve sales.

[Use Analytics for Retail Banking](#)

Analytics for Retail Banking dashboards visualize all the metrics and key performance indicators (KPIs) personal bankers require to grow client relationships.

[Use Consumer Banking Starter Analytics](#)

The Consumer Banking Starter Analytics gets you started with a dashboard personal bankers can use to move clients up the value chain.

[Use Wealth Starter Analytics](#)

The Wealth Starter Analytics app helps financial advisors get started fast analyzing the success of your financial services business.

[Use the Client Segmentation App](#)

Client Segmentation App dashboards help you gain insights across your book of business to deepen client relations. It's enabled by a license that provides restricted access to Tableau CRM features.

[Use the Product Recommendation Dashboards](#)

Get product recommendations for customers who are most likely to buy your products.

SEE ALSO:


[Personalize the Navigation Bar in Lightning Experience](#)

[Explore Data and Take Action with CRM Analytics](#)

[Track Client Interactions](#)

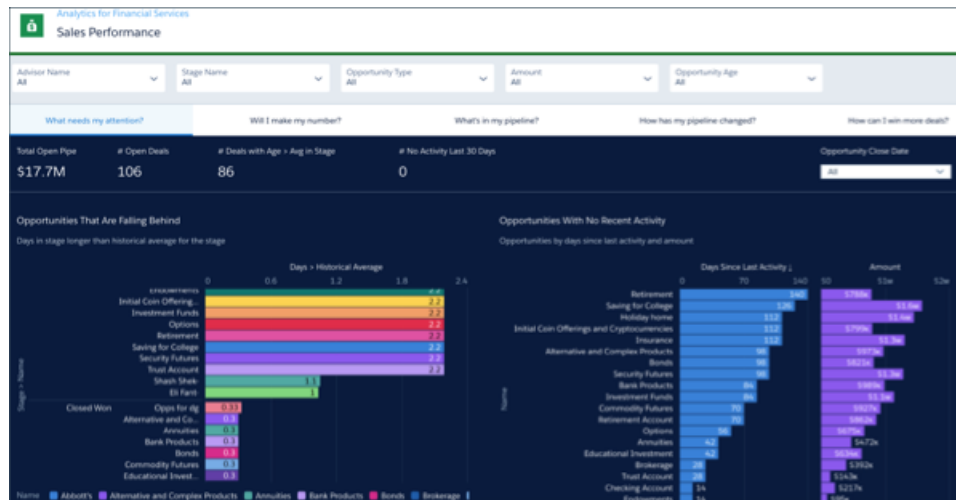
Use Analytics for Wealth Management

Analytics for Wealth Management gives financial advisors, personal bankers, and managers a complete customer intelligence solution.

 **Note:** Administrators can set up your org with Analytics for Wealth Management by following the steps in [Deploy CRM Analytics for Financial Services](#).


EDITIONS

Available in Lightning Experience for an extra cost in **Professional**, **Enterprise**, and **Unlimited** Editions




Analytics for Wealth Management's prebuilt dashboards offer actionable insights about your book of business. They visualize the metrics advisors can use to stay on top of client goals and satisfaction, leads, and referrals. Its license provides complete access to CRM Analytics Plus platform features. It includes Einstein Discovery, which you use to create automated artificial intelligence models on any dataset without writing code.

The CRM Analytics for Financial Services license also gives you access to the Analytics for Insurance, Analytics for Retail Banking, Consumer Banking Starter Analytics and Wealth Starter Analytics templates. Your Salesforce admin can create apps from them to help you take the first steps of your Analytics journey.


 **Note:** See Analytics Limitations in Salesforce Help to learn more about CRM Analytics Plus platform functionality.

Open the app.

1. From the app picker , select **CRM Analytics Studio** to open the CRM Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app to open it. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.

Click **Dashboards** to view all app dashboards. Click an element in any of the charts at the top of a dashboard page to see details in the list view below the chart.

After clicking an element in a dashboard, you'll see **Modified** and a revert icon at the top of the dashboard, next to its title, like this

 . Click the revert icon to return the dashboard to its original state.

In dashboard pages with a details table, take action from the table by rolling the cursor over an item in the **Name** column. Then, click the disclosure triangle at the right and select an action from the menu that appears.

Dashboards for Financial Advisors and Personal Bankers

View these dashboards by clicking **Financial Advisor Home**. Advisors and personal bankers start here for summary metrics about the state of the business. Click **Open Dashboard** beneath the summaries to drill into details behind the summary metrics.

Client Acquisition dashboard. Target high-opportunity leads for immediate action and provides insights into leads/referral sources, conversion rates, and trending. Organized into the following pages:

- *What needs attention?* Identifies leads that have stalled, or have had no activity, for immediate action.
- *Lead/Referral Sources.* Identifies high opportunity leads and referrals.
- *Tracking leads/referrals.* Visualizes what's happened to leads and how far they've proceeded if they haven't converted yet.
- *Conversion.* Shows the kinds of leads and referrals you've had most success with by product, time, and number of touches or activities.
- *Lead pipeline trending.* Provides insight into how leads have changed over time and flow of leads in and out of the pipe in between those two snapshots. Select different dates in the filters at left to change the time period.

[See additional detail](#) on page 48.

Client Interactions dashboard. Identify clients who may require immediate action and track and understand the results of client management activities. Organized into the following pages:

- *Overview.* Shows clients that may have been neglected and their importance according to assets under management (AUM) or other metrics. Also shows days since last contact with clients, clients whose AUM has dropped, and clients with overdue tasks.
- *Activity History.* Shows how an advisor has spent their time according to activity type and time period.
- *Activity Outcomes.* Shows the results of activities. Click any week to see clients that you met that week and metrics for those clients, including AUM, deposits, wallet share, and assets under advisement.

[See additional detail](#) on page 50.

Events and Seminars dashboard. Track the performance of events and seminars. Start by visualizing attendance across events over time, and then drill into event performance by costs, response rates, and conversion rates. Data comes from the Campaign object, where campaign type is Event.

[See additional detail](#) on page 51.

My Book of Business dashboard. Start with an overview of your financial book of business and how it has changed over time. Includes alerts to changes compared to last month, quarter, and year. Drill into data through the following pages:

- *Product Portfolio Mix.* Provides insight into which products provide the opportunity to boost sales based on current and historic mix.
- *Transactions.* Shows the net inflow to and outflow from your portfolio and identifies clients who have added or withdrawn from their accounts.
- *Earnings and Fees.* Visualizes advisor commissions and fees and revenues for the entire organization

[See additional detail](#) on page 46.

My Clients dashboard. Identify clients for appropriate action based on recency of interactions with them, attrition risk, or portfolio value. Organized into the following pages:

- *Who needs my attention?* Single out clients at risk of possible attrition or who may need extra attention. Shows clients who have withdrawn funds, lost funds in the market, or logged cases with customer service.
- *Who are my top clients?* Organizes specific clients based on their wallet share and length of relationship with the company so you can see which ones require most attention.

- *What demographics do I serve?* Helps you better understand the profile of a typical client and high-net-worth clients. Categorizes clients by net worth, length of relationship, geography, and other criteria.
- *Are clients reaching their goals?* Identify clients who may need help progressing toward their financial goals. Shows progress toward goals by client type, percent completion of goals, and size of goals.

[See additional detail](#) on page 47.

My Households dashboard. Similar to My Clients, except focused on households. Not all metrics from accounts roll up to the household level, so shows separate pages for only top households and demographics.

[See additional detail](#) on page 52.

Sales Performance dashboard. Visualize progress toward sales goals over time. Organized into the following pages:

- *What needs my attention?* Highlights high-value opportunities that require immediate action from the team. Shows opportunities that have stayed in a stage longer than the average for the stage, and those where there's no recent activity.
- *Will I make my number?* Shows your team's progress toward quota, including your target and the number of business days left in the period. View quarter-over-quarter and year-over-year historic comparisons and select new or existing customers. View contributions of individual team members by selecting them from the **Advisor Name** global filter at the top.
- *What's in my pipeline?* To help you zero in on high-opportunity segments of the pipeline, shows open pipe by stage, market segment, and opportunity type. Also shows total open pipe and open deals.
- *How has my pipeline changed?* Trends your pipeline, showing how it has changed between two dates (for example, quarter to date) for opportunities that are forecast to close within a specific time period. Change the Pipeline Start and End Date filter to view deals for a preset period (year, quarter, month, and so on), or select a custom period.
- *How can I win more deals?* Visualizes how and why advisors, bankers, and managers can win more deals (or lose them) by market segment and opportunity type, and over time.

[See additional detail](#) on page 53.

Dashboards for Executives and Managers

Managers and executives start here to evaluate the performance of the performance of advisors and bankers who report to them at the team/office and regional levels. Team key performance indicators include assets under management, closed won business, and leads/referrals. Click **Open Dashboard** beneath the summaries to drill into details behind the KPIs. The dashboards assume a structure of State City Advisor, with filters for each category. You can customize them to reflect your own hierarchy if it's different.

Team Book of Business dashboard. Provides a team view of the book of business. Organized into the following pages:

- *Team Leaderboard.* The default page, ranking team members according to total AUM, total financial accounts, and new AUM.
- *Regional View.* Ranks performance by geographic location.
- *Drivers of Success.* View correlations between performance and activities. Select performance metrics such as \$AUM or #Clients and see the correlation with progress metrics related to any activity, lead, or opportunity.
- *Comparative Trend.* Review advisor progress over time so you can see how each team member performs in their first few months or as compared to their peers.
- *1-on-1 Helper.* Provides performance metrics and rankings for your personal bankers.

Team Sales Performance dashboard. Evaluate each advisor's performance with focus on whether they will make their quotas. Rank team members using three different metrics and track performance of each advisor for the quarter. And drill down to individual opportunities in the details table. Select **Opportunity Processing** to evaluate advisor efficiency.

Team Client Acquisition dashboard. Evaluate advisor effectiveness at bringing new clients into the business. The main chart shows how each team member's leads progress through the pipeline. The secondary charts show conversion rates and the number of touches

required to convert leads and referrals. Select **Events and Seminars** to view the effectiveness of those activities at a regional and office level based on attendance, costs, conversion rates, and other KPIs.

Dashboards for Embedding

CRM Analytics for Financial Services includes dashboards that can be embedded and accessed in Lightning Experience pages. Your Salesforce administrator can embed the dashboards for your organization.

Home. Intended for providing top-level metrics and insights to advisors through the Financial Services Cloud Wealth Management application. It can be embedded anywhere you want to view CRM Analytics insights. It includes two tabs:

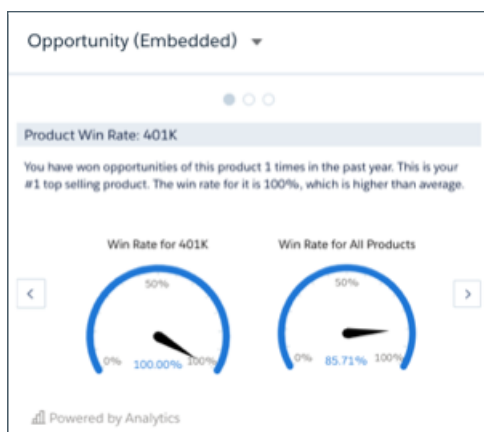
- **Current Clients.** Shows key client metrics, such as number of clients, households, balances, and AUM, for the current and previous month. Also displays clients with the largest and smallest AUM change over the past seven days.
- **Growing My Business.** Shows you the number of open leads/referrals and helps you determine if you can make your quarterly sales numbers.

Financial Account. Shows an account's history and assets under management, total financial assets, and client net worth. Intended for access through a financial accounts record page.

Goal. Shows a client's progress toward a financial goal, for example saving for college education or retirement. Includes the target amount, percent completion, and elapsed time. Intended for access through a financial goals record page.

Lead & Referral. Intended for access through a lead or referral record page. Includes a carousel with four cards.

- **Lead Source.** Shows your success converting leads from a particular source. Includes the source of the lead and the percentage completion rate of leads from that source. Also shows comparison to your average conversion rate for leads from all sources.
- **Product Interest.** Shows your success converting leads for a particular product.
- **Is this lead/referral receiving enough attention?** Shows length of time a lead has been open and activities for the lead compared with activities for all leads.
- **Is this lead/referral progressing as expected?** Indicates whether a lead is ahead of or behind the overall conversion rate for all leads from the source.



Opportunity. Intended for access through a product record page. Includes a carousel with three cards.

- **Product Win Rate.** Helps you gauge the opportunity for selling the product. Shows the win rate for a product in comparison to the win rate for all your products. Also tells you the rank for that product's win rate compared to all your products. (Shown for a 401 K.)
- **Total Closed Business.** Shows closed business for the product.
- **Opportunity Progress: Age in Stage.** Shows the progress of the opportunity through stages in your selling process.

Intended for access through a product record page.

[Use the My Book of Business Dashboard](#)

Financial advisers: Start with an overview of your financial book of business and how it has changed over time. Get alerts about changes compared to last month, quarter, and year. And dig deeper to see which of your products are used the most, deposits and withdrawals over time, and earnings by product and over time.

[Use the My Clients Dashboard](#)

Financial advisors can use this dashboard to identify clients for appropriate action based on recency of interactions with them, attrition risk, or portfolio value. Start by viewing client activities that indicate they need attention from you. Then dig deeper to see your top clients, profile your client population, and see if clients are reaching their financial goals.

[Use the Client Acquisition Dashboard](#)

Target high-opportunity leads for immediate action and get insights into leads/referral sources, conversion rates, and trending.

[Use the Client Interactions Dashboard](#)

Financial advisors: Make sure you're taking the actions that retain clients by getting instant insight into the results of your client management activities. Learn how you're spending time, see who's overdue for attention, and understand which activities have the most positive results. Use the dashboard's KPIs to identify clients who may need immediate action from you to keep them loyal and satisfied.

[Use the Events and Seminars Dashboard](#)

Understand the impact of events and seminars on your business. Metrics across the top show top-level numbers for your events, including average conversion rate and cost per conversion for event attendees and average attendance rate.

[Use the My Households Dashboard](#)

Identify households for appropriate action based on portfolio value. Start by viewing households by their wallet share and the length of time they've worked with you. Dig deeper to view households sorted by their AUM category and size. Not all metrics from accounts roll up to the household level, so the dashboard shows separate pages for top households and demographics.

[Use the Sales Performance Dashboard](#)

Visualize progress toward sales goals over time. Start by learning which opportunities could use your attention to move them along the sales process. Then get insight into whether you're going to be able to make your quota and evaluate your pipeline to learn about opportunities you can accelerate. Finally evaluate ways to turn more opportunities into wins.

[Use the Team Book of Business Dashboard](#)

Provides a team view of the book of business. Start with a top-level view of total and per-client/per-advisor average assets under management (AUM), value of accounts, number of clients, and average wallet share. Filter by city, state, and advisor to refine your view. Then dive into details in the dashboard's pages.

[Use Wealth Management Customer Churn Prediction Dashboards](#)

Identify and take steps to retain customers who are likely to churn. View details of customers whose churn scores indicate the need for your attention. Prioritize customers who need your immediate attention by profiling the customers.

[Use the Customer Likelihood of Adding Assets Dashboard](#)

Identify customers who are likely to add assets and take appropriate action. View prediction results for each prediction score group. You can embed the dashboard in Lightning record pages.

[Analytics for Wealth Management Dashboard Glossary](#)

Learn the contents and use of metrics, filters, and other common dashboard elements. Keep this glossary open in a separate window as you use the dashboards.

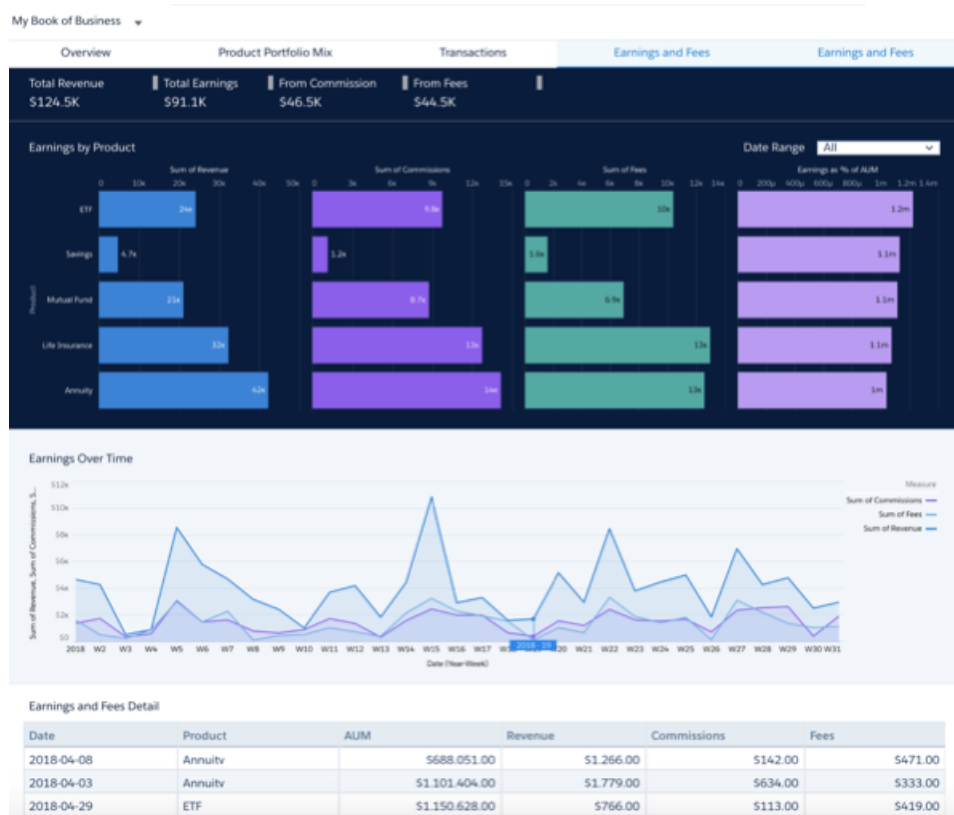
SEE ALSO:

[Consumer Banking Starter Analytics Template](#)[CRM Analytics Limitations](#)

Use the My Book of Business Dashboard

Financial advisers: Start with an overview of your financial book of business and how it has changed over time. Get alerts about changes compared to last month, quarter, and year. And dig deeper to see which of your products are used the most, deposits and withdrawals over time, and earnings by product and over time.

Note: For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Overview Page

The dashboard opens to the Overview page, which shows metrics that help you evaluate the condition of your book of business. Select one of the key performance indicators (KPIs) on the left (**#Clients**, **Total Financial Accounts**, and so on) to trend it over a selected period. Scroll down to see **AUM vs. Held Away** and **Client Segmentation**, and to learn which are your top clients and households. Then click **View Trend** to see the trend for that metric in chart to the right. Here's how to use other charts:

- **Clients Trend** chart to the right. Select a date range for the trend or select **W**, **M**, or **Q** to view trend by week, month, or quarter.
- **Client Segmentation** chart. Defaults to number of clients. Select **Total \$** to view by sum of balances for selected clients. Select **Avg \$** to view by average sum of balances for selected clients.
- **Who are my top clients and households?** chart. Defaults to show **AUM** (assets under management). Change the filter selection to view by another KPI, such as **Held Away** and **Wallet Share**.

Product Portfolio Mix Page

Provides insight into which products give you opportunities to boost sales, based on current and historic mix. Click a **Product Family** or **Product** bar in the chart on top to view metrics for just that part of your product mix. Defaults to **Total \$**, which shows the sum of balances for selected clients. Select **Avg \$** to view by average sum of balances for selected clients. Select **#** to view by number of clients.


The **Product Mix Over Time** chart defaults to showing your product mix for all time. You can change that to a specific time period by changing the **Date Range** filter.

Transactions Page

View your portfolio inflow and outflow according to selections in the filters along the top. Defaults to showing the past 12 weeks. Click **M** to view by month, **Q** to view by quarter. Also, see which clients have made large deposits and withdrawals. Select a transaction type to focus on credits or debits, or change the date range to view changes during a specific time period. The page also shows the following.

- Top section
 - **Total Deposits.** Sum of client deposit amounts.
 - **Total Withdrawals.** Sum of client withdrawal amounts.
 - **Net.** Total deposits - total withdrawals.
- **Clients with Large Deposits and Withdrawals** chart. Defaults to sorting from large to small withdrawals. Select **Deposits** to sort from large to small deposits.

Earnings and Fees Page

 **Note:** The charts on this page visualize data about fees and commissions from an external .CSV data file. If the dashboard doesn't render, consult your Salesforce administrator.

See revenues, commissions, fees, and earnings as percentage of AUM for the entire organization or a selected advisor, according to selections from filters along top. Defaults to all time. Zero in on a specific time period by changing the **Date Range** filter. Charts show the following:


- **Earnings by Product** chart. Shows revenue, commissions, fees, and earnings as percent of AUM for all your financial products.
- **Earnings Over Time** chart. Shows earnings over time. Defaults to 31 weeks. Focus on a time period by changing selection in **Date Range** filter in the **Earnings by Product** chart.

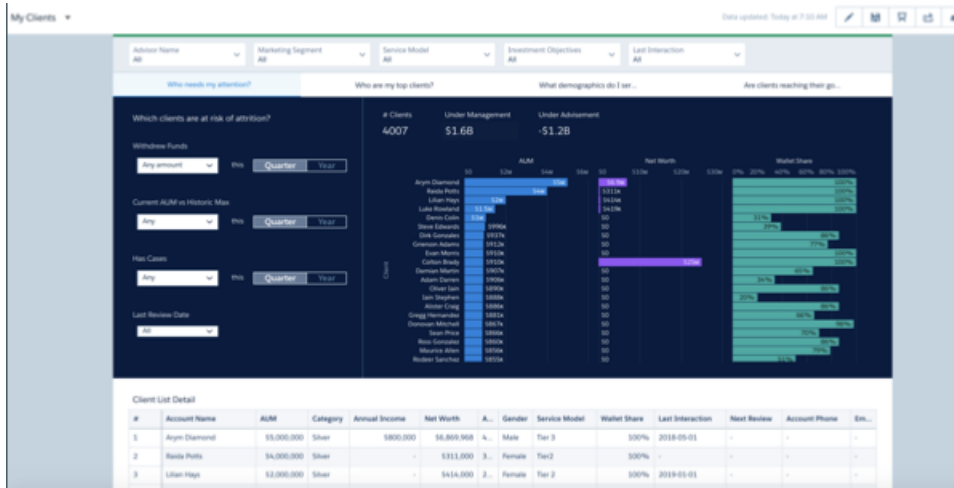
SEE ALSO:

[Import Earnings and Fees Data to CRM Analytics for Financial Services Apps](#)

Use the My Clients Dashboard

Financial advisors can use this dashboard to identify clients for appropriate action based on recency of interactions with them, attrition risk, or portfolio value. Start by viewing client activities that indicate they need attention from you. Then dig deeper to see your top clients, profile your client population, and see if clients are reaching their financial goals.

 **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Who Needs My Attention? Page

The dashboard opens to this page, which lets you single out clients at risk of possible attrition or who may need extra attention. Set the filters at left to see clients with large withdrawals or historically low AUM (because of market losses). Also quickly learn about clients who've logged support cases or whose accounts you haven't reviewed in a while. View the results by quarter or by year.

In the chart on the right, click any bar to view details for a client in the **Client List Detail** table below.

Who Are My Top Clients? Page

Organizes specific clients based on their wallet share and length of relationship with the company to help you prioritize who should receive your attention. Select **Top 50**, **Top 100**, or **All** to change the selection. Click a bubble in the chart to see details about the client in the table below.

What Demographics Do I Serve? Page

Profiles typical client and high-net-worth clients. Categorizes clients by net worth, length of relationship, geography, and other criteria. In either the top or bottom chart groups, select **#** to view by number of clients or **\$** to view by asset totals. Click a chart element (bar, map, circle segment) to view details in the table below.

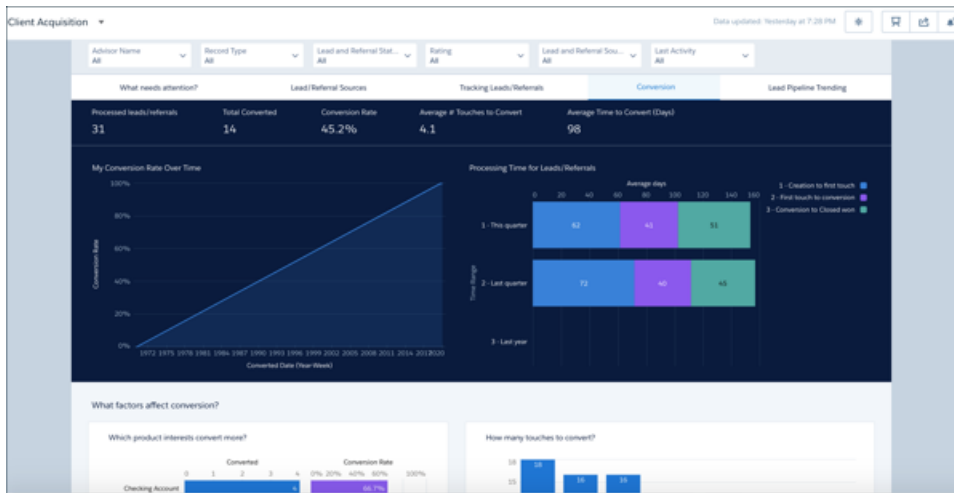
Are Clients Reaching Their Goals? Page

Identify clients who may need help progressing toward their financial goals. Shows progress toward goals by client type, percent completion of goals, and size of goals. Change **Filter by % Complete** selection to sort clients according to how far along they are in achieving their goals. Change **Years Until Target** selection to sort by how long they have until they reach their goals. Click a bar or bubble to view details in the table below.

Use the Client Acquisition Dashboard

Target high-opportunity leads for immediate action and get insights into leads/referral sources, conversion rates, and trending.

 **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Adjust the **Rating** and **Lead and Referral Status** filters at the top to zero in on your hottest leads. Change the time period for the **Last Activity** filter to get more precise information about how your team is working with leads to close them.

What Needs Attention? Page

Opens to the What Needs Attention? page, which helps identify leads that have stalled or have had no activity for immediate action. Click an element in the **Who should I call today?** chart and view leads in that category in the **Leads and Referrals Details** table below. For example, click the bar for the highest amount in **By Expected Value** to view just the potentially most valuable leads in the details table. Then help move the lead along by rolling the cursor over a name, clicking the disclosure triangle, and selecting an action (**New Task**, **New Event**, **Log a Call**, and so on).

Lead/Referral Sources Page

Combines metrics about lead referral sources and your best referrers to help you identify the best opportunities. Click a section of the **Where do leads/referrals come from?** chart to view best referrers for that source in **Who are my best referrers?**. Or click a bar in **Who are my best referrers?** to see sources for that referrers leads in **Where do leads/referrals come from?**. Scroll down to get specifics for each lead in the details table.

Tracking Leads/Referrals Page

See what's happened to leads and how far they've proceeded if they haven't converted yet. Click a bar in **Select a created date** and then view status of leads from that period in **Where are these leads now?**. Or click an element in **Where are these leads now?** to see when leads in that status were created. To expand the time period, select **M** (month) or **Q** (quarter).

Conversion Page

Shown above. Follow the lead conversion process for your team. Chart at top-left shows your conversion rate over time. Top-right chart shows the average days leads spend in stages of the conversion process, for example **Creation to first touch**. Charts below show

products with most successful conversion rates and the effect of the number of touches on conversion. Click a bar for a product to see the number of touches for conversions for that product. To learn about products that take the fewest or most touches to convert, click a bar in **How many touches to convert?** and view results for each product in **Which product interests convert more?**

Lead Pipeline Trending Page


Choose a start and end date to trend data about leads between those two dates. The waterfall chart depicts the flow of leads in and out of the pipe during the period you select.

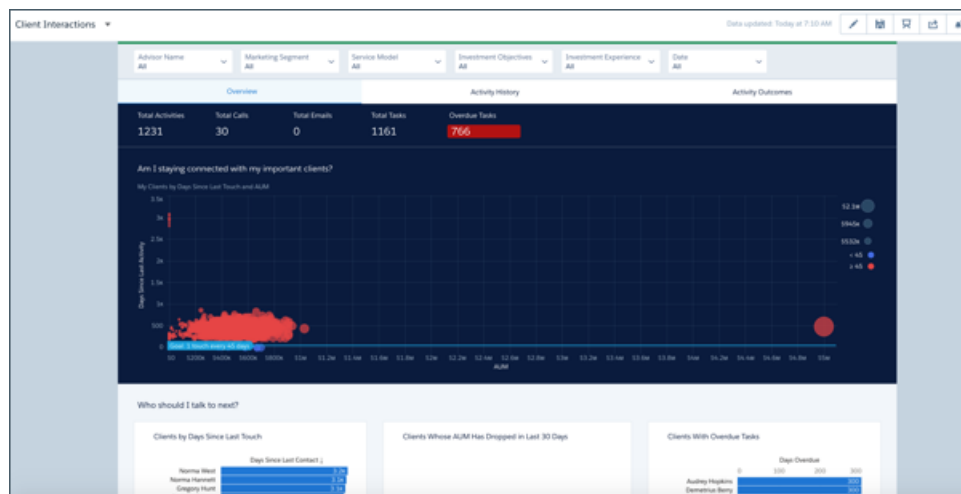
Metrics for Waterfall Chart

- **# Start.** Number of open leads as of selected start date.
- **# New Leads.** Number of leads created between selected start and end dates.
- **# Converted.** Number of leads converted between selected start and end dates.
- **# Disqualified.** Number of leads disqualified between selected start and end dates.
- **# End.** Number of open leads as of selected end date.

Use the Client Interactions Dashboard

Financial advisors: Make sure you're taking the actions that retain clients by getting instant insight into the results of your client management activities. Learn how you're spending time, see who's overdue for attention, and understand which activities have the most positive results. Use the dashboard's KPIs to identify clients who may need immediate action from you to keep them loyal and satisfied.

-  **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Overview Page

Shows clients that may have been neglected and their importance according to AUM or other metrics. Also shows days since last contact with clients, clients whose AUM has dropped, and clients with overdue tasks. Click a bubble representing a client in the top chart to learn if they're due immediate attention and for details to use when you contact them.

Activity History Page


Shows how an advisor has spent time according to activity type and time period. Chart on the left shows tasks according to type, chart on the right total tasks by date. Select **W** to view activities by week, **M** to view by month, and **Q** to view by quarter. Click a bar to view details about the task type or period in the table below.

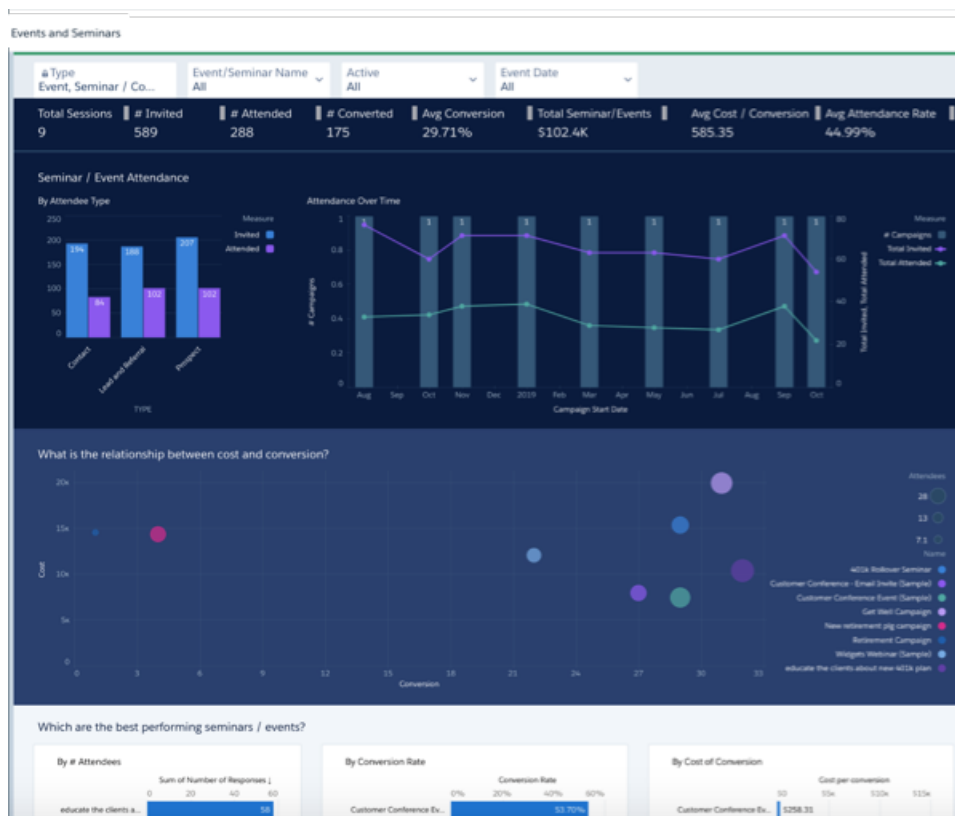
Activity Outcomes Page

Learn the results of your activities. Click a bar for a time frame to see clients that you met that period. Then view the impact of your activities on those clients' AUM, wallet share, assets under advisement, and deposits. Select **W** to view outcomes by week, **M** to view by month, and **Q** to view by quarter. Charts below compare outcomes to the average for all clients. Change toggle to **Top 20** to compare outcomes to average for your top clients.

Use the Events and Seminars Dashboard

Understand the impact of events and seminars on your business. Metrics across the top show top-level numbers for your events, including average conversion rate and cost per conversion for event attendees and average attendance rate.

 **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Change filter selections at top to view a segment of event attendees.


Click an **Attendee Type** bar in **Seminar/Event Attendance** to see the attendance over time for that type in the chart on the right. Then scroll down to the details tables at the bottom to see details for the events and invitees for that type.

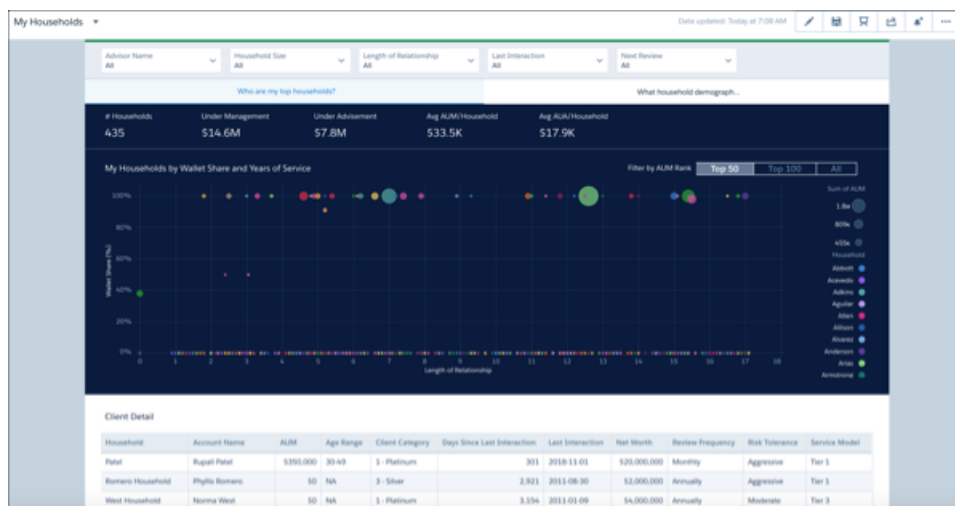
Chart in the middle shows the relationship between the cost of an event and conversion rate of attendees for the types of events you hold. Select a bubble for the event type to see the impact of cost for that type of event on conversion. The details tables at the bottom then show details for only that event type.

Charts below that show your best performing events according to the number of attendees, conversion rate, and cost of conversion. Click a bar for an event type in any of the three charts and the other two charts also show only results for that type. Details tables at the bottom also show events and attendees for only the selected type.

Use the My Households Dashboard

Identify households for appropriate action based on portfolio value. Start by viewing households by their wallet share and the length of time they've worked with you. Dig deeper to view households sorted by their AUM category and size. Not all metrics from accounts roll up to the household level, so the dashboard shows separate pages for top households and demographics.

 **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Who Are My Top Households? Page


The dashboard opens to this page, which organizes households based on their wallet share and length of relationship with the company. The visualization helps you prioritize who should receive your attention. Select Top 50, Top 100, or All to view clients in those categories. Click a bubble in the chart to see details about the client in the table below.

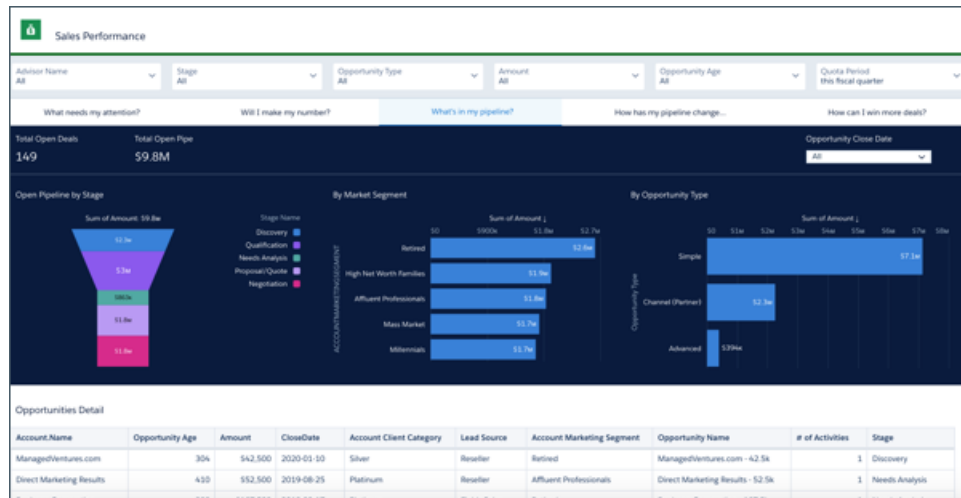
What Household Demographics Do I Serve? Page

Profiles your households according to their AUM and size. Click a bar to view details about households with that profile in the table below.

Use the Sales Performance Dashboard

Visualize progress toward sales goals over time. Start by learning which opportunities could use your attention to move them along the sales process. Then get insight into whether you're going to be able to make your quota and evaluate your pipeline to learn about opportunities you can accelerate. Finally evaluate ways to turn more pipeline opportunities into wins.

 **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



To view the performance of individual advisors, select a team member from the **Advisor Name** global filter at the top. You can also view performance by stage, opportunity type and age, opportunity amount, and time period. Global filter selections persist across all the dashboard's pages.

What Needs My Attention? Page

The dashboard opens to the What Needs My Attention? Page, which highlights high-value opportunities that require immediate action from the team. Shows opportunities that have stayed in a stage longer than the average for the stage, and those where there's no recent activity. Click an element of one of the top two charts to get the specifics about opportunities in that category in the Opportunities Details table at the bottom.

Will I Make My Number? Page

Shows your team's progress toward quota, including your target and the number of business days left in the period. View quarter-over-quarter and year-over-year historic comparisons. Roll cursor over a chart element for details for that date, and scroll down to Opportunities Detail chart to see specifics for all open opportunities.

What's in My Pipeline? Page

Shown above. To help you zero in on high-opportunity segments of the pipeline, shows open pipe by stage, market segment, and opportunity type. Also shows total open pipe and open deals. Click an element in a chart at the top to see details about opportunities in the table below.

How Has My Pipeline Changed? Page

Trends your pipeline, showing how it has changed between two dates (for example, quarter to date) for opportunities forecast to close within a specific time period. Change the **Pipeline Start and End Date** filter to view deals for a preset period (year, quarter, month, and so on), or select a custom period.

Metrics for Waterfall Chart


- **Start.** Value (\$) of opportunities open at the start of selected period.
- **New.** Value (\$) of opportunities created during selected period.
- **Reopen.** Value (\$) of opportunities reopened during selected period.
- **Expanded.** Total increase in value (\$) of open opportunities whose value has increased and are scheduled to close during selected period.
- **Moved In.** Value (\$) of opportunities with close dates that shifted to close during selected period.
- **Moved Out.** Value (\$) of opportunities with close dates originally within selected period that shifted out of selected period.
- **Reduce.** Total decrease in value (\$) of open opportunities whose value has decreased and are scheduled to close during selected period.
- **Closed Won.** Value (\$) of opportunities that are closed and won during selected period.
- **Closed Lost.** Value (\$) of opportunities that are closed and lost during selected period.
- **Today.** Value (\$) of opportunities open today or at end of selected period.

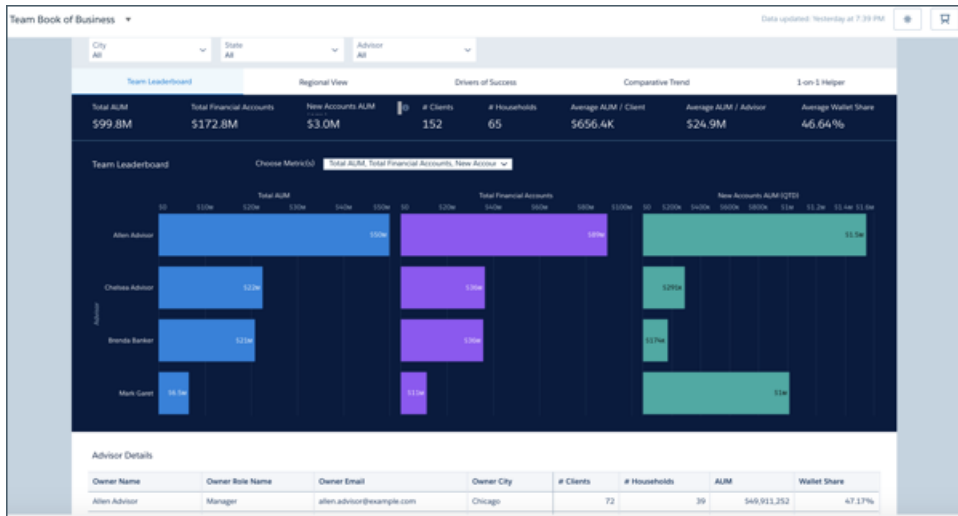
How Can I Win More Deals? Page

Visualizations help you understand how to win more deals. Top charts compare won and lost opportunities and show your team's win rate over time. Use **Understanding Win Rate** chart below to help understand what drives your win rate. Change the two selections in the chart to see what factors combine to increase or decrease win rate. Click a bubble in **Win Rate Mix** and view results for that combination in **Deals Won/Lost**. For example, the combination of the a specific market segment (millennials, retirees, high net worth, and so on) and an opportunity type (such as simple or complex) may result in a higher win rate. Look for opportunities with that combination to increase your win rate.

Use the Team Book of Business Dashboard

Provides a team view of the book of business. Start with a top-level view of total and per-client/per-advisor average assets under management (AUM), value of accounts, number of clients, and average wallet share. Filter by city, state, and advisor to refine your view. Then dive into details in the dashboard's pages.

-  **Note:** For metrics definitions for this and other Analytics for Wealth Management dashboards, see the [Analytics for Wealth Management Dashboard Glossary](#). The glossary also defines the contents and use of global filters that appear along the top of dashboards, most of which appear in multiple dashboards.



Team Leaderboard Page

Opens to the **Team Leaderboard** page and its leaderboard. Defaults to ranking members of your team by total AUM, total financial accounts, and new AUM. View other metrics by making selections in the **Choose Metric(s)** filter. View details about each advisor in the table below the leaderboard.

Metrics in **Choose Metric(s)** filter

- **Total AUM.** Total of assets under management.
- **Total Financial Accounts.** Sum of financial accounts for households.
- **New Accounts AUM (QTD).** Total of assets under management for accounts opened in current quarter.
- **Total AUA.** Total assets under advisement.
- **# Clients.** Total number of clients.
- **# Households.** Total number of households.
- **Average AUM/Client.** Sum of AUM / Number of clients.
- **Average AUM/Household.** Sum of AUM / Number of households.
- **Average Wallet Share.** Average wallet share

Regional View Page

Ranks performance by state and city. Defaults to measuring performance according to AUM. Use the **Choose Metric** filter to view performance according to other metrics. Click an element from either the **By State** or **Top Cities** charts to view details about advisors in those locales.

Drivers of Success Page

View correlations between various factors and performance. Use the filters at the top to select metrics for an activity, lead/referral, or opportunity, a time period, and a KPI. Chart then shows you how the activity, lead/referral/ or opportunity metric influences the selected KPI for that time.

Metrics in first **Explore the relationship between filter**

- **Activity: # Activities.** Count of activities.
- **Activity: # Meetings.** Count of meetings.
- **Activity: # Emails.** Count of emails.
- **Activity: # Calls.** Count of calls.
- **Lead/Referral: Average Days Until First Touch.** Days between date of creation of lead and date of first activity.
- **Lead/Referral: Average # Touches.** Average touches per lead.
- **Lead/Referral: Average Days Until Conversion.** Average number of days between date of creation and date of conversion.
- **Lead/Referral: Conversion Rate.** Converted leads / Total leads.
- **Opportunity: # of Opportunities Created.** Count of opportunities.
- **Opportunity: # of Opportunities Closed Won.** Count of opportunities with status of Closed Won.
- **Opportunity: Win Rate.** Opportunities with status of Close Won / Opportunities
- **Opportunity: Average Days Until Closed Won.** Average of the opportunity age for opportunities with status of Closed Won.
- **Client: Average # of Goals Per Client.** Count of goals / Number of clients.
- **Client: Average # of Financial Accounts.** Count of financial accounts / Number of clients.

Comparative Trend Page


Click a bar for advisors in the left-hand chart to view their performance over time in the right chart. Defaults to showing weekly performance according to AUM. Change the selection in the **Choose Metric** filter to view performance by other metrics. Change the period for the trend with the **Date Range** filter, or change the time segment from weekly to monthly by clicking **M** or **Q**.

1-on-1 Helper Page

Provides performance metrics and rankings for advisors on your team to help you get ready to coach them. Select an advisor from the menu at top-center or click a bar next to their name in a chart to view KPIs for the advisor. KPIs include AUM, total value of financial accounts, average wallet share, referral conversion rate, and more.

Use Wealth Management Customer Churn Prediction Dashboards

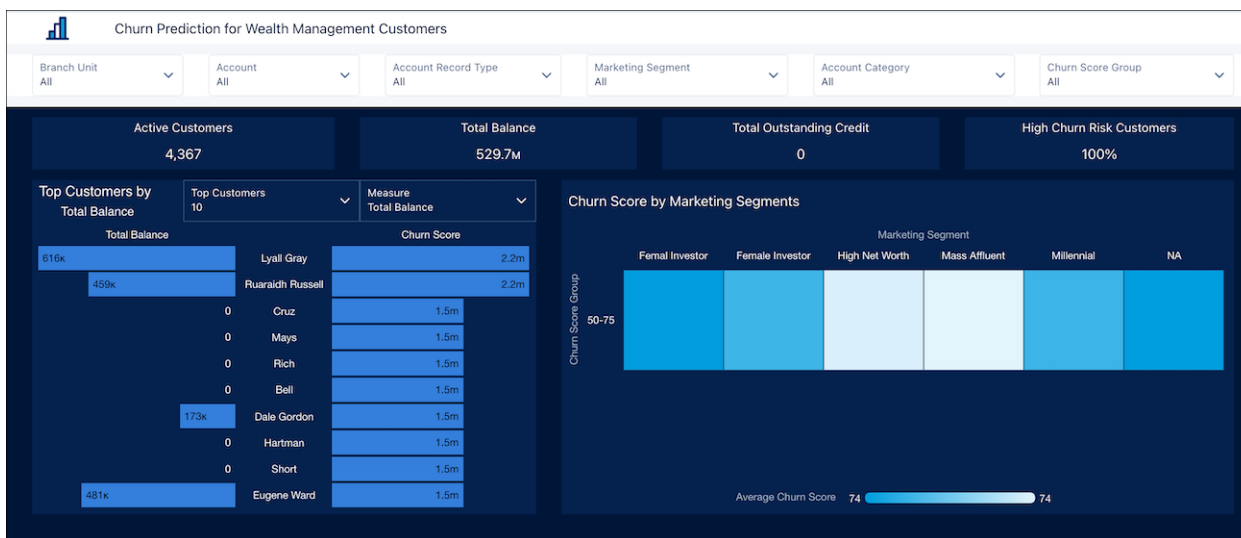
Identify and take steps to retain customers who are likely to churn. View details of customers whose churn scores indicate the need for your attention. Prioritize customers who need your immediate attention by profiling the customers.

-  **Note:** For metric definitions of Analytics for Wealth Management dashboards, see [Analytics for Wealth Management Dashboard Glossary](#). The glossary also describes the contents and the use of global filters present on the dashboards.

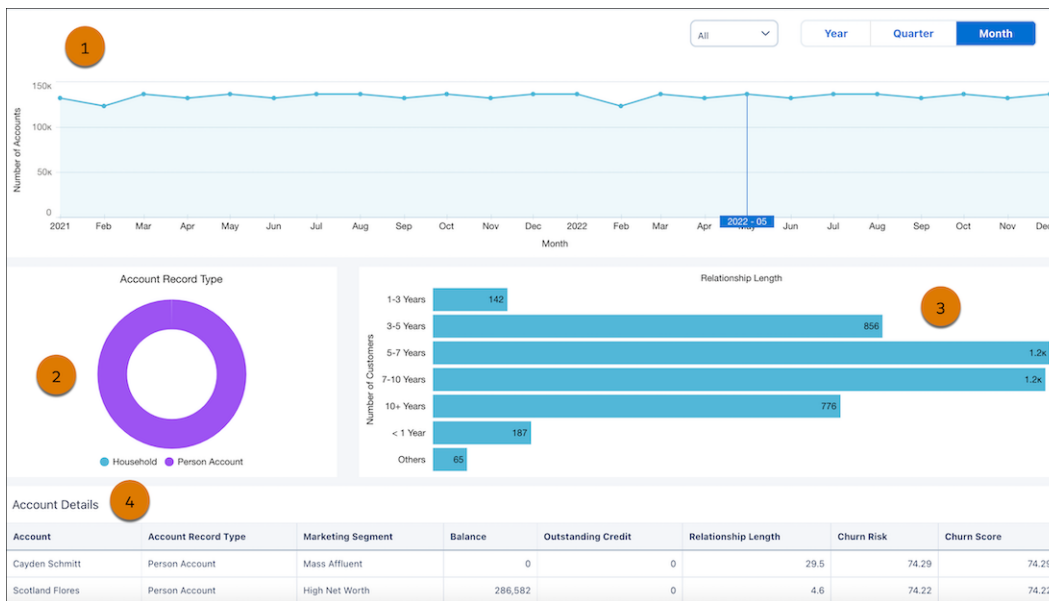
EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

The Churn Prediction for Wealth Management Customers Dashboard



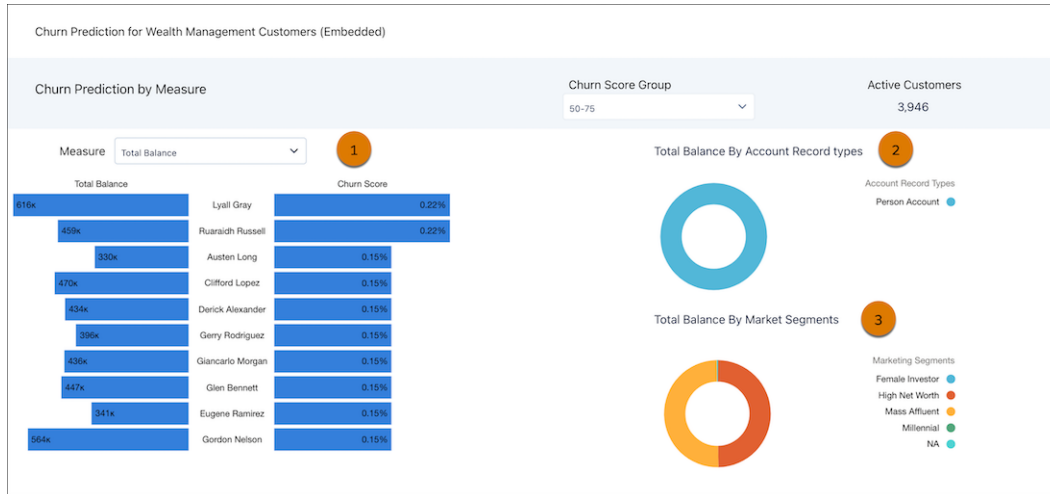
See predicted churn details of Wealth Management customers. Set filters to see customers who are at risk of churn for each branch unit, account, account record type, marketing segment, and account category. View prediction results for each churn score group. Quickly learn about top customers, customers with low balances, or customers with high outstanding credits who are likely to churn.



- The chart (1) shows yearly, quarterly, or monthly analysis of existing accounts.
- The chart (2) shows accounts based on record type. Use the chart to prioritize the type of accounts that need your attention. To see details of a record type in the next chart, click a sector in the chart.
- The chart (3) shows accounts based on the length of the account's relationship with the company. Use the chart to prioritize customers who need your attention.
- The table (4) shows customer details.

The Churn Prediction for Wealth Management Banking Customers (Embedded) Dashboard

See predicted churn details of Wealth Management customers. Set filters to see customers with low balances or high outstanding credits who are likely to churn. View prediction results for each churn score group. The dashboard can be embedded on Lightning record pages.



- The chart (1) shows churn scores based on account balance or outstanding credit.
- The chart (2) shows accounts based on record type. Use the chart to prioritize the type of accounts that need your attention.
- The chart (3) shows accounts based on marketing segment. Use the chart to prioritize marketing segments that need your attention.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Reduce Churn of Wealth Management Customers](#)

Use the Customer Likelihood of Adding Assets Dashboard

Identify customers who are likely to add assets and take appropriate action. View prediction results for each prediction score group. You can embed the dashboard in Lightning record pages.

- **Note:** For metric definitions of Analytics for Wealth Management dashboards, see [Analytics for Wealth Management Dashboard Glossary](#). The glossary also describes the contents and the use of global filters present on the dashboards.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license



- The chart (1) shows a list of accounts with the account's prediction scores and assets under management.
- The chart (2) shows the wallet shares of accounts based on prediction score group. Use the chart to prioritize the accounts that need your attention.
- The chart (3) shows the wallet shares of accounts based on marketing segments. Use the chart to prioritize marketing segments that need your attention.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Increase Your Assets Under Management from Wealth Management Customers](#)

Analytics for Wealth Management Dashboard Glossary

Learn the contents and use of metrics, filters, and other common dashboard elements. Keep this glossary open in a separate window as you use the dashboards.

Note: Partial listing. Includes metrics for the following dashboards:

- Client Acquisition
- Client Interactions
- My Book of Business
- My Clients
- My Households
- Sales Performance

Last update: November 7, 2019.

Global Filters

A subset of these filters appears across the top of the app's dashboards depending on the dashboard's contents. They're listed alphabetically here. Select one, many, or all values in each filter. The selection changes metrics across all parts of the dashboard you're currently viewing.

Revert to default values by clicking the Return to Initial View icon to the right of the dashboard name.

Account Name. Select the accounts you'd like to analyze.

Active. Select whether the event(s) you view are active or not.

Advisor Name. Shows the name of the current user of the app. For managers of advisors, this filter shows names of advisors they manage. For advisors, selection is locked to themselves.

Amount. Set the range for deal amounts.

Date. Set a date range for client data.

Event Date. Set period for events to view.

Household Size. Set the range for the size of households you'd like to view.

Investment Experience. Select clients by how experienced they are as investors.

Investment Objectives. Select clients by their investment objectives.

Last Activity. Set period for lead's last activity to view only leads with activities during that time.

Last Interaction. Set period for client's last interaction to view only clients with interactions during that time.

Lead and Referral Source. Select the sources for leads.

Lead and Referral Status. Select status of leads in the closing process.

Length of Relationship. Set the range of time households have worked with you to view only households during that time.

Marketing Segment. Values from Marketing Segment field in Account object.

Next Review. Set period for next scheduled review to view only households set for review during that time.

Opportunity Age. Set the range for age of opportunities.

Opportunity Type. Select types of opportunities.

Rating. Select lead rating.

Record Type. Select a lead type.

Seminar/Event Name. Select the seminars or events to view.

Service Model. Select clients according to their service model.

Stage. Select stages in the opportunity closing process.

Type (Events and Seminars). Select the types of seminars or events type to view.

Metrics Glossary

Metrics for the CRM Analytics for Financial Services app appear in one or many dashboards, depending on the dashboards' contents. They are listed alphabetically here.

A-E

Attainment (quota). $(\text{Total amount of closed won opportunities} / \text{My quota}) * 100$

Attended. Count of invitees to events defined by filter selections who responded to invitations.

Average Time to Convert (Days). Average of days between creation and conversion dates for converted leads with status of **Qualified**.

Average # Touches to Convert. Average of activities to convert for converted leads with status of **Qualified**.

Avg Accounts/Client. Average number of accounts held by each client.

Avg Attendance Rate. Number of attended / Number of invited defined by filter selections.

Avg AUA/Household. Assets under advisement (AUA) / #Households.

Avg AUM/Household. Assets under management (AUM) / #Households

Avg Conversion Rate. Number of converted / Number of attendees to events defined by filter selections.

Avg Cost / Conversion. Number of converted / Total seminar/event costs defined by filter selections.

Avg Products/Client. Average number of products used by each client.

Business Days Left. Number of days in quarter - Completed days in quarter.

#Clients. Number of clients based on selections in filters along top.

\$ Closed Lost. Sum of amount of closed opportunities that have been lost.

\$ Closed Won. Sum of amount of closed opportunities that have been won.

Closed Lost. Sum of number of closed opportunities that have been lost.

Closed Won. Sum of number of closed opportunities that have been won.

Conversion Rate. Converted leads / processed leads.

Converted. Sum of won opportunities among attendees to events defined by filter selections.

Days Since Last Activity. Number of days between last activity and today.

Days > Historical Average. Number of days greater than the historical average for the stage that the opportunity has stayed in that stage.

Deals with Age > Avg in Stage. Count of open opportunities with age greater than historical average in stage.

E-J

Expected Revenue. Amount of revenue from closed won opportunities plus revenue from open opportunities where probability of winning is at least 90% probability.

External Referrers. Number of leads marked **Referred by Contact**.

of Financial Accounts. Number of households based on selections in filters along top.

From Commission. Sum of commissions from clients.

From Fees. Sum of fees from clients.

Held Away. Sum of Held Away for selected accounts.

#Households. Number of households based on selections in filters along top.

Internal Referrers. Number of leads marked **Referred by User**.

Invited. Count of invitees to events defined by filter selections.

K-P

My Quota. Sum of quota amount.

No Activity Last 30 Days. Count of open opportunities with no activities for 30 days.

Open Deals. Count of open opportunities.

Open Leads/Referrals. Count of leads with status other than **Closed–Not Converted** or **Qualified**.

Overdue Tasks. Count of tasks that have not been completed. Data drawn from Task or Event objects where record is set to `type=task` and days between start of task and today is greater than 0. Excludes Household record types.

Processed Leads/Referrals. Count of leads with status of **Closed–Not Converted** or **Qualified**.

Q-Z

Total Activities. Count of activities. Data drawn from households with Task or Event objects. Excludes Household record types.

Total Calls. Count of calls. Data drawn from Task or Event objects where record is set to `type=call`. Excludes Household record types.

Total Closed Deals. Count of closed opportunities.

Total Closed Won. Sum of amounts of closed won opportunities.

Total Converted. Count of converted leads with status of **Qualified**.

Total Disqualified. Count of leads with status of **Closed–Not Converted**.

Total Earnings. Sum of commissions from clients + Sum of fees from clients.

Total Emails. Count of emails. Data drawn from Task or Event objects where record is set to `type=email`. Excludes Household record types.

Total Financial Accounts (My Book of Business). Sum of Balance field for clients selected using filters on top.

Total Leads/Referrals. Count of leads.

Total Open Deals. Sum of number of open opportunities.

Total Open Pipe. Sum of amount of open opportunities.

#Total Products. Number of financial account types based on filter selections.

Total Revenue. Sum of revenue from clients.

Total Seminar/Events Cost. Sum of actual cost of events defined by filter selections.

Total Sessions. Count of events defined by filter selections.

Total Tasks. Count of tasks. Data drawn from households with Task or Event objects where record is set to `type=task`.

Under Advisement. Sum of Assets Under Advisement (AUA) for selected accounts.

Under Management. Sum of Assets Under Management (AUM) for selected clients.

Wallet Share. Sum of AUM for selected clients / (Sum of AUM for selected clients + Sum of Held Away for selected client).

Win Rate. Value (\$) of closed opportunities that have been won / Value (\$) of all closed opportunities.

With Activity in 30 Days. Count of leads with status other than **Closed–Not Converted** or **Qualified** and with an activity in the last 30 days.

Use CRM Analytics for Insurance


The insurance-specific analytics for Financial Services Cloud (FSC), a comprehensive set of CRM Analytics dashboards, offers insurance executives and managers insights into their book of business and identifies opportunities to improve sales.

The CRM Analytics templates are:

- For FSC Insurance:
 - Analytics for Insurance template
 - Einstein Discovery for Insurance Analytics template
 - FSC Insurance Analytics Fast Start template
- For FSC Vlocity Insurance:
 - Insurance Claims and Policy Analytics template
 - Policy Renewal Prediction template

Analytics for Insurance

The Analytics for Insurance app gives agents and managers insights on their sales performance, team's performance, leads and opportunities. Agents can grow written premiums by using app dashboards to segment the customer base and get insights on upsell/cross-sell opportunities.

 **Note:** Available at an extra cost for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license.

For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#)

For more information on Analytics for Insurance dashboards, see [Use Analytics for Insurance](#).

Einstein Discovery for Insurance Analytics


The Einstein Discovery for Insurance Analytics app gives smart insights on the likelihood of policy renewals.

You can create and use Einstein Discovery for Insurance Analytics App only if the Financial Services Cloud managed package is installed in Salesforce. For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#).

For more information on Einstein Discovery for Insurance Analytics app, see [Einstein Discovery for Insurance Analytics Dashboards](#).

FSC Insurance Analytics Fast Start

The FSC Insurance Analytics Fast Start app gives the Financial Services Cloud customers a quick way to apply the power of CRM Analytics to the data in their Book of Business. Use the FSC Insurance Analytics Fast Start dashboards to analyze the Book of Business and identify cross-sell opportunities in the existing customer base.


 **Note:** Available at an extra cost for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license.

For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#)

For more information on FSC Insurance Analytics Fast Start dashboards, see [Use FSC Insurance Analytics Fast Start](#).

Insurance Claims and Policy Analytics

Insurance Claims and Policy Analytics app gives you actionable insights to effectively manage your claims, quotes, and policies.


 **Note:** Available at an extra charge for Vlocity customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license.

Insurance Claims and Policy Analytics app is available only to Vlocity users. To give integration users access to all the fields that are used in the Insurance Claims and Policy Analytics app, assign the integration user with the Vlocity Insurance license. For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#).

For more information on Insurance Claims and Policy Analytics dashboards, see [Use Insurance Claims and Policy Analytics](#).

Policy Renewal Prediction

The Policy Renewal Prediction app gives you smart insights on the likelihood of policy renewals. With the dashboards, you can identify the policies that need attention and devise strategies to retain customers.

 **Note:** Available at an extra charge for Vlocity customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license.

Policy Renewal Prediction app is available only to Vlocity users. To give the integration users access to all the fields used in the Policy Renewal Prediction app, assign the integration user with the Vlocity Insurance license. For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#).

For more information on Policy Renewal Prediction dashboards, see [Use Policy Renewal Prediction](#) on page 102.

[Use Analytics for Insurance](#)

Analytics for Insurance dashboards give insurance agents and managers a complete customer intelligence solution.

[Use FSC Insurance Analytics Fast Start](#)


The FSC Insurance Analytics Fast Start app is a quick stop for agents and managers to get insights into their book of business and to identify opportunities to improve sales. The dashboards provide accurate insights on the historical trends of Policies and Gross Written Premium over time. The dashboards also provide insights to identify opportunities to cross-sell policies to existing customers based on KPIs such as Gross Written Premium, Policy Type, Tenure, and Life Events.

[Use Analytics for Vlocity Insurance](#)

CRM Analytics for Vlocity Insurance includes the Insurance Claims and Policy Analytics app and Policy Renewal Prediction app. Use the Insurance Claims and Policy Analytics app to get actionable insights into claims management and policy administration. With the Insurance Claims and Policy Analytics dashboards, claim handlers and producers can prioritize tasks, claims, quotes, and policies that need immediate attention to improve customer satisfaction.


Use Analytics for Insurance

Analytics for Insurance dashboards give insurance agents and managers a complete customer intelligence solution.

 **Note:** CRM Analytics for Insurance is included with CRM Analytics for Financial Services, which is available at an extra charge for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license. See [Deploy CRM Analytics for Financial Services](#) for complete deployment instructions.

The Analytics for Insurance app powers agents with practical insights on their sales performance and enables them to be more efficient in sales execution. They can grow written premiums by using app dashboards to segment the customer base and get insights on upsell/cross-sell opportunities. And the app powers managers with insights on their team's performance and what makes the top performers different to help them coach team members.

Open the app.

1. From the app picker  , select **CRM Analytics Studio** to open the CRM Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app to open it. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.

The app includes the following dashboards for agents and managers.

[Analytics for Insurance Dashboards for Agents](#)

Agents start with the **Insurance Agent Home** dashboard, which is organized into two sections, **Understand My Customers and Policies** and **Grow My Business**.

[Analytics for Insurance Agent and Sales Manager Dashboards](#)

Agent managers and sales managers each have their own set of dashboards to help manage the business and build top-performing teams.

[Analytics for Insurance Dashboards for Embedding](#)

Analytics for Insurance includes dashboards that can be embedded in Lightning Experience pages to provide detailed insights on customers, leads, and opportunities. Check with your Salesforce administrator to see if these dashboards have been embedded in your Salesforce org.

[Key Performance Indicators](#)

Learn the definitions and calculations of key metrics shown in Analytics for Insurance dashboards.

[Einstein Discovery for Insurance Analytics Dashboards](#)

The Einstein Discovery for Insurance Analytics dashboards give you intelligent insights on the likelihood of policy renewals and help you maximize renewals.

Analytics for Insurance Dashboards for Agents

Agents start with the **Insurance Agent Home** dashboard, which is organized into two sections, **Understand My Customers and Policies** and **Grow My Business**.

Click the **Open Dashboard** links beneath each summary chart to see detailed dashboards.

Understand My Customers and Policies Section

Key performance indicators (KPIs) from these dashboards paint an actionable picture of your customers and the policies you've sold to them.

My Book of Business

Make the right decisions to drive the success of your business by viewing metrics on all your customers in one set of charts. Adjust the menus at the top of the dashboard to choose a customer segment, then drill into KPIs through the following pages.

- **Overview.** See how well you've performed over time on key metrics. See if gross written premiums (GWPs), customers, and policies have grown. Also find out if customer retention, opportunity win rate, and lead conversion have improved.
- **Active Policies and Coverage.** Get all the facts about your policies. Learn about the most and least elected coverages within a policy type and how policies are distributed over policy type. Click a segment in the charts at the top to view policy details in the table at the bottom of the dashboard.
- **Policy Trending.** See how the number of policies and gross written premium have changed over a selected period. For example, discover how many new policies have been added, lapsed, or canceled.
- **Earnings and Fees.** Breaks down earnings and fees over a selected period for all your products so you can understand which of them drive the most revenue. The dashboard shows data only if your Salesforce administrator uploads external earnings and fees data to CRM Analytics.

My Customers

Understand who your customers are so you segment them and market to them more effectively. KPIs are organized into two pages.

- **Who Are My Top Customers?** See which of your customers have high profitability, high premiums, or low claims.
- **How many customers gained?** Learn if you're gaining or losing customers over time, and how many you're gaining and losing.
- **What Demographics Do I Serve?** Get a breakdown of your customers by Marketing segment, premium value group, age, gender, and location.

Customer Interactions

Shows you the best ways to interact with customers. Visualizations show how you divide time between tasks and events and if those activities involve high- or low-value customers.

Renewals & Cancellations


Insights into your policies reveal clients who are up for immediate renewal. You can also find out who's already renewed and who's canceled so you can take appropriate action. Get all the details about your policies through the following pages.

- **Policies Up for Renewal.** See policies and premium due for renewal in the next 30 days, and learn which high-value customers are due for renewal soon. Also identify policies in the grace period so you can take action to boost renewal rates.
- **Renewed Policies.** Find out your clients' renewal rates and premiums from renewed policies.

- **Canceled Policies.** Discover why customers cancel policies. Also see the value of premiums lost for specific cancellation reasons, such as the insured requesting cancellation or nonpayment.

Claims

Get a detailed picture of your claims, starting with an overview of your claims by age, size, and customers' gross written premium. Adjust the filters at the top to focus on a specific segment of your customers. Then dig deeper into claims data in the following pages.

- **Open Claims.** Click a bar for a claim number in the **Claims by Estimated Size** and **Claims by Customer Gross Written Premium** charts to focus on details for that claim. Use the visualizations to answer the following questions:
 - Which claims are open for longer than average closure time?
 - Which customers have high estimated claim amounts?
 - Which high-premium customers have open claims?
- **Claims Over Time.** Evaluate the trend of claims, claims severity, and loss ratio over time and average time to process claims.
 -  **Note:** If there's no data in the Financial Account Transaction object, you see insights based on Claims to GWP instead of Loss Ratio.
- **Claims by Demography.** Identify specific market segments, geographies, or customer demographics with higher claims,
- **Claims Acceptance.** Get answers to the following:
 - How many claims are approved versus rejected over time?
 - What is the claim approval rate based on policy type and claim amount?


Product Analysis

What are your top-selling products? Which products sell most in your market segments and locations? What products are most profitable? Get answers to these questions and more in the following pages.

- **Product Portfolio Mix.** Start here to learn the number and value of premiums distributed over all your products and learn how your product mix has changed.
- **Products and Market Segment.** Shows products that sell the best to specific marketing segments. Filter according to the segment you want to view, such as millennials, women, or high-net-worth customers.
- **Product Profitability.** Learn which products result in the highest profit. Also see average profits per product, total profits, and other KPIs about profitability.
- **Regional View.** Select states or ZIP codes to see the top products in specific locales.

Household Analysis

Get insights about households that help you effectively manage your books of business, identify high-value households, and discover opportunities to increase revenue.

- **Book of Business:** Learn how your business is doing based on various household and claims KPIs, and effectively manage your books of business.
- **My Households:** Analyze your households and identify households with high gross written premium. Also, see how your households are performing based on the policies owned, approved claim amount, profitability, and Loss Ratio.
 -  **Note:** If there's no data in the Financial Account Transaction object, you see insights based on Claims to GWP instead of Loss Ratio.
- **Cross-Sell Opportunities:** Gain insights about households based on the policies owned and discover opportunities to sell other policies to households.

Grow My Business Section

Insights to help you grow your customer base and revenue.

Sales Performance

View all your performance KPIs in a single place so you can keep sales moving in the right direction. See which opportunities need attention, learn if you're on pace to make quota, view your pipeline, and more through these detailed pages.

- **What needs my attention?** Discover opportunities that are behind schedule compared to average so you can take immediate action.
- **Will I make my number?** See how you're progressing against quota so you can make the necessary adjustments.
- **What customers am I selling to?** See your open deals with existing customers so you can focus on the ones with highest gross written premiums and potential profitability.
- **How has my pipeline changed?** View your pipeline by quarter or another time period to make sure that deals are moving according to plan.
- **What is my win rate?** Learn your win rate over time and which policy types result in faster wins. Also uncover specific market segments where you win more.

Customer Acquisition

Get new customers faster with insights that point you to leads that convert most quickly. Visualizations surface leads to call today, identify promising sources for leads, and understand the lead conversion process. KPIs are organized into the following pages. Click a segment in any of the top charts to see details in the details table below them. The **Rating** column in each details table shows which leads are hot and cold, based on the value from the Rating field in the Lead object.

- **What Needs Attention?** See who you should call right away based on the number of days since the last contact or the age or expected value of a lead.
- **Lead/Referral Sources.** Learn the sources for your leads and the most valuable lead referrers on your team.
- **Tracking Leads/Referrals.** See how far each of your leads has progressed toward conversion.
- **Conversion.** See how long it takes to convert leads to business and learn the factors that either slow or speed the process. Also see how many touches it typically takes to close a lead.
- **Lead Pipeline Trending.** Pick a start and end date and see how the lead pipeline has changed during that period.

Upsell/Cross-Sell

Identify your whitespace, that is the opportunities where you could sell more coverage or products. Dig into details about your opportunities through the following pages.

- **What Policies to Upsell Coverage?** Select a policy type to find out its upselling potential.
- **Policy List for Upsell.** Get a filtered list of policies based on one or more missing coverages.
- **What Policy Types Can I Cross-Sell?** Learn the size of opportunities for cross-selling specific policy types.
- **Customer List for Cross-Sell.** Create a list of customers that can be added to cross-selling campaigns, such as selling life insurance to customers who have automobile coverage.

Analytics for Insurance Agent and Sales Manager Dashboards

Agent managers and sales managers each have their own set of dashboards to help manage the business and build top-performing teams.

 **Note:** Additionally, agent managers and sales managers can also access all [agent dashboards](#) on page 65.

Dashboards for Agent Managers

Start with **Agent Manager Home** to get an at-a-glance summary of your team's performance. See quarterly total gross written premiums, lead conversion rate, and closed won amount for your agents. Click the **Open Dashboard** links beneath each summary chart to see detailed dashboards.

Agent Manager: Team Book of Business

Opens to the **Team Leaderboard** page. Dig into each page to see how your agents are contributing to your bottom line results.

- **Team Leaderboard.** See how your team's performing on key business metrics and find out if team members need coaching in any specific areas.
- **Regional View.** Learn who your top and bottom performers are in each geography you manage.
- **Drivers of Success.** Learn if there's a correlation between two metrics in driving the business. For example, select **# Activities** and **Gross Written Premium** to learn if more agent activities result in greater premiums.
- **Hunter vs. Farmer.** Learn about your team's most successful hunters—agents who get the most business from new customers. Also learn about the best farmers by seeing who gets the most business from existing customers.
- **Comparative Trend.** See trends over time for your agents' KPIs, such as gross written premiums, number of customers, and number of policies.
- **1–1 Helper.** Get ready for individual meetings with your agents by learning how each of their KPIs rank against the rest of the team's results.

Agent Manager: Customer Acquisition

Learn which of your agents closes leads most efficiently. Adjust the menus at the top of the dashboard to zero in on a segment of your leads. Visualizations are organized into the following two pages.

- **Which agent has the highest lead conversion?** See who has the highest conversion rate and how their rate compares to others' performance. You can also learn how many customer interactions each member of your team needs to convert a lead and their pipeline and referrals.
- **Which agent has the most efficient lead processing?** View how long each team member takes to process a lead to understand how efficient they are.

Agent Manager: Sales Performance

Get a complete picture of your team's sales results. See who your sales leaders are and understand your win rate. Also see how everyone's spending their time and see which deals your focusing on and which have the best chance of closing. KPIs are organized into the following pages.

- **Sales Performance - Closed Deals.** View a leaderboard to see who closes the most deals and learn how your top performers compare with other team members over time.
- **What is our win-loss ratio overall and by agent?** Find out which market segments you win more and which sources give you the best leads. Also compare your win rate for new business versus existing business.
- **Opportunity processing.** See which team members process opportunities most efficiently. Also find out if team members can sell faster to specific market segments.
- **Where are we spending time?** Is your team spending more time on high value opportunities? Also, how many activities do top performers spend per \$1,000 compared to low performers?
- **What deals are we focusing on?** Find out if there are any neglected opportunities languishing in a selected stage so you can take action to have an agent accelerate the deal.

Dashboards for Sales Managers

Sales Managers have their own home dashboard and versions of sales performance dashboards to help manage their teams to success.

Sales Manager Home

Sales managers get a summary review of sales results for all their agencies, then dig deeper for fine-grained insights. Click the Open Dashboard links beneath each summary chart to see detailed dashboards.

Sales Manager: Team Book of Business

See Agent Manager: Team Book of Business earlier in this topic. Includes the same KPIs, but for agencies instead of agents.

Sales Manager: Customer Acquisition


See Agent Manager: Customer Acquisition earlier in this topic. Includes the same KPIs, but for agencies instead of agents.

Sales Manager: Sales Performance

See Agent Manager: Sales Performance earlier in this topic. Includes the same KPIs, but for agencies instead of agents.

Analytics for Insurance Dashboards for Embedding

Analytics for Insurance includes dashboards that can be embedded in Lightning Experience pages to provide detailed insights on customers, leads, and opportunities. Check with your Salesforce administrator to see if these dashboards have been embedded in your Salesforce org.

 **Note:** If there's no data in the Financial Account Transaction object, you see insights based on Claims to Gross Written Premium (GWP) instead of Loss Ratio in your embedded dashboards.

Book of Business

Embed in an Account or Contact page layout to get an overview of your book of business. Shows the book of business for an agency or agent. Also shows gross written premiums, policies, renewal rate, loss ratio, claims value, and number of claims.

Customer

Embed in a Customer page layout to see how a customer's GWP and loss ratio compare to your average customer. Click the arrow to the right to open the next panel, which shows how many claims the customer has filed. The second panel also shows the approved claim cost and how long their claims have been open.

Distributor Book of Business

Intended for embedding in the sales manager Home page. Analyze the book of business for each of your distributors and whitespace—that is, upsell and resell opportunities—for distributors and customers. The Book of Business tab (default) shows sales by policy type and territory and total sales and other key performance indicators (KPIs) for the distributor selected from the Agency Name filter. Click the **Whitespace** tab to see a breakdown of the types of policies sold by each of your distributors. Set the **GWP** filter to get the top distributors and analyze upsell/resell opportunities for those distributors. The chart reveals which distributors sold few or no policies of certain types to suggest opportunities to upsell or resell those types of policies. Click **Customers** to see the same breakdown by customer.

Distributor Sales Performance

Intended to give distributors a summary of KPIs by embedding in Account and Contact records pages. Selections from the global filters apply to all the four dashboard tabs. Opens to the Sales tab, which shows performance by sales and renewals of policy types. Click the **Claims** tab to view performance by claims and loss ratio by policy type. The Customer Interaction tab shows time spent with customers and the number of weekly activities. Whitespace shows a breakdown of the types of policies sold to each of your customers.

Key Distributors

Intended for embedding in the sales manager Home page. See the leaderboard of distributors based on multiple KPIs. Default view shows performance by gross written premium. Click the tabs below that chart to see how distributors perform according to policy count, loss ratio, and GWP growth.

Lead/Referral

Embed in a Lead page layout to get insight into how likely you're to convert the lead based on its source and the level of interest in the product. Click the arrow on the right to view the number of activities associated with the lead to see if you give it enough attention. Click the arrow again to learn days until conversion for the lead to be sure it's progressing as expected.

Opportunity

Embed in an Opportunity page layout to learn the factors that influence win rate for a specific opportunity. Also see where the opportunity stands in the closing process and how its progress compares to other opportunities.

Household

Embed in an Account page to learn about the household's policies and claims when compared to the average of all households. The dashboard shows how the household is based on its gross written premium and loss ratio. Also, identify claims that are open for more than the average claim processing time.

Key Performance Indicators

Learn the definitions and calculations of key metrics shown in Analytics for Insurance dashboards.

This table lists the key metrics and their calculations.

Metric	Description	Calculation	Available in Dashboards
Total Gross Written Premium	Total gross written premium of all active insurance policies.	Sum of all Gross Written Premium field values in the Insurance Policy object. Filters applied: The value of the Active field in the Insurance Policy object is True.	<ul style="list-style-type: none"> Agent Home Upsell/Cross-sell Product Analysis My Customers
Customers	Total number of policy owners.	Count of unique values in the Name Insured field in the Insurance Policy object. Filter applied: The value of the Active field in the Insurance Policy object is True.	<ul style="list-style-type: none"> Agent Home Claims My Book of Business Agent Manager: Team Book of Business Customer Interaction

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled.

Metric	Description	Calculation	Available in Dashboards
			<ul style="list-style-type: none"> My Customers
Households	Total number of households.	Count of records in the Account object. Filter applied: Account Record Type field value is Household.	<ul style="list-style-type: none"> Agent Home Household Analysis
Upcoming Renewals	Number of upcoming policy renewals.	Count of records in the Insurance Policy object. Filters applied: Final Renewal Date field value is in the next 30 days. When there's no value in the Final Renewal Date field, then the records with Renewal Date field value in the next 30 days are considered.	Agent Home
Policies for the Best-Selling Product	Number of policies associated with the best-selling product.	Count of Insurance policy records grouped by Product field values.	
Average Number of Policies per Product	Unique policies for each product.	Unique insurance policy records grouped by Product field values.	
Open Claims	Total number of open claims.	Count of records in the Claim object. Filters applied: The value of the Closed field is False.	<ul style="list-style-type: none"> Agent Home Claims
Total Activities	Total number of tasks and events created in a month.	Count of records in Task and Event objects. Filter applied: Created Date value is in the current month.	<ul style="list-style-type: none"> Agent Home Agent Manager: Team Book of Business Customer Interaction
Closed Won Amount	Total amount from closed won opportunities.	Sum of all Amount field values in the Opportunity object. Filters applied: The value of the Close Date field is in the current fiscal quarter, IsWon is True, and IsClose is True.	<ul style="list-style-type: none"> Agent Home Agent Manager Home Sales Manager Home
Open Leads or Referrals	Total number of leads that are open.	Count of records in the Lead object. Filters applied: <ul style="list-style-type: none"> The value of the Lead Status field isn't Closed - Converted or Closed - Not Converted. Converted Date field value isn't in the duration between Created Date and today. 	<ul style="list-style-type: none"> Agent Home Customer Acquisition My Book of Business

Metric	Description	Calculation	Available in Dashboards
Opportunity Size	Potential premium amount from upselling or cross-selling a coverage.	(Count of values in the Name Insured ID field in the Insurance Policy Coverage object) * (Average premium amount for the coverage) Customers of Policy Type 1 but not Policy Type 2 * Avg premium of Policy Type 2	<ul style="list-style-type: none"> Agent Home Upsell/Cross-Sell
Policies	Total insurance policies.	Total records in the Insurance Policy object. Filters applied: The value of the Active field is True.	<ul style="list-style-type: none"> Agent Home My Book of Business Agent Manager: Team Book of Business Upsell/Cross-Sell Household Analysis My Customers Product Analysis
Policies with Open Claims	Number of insurance policies with open claims.	Count of unique values in the Policy Number field in the Claim object. Filter applied: The value of the Closed field in Claim object is False.	Claims
Total Estimated Claim Amount	Total estimated amount for claims.	Sum of all values in the Estimated Amount field in the Claim object. Filter applied: The value of the Closed field in Claim object is True.	
Average Estimated Claim Amount	Average of the estimated claims amount.	Average of the Estimated Amount field value in the Claim object Filter applied: The value of the Closed field in Claim object is True.	
Average Days to Close	Average number of days taken for processing a claim.	Average (Days between Initiation Date and coalesce (Finalized Date, today))	
Claims Open for More Than Last 3 Months Average	Number of claims that open for more than the average of the last 3 months processing time.	Count of open claims where the duration between the Initiation Date and today is more than the average of the duration between Finalized Date and Initiation Date. Filters applied: The value of the Finalized Date field is in the last 3 months and the value of the Closed field is False. Initiation Date, Finalized Date, and Closed are fields in the Claim object.	

Metric	Description	Calculation	Available in Dashboards
		 Note: The average is calculated for claims of a policy type.	
Open Claims by Processing Time	Open claims grouped by their processing time and status.	Open claims grouped by processing time and status. <ul style="list-style-type: none"> • On Track • Approaching Avg Processing Time for Policy Type • 1–10 days behind the average • More than 10 days behind the average 	
Claims by Estimated Amount	Open claims grouped by the estimated amounts.	Sum of Estimated Amount field values grouped by the Claim Number field values in the Claim object. Filter applied: The value of the Closed field is False	
Claims by Gross Written Premium	Open claims grouped by their gross written premium.	Sum of Gross Written Premium field values grouped by the Claim Number field values in the Claim object. Filter applied: The value of the Closed field is False.	
Processing Age Status	Status of the claim process.	<ul style="list-style-type: none"> • On Track • Approaching Avg Processing Time for Policy Type • 1–10 days behind the average • More than 10 days behind the average 	
Policies with Claims	Policies with Claims	Count of unique values in the Policy Number field in the Claim object. Filters applied: The value of Closed field is True, and Approved Amount value is greater than 0. Policy Number, Closed, and Approved Amount are fields in the Claim object.	
Average Approved Claim Amount	Average amount approved for claims.	$(\text{Sum of all values in the Approved Amount field}) / (\text{Count of values in the Approved Amount field})$ Filters applied: The value of Closed field is True, and Approved Amount value is greater than 0.	

Metric	Description	Calculation	Available in Dashboards
		Approved Amount and Closed are fields in the Claim object.	
Finalized Claims	Total number of finalized claims.	Count of records in the Claim object where a value exists in the Finalized Date field.	
Claims Severity	Claims grouped by severity.	Claims grouped by the Severity field values from the Claim object.	
Premium Bucket	Gross written Premium groups that are based on the premium amount ranges.	Gross written premium groups. <ul style="list-style-type: none"> • <200 • 200–500 • 501–700 • 701–1000 • 1001–1500 • 1501–2500 • 2501–5000 • >5000 • NA 	
Rejected Claim Amount	Total rejected claim amount.	Sum of Estimated Amount field values in the Claim object. Filters applied: The value of Approved Amount field is either 0 or null. The value of the Closed field is True.	
Customers with Rejected Claims	Number of customers with rejected claims.	Count of values in the Policy Owner Name field in the Policy object. Filters applied: Closed field value is True, and Approved Amount field doesn't have a value or the value is 0.	
Approval Rate	Percentage of claims that are approved.	(Count of records in the Claim object with Approved Amount greater than 0, Initiation Date is in the selected period, and IsClosed is True) / (Count of records in the Claim object with Approved Amount greater than 0, Initiation Date is in the selected period, and IsClosed is True) + (Count of records in the Claim object with Approved Amount is 0 or Null, Initiation Date is in the selected period, and IsClosed is True)	

Metric	Description	Calculation	Available in Dashboards
Processing Time in Days	Number of days for processing a claim.	Days between InitiationDate and FinalisedDate; and if FinalisedDate is null then Days between InitiationDate and now()	<ul style="list-style-type: none"> • Claims • Customer Acquisition
Approved Claims	Total number of approved claims.	Count of records in the Claim object. Filters applied: The value of Closed field is True, and Approved Amount value is greater than 0.	<ul style="list-style-type: none"> • Claims • My Book of Business
Approved Claim Amount	Total amount approved for claims.	Sum of all values in the Approved Amount field in the Claim object. Filters applied: The value of Closed field is True, and Approved Amount value is greater than 0.	<ul style="list-style-type: none"> • Claims • My Book of Business • Agent Manager: Team Book of Business • Household Analysis • My Customers • Product Analysis
Loss Ratio	Total claims in relation to the total premiums earned.	<p>Total Claim Amount / Total Premium Earned</p> <p>Total Claims: Sum of all values in the Amount field in the Financial Account Transaction object. Filters applied: Transaction Type is Credit, Transaction Status is Posted, Transaction Date is in the selected duration, and a value exists in the Insurance policy field.</p> <p>Total Premium Earned: Sum of all values in the Amount field in the Financial Account Transaction object. Filters applied: Transaction Type is Debit, Transaction Status is Posted, Transaction Date is in the selected duration, and a value exists in the Insurance policy field.</p>	<ul style="list-style-type: none"> • Claims • My Book of Business • Household Analysis • My Customers • Product Analysis
Claims	Total number of claims in the selected duration.	Count of records in the Claim object.	<ul style="list-style-type: none"> • Claims • My Book of Business • Agent Manager: Team Book of Business • Household Analysis • My Customers • Product Analysis

Metric	Description	Calculation	Available in Dashboards
Age Group	Age group of the customer.	Customer age groups. <ul style="list-style-type: none"> • <18 • 18–29 • 30–49 • 50–69 • >69 • NA 	<ul style="list-style-type: none"> • Claims • Customer Acquisition • My Customers
Avg Age of Open Leads and Referrals (Days)	Average duration for which the leads and referrals are open.	<p>Average (Days between Created Date field value and today)</p> <p>Filters applied: The value of the Lead Status field isn't Closed - Converted or Closed - Not Converted. And Status isn't Null.</p> <p>Created Date is a field in the Lead object.</p>	Customer Acquisition
Oldest Lead or Referral Age (Days)	Age of the oldest lead or referral.	<p>Max (Days between Created Date field value and today)</p> <p>Filters applied: The value of the Lead Status field isn't Closed - Converted or Closed - Not Converted. And Status isn't Null.</p> <p>Created Date is a field from the Lead object.</p>	
Newest Lead or Referral Age (Days)	Age of the newly added lead or referral.	<p>Min (Days between Created Date field value and today)</p> <p>Filters applied: The value of the Lead Status field isn't Closed - Converted or Closed - Not Converted. And Status isn't Null.</p> <p>Created Date is a field from the Lead object.</p>	
Leads without Activity	Leads that don't have activities.	<p>Count of records in the Lead object grouped based on the days between Last Activity Date and today.</p> <p>When there's no value in the Last Activity Date field, the records are grouped based on the days between Created Date and today.</p>	
Leads by Age Group	Leads grouped based on their age.	Records in the Lead object are grouped based on the duration between Created Date and today.	

Metric	Description	Calculation	Available in Dashboards
Days Since Last Activity	Number of days since the last activity on the lead.	Days between Last Activity Date field value and today. When there's no value in the Last Activity Date field: Days between Created Date field value and today. Created Date and Last Activity Date are fields from the Lead object.	
Potential Value Range	Potential value ranges for leads.	Value Ranges: <ul style="list-style-type: none"> • <100 K • 100K-250K • 250K-500K • More than 500 K • Not Set 	
Lead Age	The age of the lead in days.	Number of days between the Created Date field value and today. Created Date is a field from the Lead object.	
Potential Value	The potential value of the lead.	Value of the Potential field in the Lead object.	
Referrer	Name of the person who referred the customer.	The value of the External Referrer or Internal Referrer field in the Contact object.	
Referrer Type	The type of referrer.	If the value of the External Referrer field in the Contact object isn't Null, then Referrer Type is External. If the value of the Internal Referrer field in the Contact object isn't Null, then Referrer Type is Internal.	
Closed Leads and Referrals	Number of leads and referrals that are closed.	Count of records in the Lead object. Filters applied: The value of the Lead Status field isn't Closed - Converted or Closed - Not Converted.	
Internal Referrers	Number of internal users who referred customers.	Count of values in the Internal Referrer field in the Contact object.	
External Referrers	Number of external contacts who referred other customers.	Count of values in the External Referrer field in the Contact object.	
Total Leads	Total number of leads.	Count of records in the Lead object.	

Metric	Description	Calculation	Available in Dashboards
Processed Leads	Number of leads that have been processed.	Count of records in the Lead object. Filters applied: The value of the Lead Status field isn't Closed - Converted or Closed - Not Converted.	
Converted Leads	Number of leads that have been converted.	Count of records in the Lead object. Filters applied: Converted field value is True	
Disqualified Leads	Number of Leads that aren't qualified.	Count of records in the Lead object. Filters applied: The value of the Lead Status field is Closed - Not Converted.	
Avg Number of Interactions Before Conversion	Average number of interactions with the customers before a lead is converted.	Average (number of times an event is generated by the Converted Contact ID or Lead ID from the Lead object) Filters applied: Converted field value is True, and Activity Date value is greater than or equal to the Converted Date field value. Converted Contact ID, Lead ID, Converted, Activity Date, and Converted Date are fields from the Lead object.	
Avg Number of Days for Conversion	Average number of days to convert a lead.	Number of days between the Created Date and the Conversion DateTime field values in the Lead object.	
Expressed Interest	The product that the customer is interested in.	Value of the Expressed Interest field in the Lead object.	
Customer Interactions	Number of interactions with the customer.	Number of times an event is generated by the Converted Contact ID or Lead ID from the Lead object.	<ul style="list-style-type: none"> • Customer Acquisition • Agent Manager: Team Book of Business
Lead Conversion Rate	The percentage of leads that are converted.	Number of converted leads / Number of processed leads	<ul style="list-style-type: none"> • Customer Acquisition • My Book of Business • Agent Manager: Team Book of Business
Processing Time	The time taken to process a lead.	Number of days between the Created Date and the Activity Date in the Lead object.	<ul style="list-style-type: none"> • Claims

Metric	Description	Calculation	Available in Dashboards
			<ul style="list-style-type: none"> Customer Acquisition
Gross Written Premium (GWP)	Total gross written premium of insurance policies.	<p>Sum of all Gross Written Premium field values in the Insurance Policy object.</p> <p>Filters applied: Active field value is True, and the Effective Date field value is in the selected period.</p> <p>Active and Effective Date are fields from the Insurance Policy object.</p>	<ul style="list-style-type: none"> My Book of Business Agent Manager: Team Book of Business Upsell/Cross-Sell My Customers Product Analysis
Customers	Total number of customers.	Count of values in the Name Insured field from the Insurance Policy object.	<ul style="list-style-type: none"> Claims My Book of Business Agent Manager: Team Book of Business Upsell/Cross-Sell Customer Interaction My Customers
Active Policies	Number of active insurance policies.	<p>Count of records in the Insurance Policy object.</p> <p>Filter applied: IsActive is True in the Insurance Policy object.</p>	My Book of Business
Policies In Force	Number of active insurance policies.	<p>Count of records in the Insurance Policy object.</p> <p>Filter applied: IsActive is True in the Insurance Policy object.</p>	<ul style="list-style-type: none"> My Book of Business Product Analysis
New Business Policies	Number of new insurance policies in a selected period.	<p>Count of records in the Insurance Policy object.</p> <p>Filters applied: Effective Date is in the selected Period, IsActive is True, and IsRenewedPolicy is False.</p>	<ul style="list-style-type: none"> My Book of Business Agent Manager: Team Book of Business
New Business GWP	Total gross written premium of new insurance policies.	<p>Sum of all values in the Gross Written Premium field in the Insurance Policy object.</p> <p>Filters applied: Effective Date is in the selected Period, IsActive is True, and IsRenewedPolicy is False.</p>	
Policies Canceled	Total number of policies canceled in a selected period.	Count of unique records in the Insurance Policy object. Filter applied: Cancellation Date is in the selected period.	

Metric	Description	Calculation	Available in Dashboards
Renewal Rate	Percentage of policies renewed.	$\frac{\text{Policies Renewed}}{\text{Policies Renewed} + \text{Policies Not Renewed}} * 100$ <p>Policies Renewed: Count of unique records in the Insurance Policy object where Date Renewed or Previous Renewal Date is in the selected period, and IsActive is True.</p> <p>Policies Not Renewed: (Count of unique records in the Insurance Policy object where Final Renewal Date is in the selected period, Date Renewed field has a value, and IsActive is True) - (Count of unique records in the Insurance Policy object where Previous Renewal Date is in the selected period, IsActive is True, and Prior Policy field has a value)</p>	
Customer Retention Rate	Percentage of customers retained.	(Count of Person Account records with at least one active policy at the end of the selected period) / (Count of Person Account records with at least one active policy 1 day before the start date of the selected period) * 100	
Win Rate	Win Rate	(Count of records in the Opportunity object where Stage is Closed Won) / (Total count of records in the Opportunity object)	
Policies Renewed	Total number of policies renewed in a selected period.	Count of unique records in the Insurance Policy object. Filter applied: Date Renewed is in the selected period.	My Book of Business
Claims Filed	Number of claims filed in a selected duration.	Count of records in the Claim object where Initiation Date is in the selected period.	
Customers with Claims	Number of customers who filed claims.	Count of Policy Owner field values in the Claim object. Filter applied: Initiation Date is in the selected period.	
Open Opportunities' Amount	Total amount from open opportunities.	Sum of all values in the Amount field from the Opportunity object. Filter applied: IsClosed is False	
Open Opportunities	Total number of open opportunities.	Count of records in the Opportunity object. Filter applied: IsClosed is False	
Average Age of Closed Leads (Days)	Average age of the closed deals.	Duration between Created Date and today. Filter applied: Status is Closed - Converted	


Metric	Description	Calculation	Available in Dashboards
Average Age of Opportunities (Days)	Average age of opportunities.	Duration between Created Date and today.	
Coverages	Total number of active insurance policy coverages.	Count of records in the Insurance Policy Coverage object. Filter applied: IsActive is True in the Insurance Policy object.	
Total Premium Amount	Total premium amount for the insurance policy coverages.	Sum of all values in the Premium Amount field in the Insurance Policy Coverage object.	
Policy Start Date	Date when the policy is created.	Value of the Created Date field in the Insurance Policy object.	
Policy Renewal Date	Renewal date of the insurance policy.	Value of the Renewal Date field in the Insurance Policy object.	
Total Revenue	Total revenue from insurance products.	Sum of values in the Total Revenue field from the FS(INS) - Product Earnings and Fees Insurance dataset.	
Total Commissions	Total commissions earned.	Sum of values in the Total Commissions field from the FS(INS) - Product Earnings and Fees Insurance dataset.	
Total Fees	Total fee collected.	Sum of values in the Total Fees field from the FS(INS) - Product Earnings and Fees Insurance dataset.	
Total Premiums	Total premiums from insurance policies.	Sum of values in the Total Premiums field from the FS(INS) - Product Earnings and Fees Insurance dataset.	
Snapshot Date	Date when the snapshot was taken.	Value of the Snapshot Date field in the FS(INS) - Product Earnings and Fees Insurance dataset.	
Policy Name	Name of the insurance policy.	Policy Name field value in the Insurance Policy object.	<ul style="list-style-type: none"> • Claims • My Book of Business
Coverage Name	Name of the insurance policy coverage.	Value of the Coverage Name field from the Insurance Policy Coverage object.	<ul style="list-style-type: none"> • My Book of Business • Upsell/Cross-sell
Policy Type	Type of the insurance policy.	Value of the Policy Type field in the Insurance Policy object.	<ul style="list-style-type: none"> • Claims • My Book of Business • Agent Manager: Team Book of Business • Upsell/Cross-Sell


Metric	Description	Calculation	Available in Dashboards
			<ul style="list-style-type: none"> Household Analysis Product Analysis
Policy Owner	Name of the person who owns the policy.	Value of the Name Insured field in the Insurance Policy object.	<ul style="list-style-type: none"> Claims My Book of Business Agent Manager: Team Book of Business
Plan Tier	Category of the insurance plan.	Value of the Plan Tier field in the Insurance Policy object.	<ul style="list-style-type: none"> My Book of Business Upsell/Cross-Sell Product Analysis
Product	Name of the insurance product.	Value of the Product field in the Insurance Policy object.	<ul style="list-style-type: none"> Claims My Book of Business Agent Manager: Team Book of Business Product Analysis
Premium Frequency	Frequency of the premium amount payment.	Value of the Premium Frequency field in the Insurance Policy object.	Upsell/Cross-sell
Activities	Number of tasks and events.	Count of records in the Task object + Count of records in the Event object.	<ul style="list-style-type: none"> Agent Home Agent Manager: Team Book of Business Customer Interaction
Activity Appointments	Number of appointments.	Count of Task and Event records where the TaskSubtype is Task.	Agent Manager: Team Book of Business
Activity Emails	Number of emails.	Count of Task and Event records where the TaskSubtype is Email.	
Activity Calls	Number of calls.	Count of Task and Event records where the TaskSubtype is Call.	
Opportunities Created	Total number of opportunities created in a selected period.	Count of records in the Opportunity object. Filters applied: Created Date is in the selected period, and IsClosed is False.	

Metric	Description	Calculation	Available in Dashboards
Closed Won Opportunities	Total number of opportunities won in a selected period.	Count of records in the Opportunity object. Filters applied: Closed Date is in the selected period, IsWon is True, and IsClosed is False.	
Average Number of Days Before Opportunity is Closed Won	Average number of days before an opportunity is closed won.	Average of duration between Created Date and Close Date.	
Renewed Policies	Total number of policies renewed in a selected period.	Count of unique policies in the Insurance Policy object. Filters applied: Date Renewed or Previous Renewal Date is in the selected period, and IsActive is True.	
Avg Number of Days Before First Customer Interaction	Average number of days before interacting with the customer for the first time.	Duration between Created Date and Activity Date.	<ul style="list-style-type: none"> Customer Acquisition Agent Manager: Team Book of Business
Agent	Name of the policy agent.	Value of the User Name field or the Contact Name field in the Producer object.	<ul style="list-style-type: none"> Agent Manager: Team Book of Business Upsell/Cross-Sell Customer Interaction My Customers Household Analysis Product Analysis

Einstein Discovery for Insurance Analytics Dashboards

The Einstein Discovery for Insurance Analytics dashboards give you intelligent insights on the likelihood of policy renewals and help you maximize renewals.

 **Important:** You can create and use the Einstein Discovery for Insurance Analytics App only if the Financial Services Cloud managed package is installed in your Salesforce org.


 **Note:** If the Einstein Discovery for Insurance Analytics app isn't available in your org, direct your administrator to, [Deploy CRM Analytics for Financial Services](#). To get predictions on the likelihood of policy renewals, your admin must [create the app from the Einstein Discovery for Insurance Analytics template](#).

The Einstein Discovery for Insurance Analytics app includes two dashboards:

EDITIONS

Available for an extra charge in **Professional**, **Performance**, and **Unlimited** editions that have Financial Services Cloud for Insurance enabled and the Financial Services Cloud managed package installed.

- Likelihood to Renew Policies
- Likelihood to Renew Policy - Embedded

 **Note:** To see data in your dashboards, make sure you have policies that are up for renewal in the next 90 days.

Likelihood to Renew Policies

Identify the likelihood of policy renewals, and focus on policies with high gross written premium and low renewal probability. The dashboard charts answer the following questions.

- Which policies are at risk of not being renewed?
- What's the likelihood of policy renewals?


Likelihood to Renew Policy - Embedded

Embed this dashboard on the Account page to get actionable insights on the renewal probability of policies.

- Which policies are at risk of not being renewed?
- What's the likelihood of policy renewals?

Use FSC Insurance Analytics Fast Start

The FSC Insurance Analytics Fast Start app is a quick stop for agents and managers to get insights into their book of business and to identify opportunities to improve sales. The dashboards provide accurate insights on the historical trends of Policies and Gross Written Premium over time. The dashboards also provide insights to identify opportunities to cross-sell policies to existing customers based on KPIs such as Gross Written Premium, Policy Type, Tenure, and Life Events.

 **Note:** FSC Insurance Analytics Fast Start is included with CRM Analytics for Financial Services, which is available for an additional cost to customers who have Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license. For deployment instructions, see [Deploy CRM Analytics for Financial Services](#).

FSC Insurance Analytics Fast Start Dashboards

The FSC Insurance Analytics Fast Start dashboards give you data-driven insights to effectively monitor the growth of your policies over time and to identify cross-selling opportunities within the existing customer base to improve the business revenue.

FSC Insurance Analytics Fast Start Dashboards

The FSC Insurance Analytics Fast Start dashboards give you data-driven insights to effectively monitor the growth of your policies over time and to identify cross-selling opportunities within the existing customer base to improve the business revenue.

You can access the FSC Insurance Analytics Fast Start app and its dashboards through CRM Analytics Studio.

Landing Page Dashboard

The Landing Page dashboard provides an overview of your book of business, cross-selling opportunities, policy trends, and team performance to quickly identify the areas that need attention. From each chart, you can go to the detailed analytics dashboards to get in-depth insights. The dashboard charts answer these questions:

- What are the cross-selling opportunities of a specific policy type in my customer base?
- What's the growth in Policies and Gross Written Premium (GWP) over time?
- What's my team's performance on GWP?

Cross-Sell Dashboard

The Cross-Sell dashboard provides insights to identify cross-selling opportunities for existing customers based on multiple KPIs. The dashboard charts answer these questions:

- How many customers exist for each policy type?
- What are the cross-selling opportunities for each policy type in my customer base?
- What are the cross-selling opportunities for customers who have experienced a life event recently?
- Who are my valuable customers based on GWP and tenure?

Book of Business Dashboard

The Book of Business dashboard contains the visualizations to quickly analyze your book of business. The dashboard charts answer these questions:

- What's the GWP for each policy type?
- What's the growth in Policies and GWP over time?
- Did Policies or GWP increase or decrease significantly for any state?
- What's the GWP for new business?

Team Performance Dashboard

The Team Performance dashboard provides insights to track the team and agent performance over a period. The dashboard charts answer these questions:

- Who are the top-performing agents?
- What's my team's performance and is the performance improving over time?
- What's the performance of a specific insurance agent compared to the team and is the agent's performance improving over time?

Cross-Sell Dashboard (Embedded)

Embed the Cross-Sell dashboard in an Account page to get insights into the cross-sell opportunities for a specific customer. The dashboard charts answer these questions:

- What's the GWP of a customer's current policies?
- What are the policy preferences of other similar customers?
- What are the cross-sell opportunities for a customer?

Retention Rate Dashboard

The Retention Rate dashboard provides insights into the retention rate of the team and the agents. The dashboard charts answer these questions:

- What's the current retention rate?
- How many policies are upcoming for renewals?
- How's my team's retention rate and is the retention rate improving over time?
- What's the team's average retention rate?
- What's the performance of a specific insurance agent compared to the team and is the performance improving over time?


Canceled Policies Dashboard

The Canceled Policies dashboard provides insights to track the canceled policies over a period, identify reasons for cancellation, and analyze the period with higher policy cancellation. The dashboard charts answer these questions:

- How many policies did customers cancel and are cancellations increasing or decreasing over time?
- What are the top reasons for policy cancellations?

Use Analytics for Vlocity Insurance

CRM Analytics for Vlocity Insurance includes the Insurance Claims and Policy Analytics app and Policy Renewal Prediction app. Use the Insurance Claims and Policy Analytics app to get actionable insights into claims management and policy administration. With the Insurance Claims and Policy Analytics dashboards, claim handlers and producers can prioritize tasks, claims, quotes, and policies that need immediate attention to improve customer satisfaction.

 **Note:** Insurance Claims and Policy Analytics is available at an extra charge for Vlocity customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license. For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#)

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions where Financial Services Cloud for Insurance is enabled and Vlocity Insurance is installed

[Insurance Claims and Policy Analytics Dashboards](#)

Insurance Claims and Policy Analytics dashboards give you actionable insights to effectively manage your claims, quotes, and policies.

[Key Performance Indicators](#)

Learn the definitions and calculations of key metrics shown in Insurance Claims and Policy Analytics.

[Use Policy Renewal Prediction](#)

The Policy Renewal Prediction app, with its Einstein Discovery-powered dashboards, gives you intelligent insights on the likelihood of policy renewals. With these smart predictive analytics, you can quickly identify the customers who are unlikely to renew their policy and devise strategies to improve renewals.

Insurance Claims and Policy Analytics Dashboards

Insurance Claims and Policy Analytics dashboards give you actionable insights to effectively manage your claims, quotes, and policies.

You can access the Insurance Claims and Policy Analytics app and its dashboards through CRM Analytics Studio.

Claims Handler Dashboard

The Claims Handler dashboard gives you actionable insights on open claims and tasks to efficiently manage your workload. The dashboard answers these questions:

- How many open tasks are overdue or due tomorrow?
- Do I have any regulatory tasks open?
- Do any open tasks related to high-severity claims exist?
- What are the high-priority tasks to focus on today?
- How many claims are open for more than the average claim settling time?
- Which are the high-severity open claims?

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions where Financial Services Cloud for Insurance is enabled and Vlocity Insurance is installed

- What's the distribution of claims by loss type?

Claims Team Leader Dashboard

The Claims Team Leader dashboard tracks your team's performance and ensures that the team members comply with the SLAs. With insights into key metrics, you can forecast your staffing better. The dashboard answers these questions:

- How's my team performing based on the key metrics for claims and tasks?
- What's the distribution of claims by status?

Producer Dashboard

The Producer dashboard identifies tasks, quotes, and policies that need your attention. The dashboard answers these questions:

- How many open tasks are overdue or due tomorrow?
- Are any high-priority tasks open?
- How many quotes and policy-related tasks are open?
- How many quotes are open? And for how long are they open?
- What's the estimated commission on a quote?
- Which policies are up for renewal in the next 30 or 60 days?
- Which policies have high gross written premium?

Producer Performance Dashboard

The Producer Performance dashboard gives insights into your performance based on key metrics for quotes and policies. The dashboard answers these questions:

- What are the key metrics for my Book of Business?
- How am I doing based on the key metrics?
- How much did I earn in commissions?

Claims Performance Dashboard

The Claims Performance dashboard gives you insights to understand your claims data better and improve the service quality. The dashboard answers these questions:

- How's my business performing based on key metrics, such as claims over time, closed claims, closure rate, settlement ratio, and average time to settle a claim?
- What's the trend of new claims and claims pending from a previous period?
- What's the trend of the closure rate for claims?
- What's the distribution of the total claims by line of business, state, and loss type?

Financial Performance Dashboard

The Financial Performance dashboard gives you actionable insights into your financial performance. With the dashboard visualizations, you can effectively manage expenses and reserves, devise strategies to reduce your operations costs, and write policies that increase your revenue. The dashboard answers these questions:

- What's the distribution of the total expense paid, the expense reserves, and the loss reserves by line of business, states, and loss types?

- What's the distribution of the total amount paid and the total loss amount by claim type, states, and loss types?
- How's the loss ratio based on the line of business, product, states, and loss type?
- How's my financial performance when compared to a previous period?

Producer Team Performance Dashboard

The Producer Team Performance dashboard gives you insights to effectively manage your team and balance the team's workload. Monitor your team's performance based on key metrics for tasks, quotes, and policies. The dashboard charts answer these questions:

- How's my team performing based on key metrics for policies, quotes, and tasks?
- What's the distribution of open tasks by due date, task type, and quotes and policies?
- What's the distribution of open quotes by open duration and quoted commission?
- How many policies are up for renewal in the next 30 or 60 days?
- What's my team's average number of open tasks, open quotes, and policies up for renewal?
- How many quotes are open? And for how long are they open?
- What's the estimated commission on a quote?

Producer Team Performance Historical Dashboard

The Producer Team Performance Historical dashboard monitors your team's historical performance and coaches your team members to improve their performance. The dashboard charts answer these questions:

- How's my team performing based on key metrics like GWP, policies, earned commissions, quote conversion rate, and renewal rate?
- How's my team performing when compared to a previous period?

Sales Performance Dashboard

The Sales Performance dashboard provides actionable insights to identify products with high commissions, high GWP, high renewal rate, and new business. You can also use the dashboard to monitor an agent's sales performance based on key metrics. The dashboard charts answer these questions:

- How are my team's sales based on key metrics for quotes, policies, and commissions?
- What are the top-selling products?
- Which products can give high commissions?
- Which products have policies with high GWP?
- Which products have a high policy-renewal rate?
- Which products have policies from new businesses?

Book of Business Dashboard

The Book of Business dashboard contains the visualizations to quickly analyze your book of business. The dashboard charts answer these questions:

- What's our performance on insurance-industry KPIs?
- What's our sales distribution over policy types and geography?

Distributor Book of Business Dashboard

The Distributor Book of Business dashboard analyzes the book of business for each of your distributors and the whitespace for distributors and customers. The dashboard charts answer these questions:

- How do my distributors perform based on insurance-industry KPIs?
- Who are my top-performing distributors?
- What's the breakdown of the types of policies sold by each of my distributors?
- What are the cross-sell opportunities for my distributors?

Distributor Sales Performance Dashboard

The Distributor Sales Performance dashboard analyzes the sales performance based on multiple KPIs. The dashboard charts answer these questions:

- How do my distributors perform on sales and renewals based on policy type?
- How do my distributors perform on claims and loss ratio based on policy type?
- What's the number of activities completed for the distributor?
- What's the breakdown of the policy types sold by my distributors to each of the customers?
- What are the reasons for policy cancellations?

Key Distributors Dashboard

The Key Distributors dashboard provides a quick view of the leaderboard of distributors based on multiple KPIs. The dashboard charts answer these questions:

- Who are my top-performing distributors based on GWP, policy count, loss ratio, or GWP growth?
- How does each of my distributors perform based on insurance-industry KPIs?

Key Performance Indicators

Learn the definitions and calculations of key metrics shown in Insurance Claims and Policy Analytics.

This table lists the key metrics and their calculations.

Metric	Description	Calculation
Claims Open Tasks	Number of claims-related open tasks.	Count of records in the Task object, where: <ul style="list-style-type: none"> • The value of the Related To field is either Claim or Claim Coverage. • The value of the Status field isn't Completed.
Open Tasks by Due Date	Claims-related open tasks grouped by due date.	Claims-related open tasks grouped by these due date groups: <ul style="list-style-type: none"> • Overdue • Due today

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions where Financial Services Cloud for Insurance is enabled and Vlocity Insurance is installed

Metric	Description	Calculation
		<ul style="list-style-type: none"> • Due tomorrow • Due in 3–4 days • Due in 4–7 days • Due after this week
Open Tasks by Type	Open tasks grouped by task type.	Open Tasks grouped by the values in the Type field in the Task object.
Open Tasks by Priority	Open tasks grouped by priority.	Open Tasks grouped by the values in the Priority field in the Task object.
Open Claims	Number of open claims.	Count of values in the Claim Number field from the Claim object, where: <ul style="list-style-type: none"> • The value of the Closed field is False. • Claim Number and Closed are fields in the Claim object.
Open Claims by Open Duration	Open claims by the duration for which they're open.	Days between Initiation Date and today, where: <ul style="list-style-type: none"> • The value of the Closed field is False. • Initiation Date and Closed are fields in the Claim object.
Average Claim Settling Time	Average time taken to settle a claim.	Average of days between Finalized Date and Initiation Date for all claims, where: <ul style="list-style-type: none"> • The value of the Closed field is True. • A value exists in the Finalized Date field. • Finalized Date, Initiation Date, and Closed are fields in the Claim object.
Open Claims by Status	Open claims grouped by status.	Open Claims grouped by the values in the Status field in the Claim object.
Open Claims by Loss Type	Open claims grouped by loss type.	Open Claims grouped by the values in the Loss Type field in the Claim object.
Open Tasks	Number of open tasks related to insurance policies or quotes.	Count of records in the Task object, where: <ul style="list-style-type: none"> • The value of Related To field is either Insurance Policy or Quote. • The value of the Status field isn't Completed. • Related To and Status are fields in the Task object.

Metric	Description	Calculation
Open Tasks by Due Date	Insurance policy or quote-related open tasks grouped by due date.	Insurance Policy or Quote-related open tasks grouped by these due dates: <ul style="list-style-type: none"> • Overdue • Due today • Due tomorrow • Due in 3–4 days • Due in 4–7 days • Due after this week
Open Tasks by Priority	Open tasks grouped by priority.	Open tasks grouped by the values in the Priority field.
Open Quotes	Number of open quotes.	Count of records in the Quote object, where: <ul style="list-style-type: none"> • The End Date field doesn't have a value or the End Date field value is greater than or equal to today. • The Status field value isn't Issued, Rejected, or Denied.
Open Quotes by Open Duration Groups	Open quotes grouped by the open duration groups.	Open quotes grouped by these open duration groups: <ul style="list-style-type: none"> • Quotes open for less than 2 days • Quotes open for 2–7 days • Quotes open for 1–2 weeks • Quotes open for 3–4 weeks • Quotes open for more than 4 weeks
Open Quotes by Open Duration	Open quotes by open duration.	Open quotes grouped by the duration between the Effective Date and today, where: <ul style="list-style-type: none"> • The value of the Status field isn't Issued, Rejected, or Denied. • Effective Date and Status are fields in the Quote object.
Quoted Commission	Commission amount for an open quote.	Sum of the Commission Amount field values for all open quotes.
Policies Up For Renewal	Number of policies that are up for renewal in the selected duration.	Count of records in the Insurance Policy object, where: <ul style="list-style-type: none"> • The value of the Final Renewal Date field is in the selected duration. If the Final Renewal Date doesn't have a value, the Renewal Date field is considered.

Metric	Description	Calculation
		<ul style="list-style-type: none"> The value of the Status field isn't Terminated, Canceled, or Customer Rejected.
Days to Renewal	Number of days before the policy renewal due date.	<p>Duration in days between the Final Renewal Date and today.</p> <p>When the Final Renewal Date field doesn't have a value: Duration in days between the Renewal Date and today. Final Renewal Date and Renewal Date are fields in the Insurance Policy object.</p>
Gross Written Premium	Total gross written premium of all policies.	Sum of the Gross Written Premium values in the Insurance Policy object.
Earned Commissions	Total commission amount from insurance policies.	<p>Sum of the Total Commission Amount field values in the Insurance Policy object, where:</p> <ul style="list-style-type: none"> The value of the Effective Date field is in the selected duration. Total Commission Amount and Effective Date are fields in the Insurance Policy object.
Quote Conversion Rate	Percentage of quotes converted to policies.	(Count of records in the Insurance Policy object with a value in the Source Quote field)/(Count of records in the Quote object) * 100, where the value of the Effective Date field is in the selected duration.
Policy Renewal Rate	Percentage of policies renewed.	<p>$\text{Policies Renewed} * 100 / (\text{Policies Renewed} + \text{Policies Not Renewed})$</p> <p>Policies Renewed: Count of Insurance Policy records where the Final Renewal Date or Renewal Date field value is in the selected duration, and a value exists in the Date Renewed field.</p> <p>Policies Not Renewed: Count of Insurance Policy records where the Final Renewal Date field value or Renewal Date field value is in the selected duration. The Date Renewed field doesn't have a value and the Status field value is Terminated, Cancelled, or Customer Rejected.</p>
Quote Conversion Rate based on Amount	Percentage of quotes converted to policies based on premium.	$(\text{Sum of Gross Written Premium of Insurance Policy records with a value in the Source Quote field}) / (\text{GWP of all Quotes}) * 100,$

Metric	Description	Calculation
		where the value of the Effective Date field is in the selected duration.
Policy Renewal Rate based on GWP	Percentage of policies renewed based on premium.	<p>(Sum of Gross Written Premium of Policies Renewed * 100)/(Sum of Gross Written Premium of Policies Renewed + Sum of Gross Written Premium of Policies Not Renewed)</p> <p>Policies Renewed: Count of Insurance Policy records where the Final Renewal Date or Renewal Date field value is in the selected duration, and a value exists in the Date Renewed field.</p> <p>Policies Not Renewed: Count of Insurance Policy records where the Final Renewal Date field value or Renewal Date field value is in the selected duration. The Date Renewed field doesn't have a value and the Status field value is Terminated, Cancelled, or Customer Rejected.</p>
Open Tasks by Open Duration	Open tasks grouped by the duration for which they're open.	<p>Open tasks grouped by these open duration groups:</p> <ul style="list-style-type: none"> • Open for less than 2 days • Open for 2–7 days • Open for 1–2 weeks • Open for 3–4 weeks • Open for more than 4 weeks
Open Claims by Severity	Open claims grouped by severity.	Open Claims grouped by the values in the Severity field in the Claim object.
Tasks Related to Quotes or Policies	Number of open tasks related to insurance policies or quotes.	<p>Count of records in the Task object, where:</p> <ul style="list-style-type: none"> • The value of Related To field is either Insurance Policy or Quote, and the value of the Status field isn't Completed. • Related To and Status are fields in the Task object.
Total Policies	Total number of insurance policies.	Count of records in the Insurance Policy object, where the value of the Effective Date field is in the selected duration.

Metric	Description	Calculation
Endorsed Policies	Total number of endorsed policies.	Count of records in the Insurance Policy object, where: <ul style="list-style-type: none"> The value of the Effective Date field is in the selected duration. A value exists in the Prior Policy field.
GWP from New Businesses	Total gross written premium from new insurance policies.	Sum of the Gross Written Premium values in the Insurance Policy object, where: <ul style="list-style-type: none"> The value of the Effective Date field is in the selected duration. The Renewed Policy field value is False.
Policies from New Businesses	Number of policies from new businesses.	Count of records in the Insurance Policy object, where: <ul style="list-style-type: none"> The value of the Effective Date field is in the selected duration. A value doesn't exist in the Prior Policy field. The Renewed Policy field value is False.
Total GWP	Total gross written premium of the policies in the selected duration.	Sum of the values in the Gross Written Premium field in the Insurance Policy object, where the value of the Effective Date field is in the selected duration.
Total Quotes	Total number of quotes in the selected duration.	Count of records in the Quote object, where: <ul style="list-style-type: none"> The value of the Effective Date field is in the selected duration. The value of the Status field is Issued, Rejected, or Denied.
Total Quoted Premium	Total premium amount quoted in the selected duration.	Sum of the values in the Total Premium field in the Quote object, where: <ul style="list-style-type: none"> The value of the Effective Date field is in the selected duration. The value of the Status field is Issued, Rejected, or Denied.
Average Quoted Premium	Average of the premium amounts quoted.	(Sum of Total Premium values in the Quote object) / (Count of records in the Quote object)
Average GWP	Average gross written premium of policies in the selected duration.	(Sum of Gross Written Premium values in the Insurance Policy object) / (Count of

Metric	Description	Calculation
		records in the Insurance Policy object), where the value of the Effective Date field is in the selected duration.
New Claims	Number of new claims in the selected duration.	Count of values in the Claim Number field from the Claim object, where the value of Initiation Date is in the selected duration.
Pending Claims	Number of claims pending settlement. These claims are carried forward from a previous period to the current period.	Count of values in the Claim Number field from the Claim object, where the value of the Closed field is False in the selected duration.
Closed Claims	Number of claims closed in the selected duration.	Count of values in the Claim Number field from the Claim object, where: <ul style="list-style-type: none"> • The value of the Finalized Date field is in the selected duration. • The Closed field value is True.
Claim Closure Rate	Percentage of claims closed in the selected duration.	$(\text{Claims Closed}) / (\text{New Claims} + \text{Pending Claims}) * 100$
Total Amount Paid	Total amount paid to customers.	Total Loss Amount + Total Expense Paid
Total Loss Amount	Total amount paid for losses in the selected duration.	Sum of the values in the Adjusted Amount field in the Claim Coverage Payment Detail object, where: <ul style="list-style-type: none"> • The value of the Type field is Loss. • A lookup to Claim Payment Summary exists and the value of Payment Date is in the selected duration. • Type and Claim Payment Summary are fields in the Claim Coverage Payment Detail object. • Payment Date is a field in the Claim Payment Summary object.
Total Expense Paid	Total expenses paid in the selected duration.	Sum of the values in the Adjusted Amount field in the Claim Coverage Payment Detail object, where: <ul style="list-style-type: none"> • The value of the Type field is Expense. • A lookup to Claim Payment Summary exists and the value of Payment Date is in the selected duration. • Type and Claim Payment Summary are fields in the Claim Coverage Payment Detail object.

Metric	Description	Calculation
		<ul style="list-style-type: none"> • Payment Date is a field in the Claim Payment Summary object.
Current Loss Reserve	Total losses incurred that are pending payment.	Sum of the values in the Loss Reserve Amount field in the Claim Coverage object, where the value of the Closed field is False in the Claim ID lookup.
Current Expense Reserve Amount	Total expenses incurred that are pending payment.	Sum of the values in the Expense Reserve Amount field in the Claim Coverage object, where the value of the Closed field is False in the Claim ID lookup.
Loss Ratio	Losses incurred due to claims as a percentage of the premiums earned.	$(\text{Total Loss Paid} + \text{Total Expense Paid}) / \text{Earned Premium}$
Earned Premium	Total premium earned in the selected duration.	<p>$(\text{Total Premium} / \text{Policy Term}) * (\text{Date Y} - \text{Date X})$</p> <p>Total Premium = Sum of the values in the Term Premium field in the Insurance Policy Coverage object.</p> <p>Policy Term = (The value of the Expiration Date field in the Insurance Policy object) - (The value of the Effective Date field in the Insurance Policy object).</p> <p>Here's how Date X and Date Y are calculated:</p> <ul style="list-style-type: none"> • When the effective date is in the selected duration and the expiration date is greater than or equal to the end date of the selected duration: <ul style="list-style-type: none"> - Date X = Effective Date - Date Y = End date of the selected duration • When the effective date is less than or equal to the start of the selected duration and the expiration date is in the selected duration: <ul style="list-style-type: none"> - Date X = Start date of the selected duration - Date Y = Expiration Date • When the effective date is less than or equal to the start of the selected duration and the expiration date is

Metric	Description	Calculation
		<p>greater than or equal to the end date of the selected duration:</p> <ul style="list-style-type: none"> - Date X = Start date of the selected duration - Date Y = End date of the selected duration <ul style="list-style-type: none"> • When the effective date and expiration date are in the selected duration: <ul style="list-style-type: none"> - Date X = Effective Date - Date Y = Expiration Date
Settlement Ratio	Percentage of claims settled in the selected duration.	<p>Approved Claims / Total Closed Claims</p> <p>Approved Claims = Count of records in the Claims object where Finalized Date in the selected duration and Closed is True. The claim has at least one corresponding record in the Claim Coverage Payment Detail object where:</p> <ul style="list-style-type: none"> • Type is Loss • Adjusted Amount is greater than 0 • A value exists in the Claim Payment Summary field <p>Closed Claims = Count of records in the Claims object where Finalized Date is in the selected duration and Closed is True.</p>
Open Tasks by Open Duration	Open tasks grouped by the duration for which they're open.	<p>Open tasks grouped by these open duration groups:</p> <ul style="list-style-type: none"> • Open for less than 2 days • Open for 2–7 days • Open for 1–2 weeks • Open for 3–4 weeks • Open for more than 4 weeks
Open Claims by Severity	Open claims grouped by severity.	Open Claims grouped by the values in the Severity field in the Claim object.
Tasks Related to Quotes or Policies	Number of open tasks related to insurance policies or quotes.	<p>Count of records in the Task object, where:</p> <ul style="list-style-type: none"> • The value of the Related To field is either Insurance Policy or Quote, and the value of the Status field isn't Completed.

Metric	Description	Calculation
		<ul style="list-style-type: none"> • Related To and Status are fields in the Task object.
Total Policies	Total number of insurance policies.	Count of records in the Insurance Policy object, where the value of the Effective Date field is in the selected duration.
Endorsed Policies	Total number of endorsed policies.	Count of records in the Insurance Policy object, where: <ul style="list-style-type: none"> • The value of the Effective Date field is in the selected duration. • A value exists in the Prior Policy field.
GWP from New Businesses	Total gross written premium from new insurance policies.	Sum of the Gross Written Premium values in the Insurance Policy object, where: <ul style="list-style-type: none"> • The value of the Effective Date field is in the selected duration. • The Renewed Policy field value is False.
Policies from New Businesses	Number of policies from new businesses.	Count of records in the Insurance Policy object, where: <ul style="list-style-type: none"> • The value of the Effective Date field is in the selected duration. • A value doesn't exist in the Prior Policy field. • The Renewed Policy field value is False.
Total GWP	Total gross written premium of the policies in the selected duration.	Sum of the values in the Gross Written Premium field in the Insurance Policy object, where the value of the Effective Date field is in the selected duration.
Total Quotes	Total number of quotes in the selected duration.	Count of records in the Quote object, where: <ul style="list-style-type: none"> • The value of the Effective Date field is in the selected duration. • The value of the Status field is Issued, Rejected, or Denied.
Total Quoted Premium	Total premium amount quoted in the selected duration.	Sum of the values in the Total Premium field in the Quote object, where: <ul style="list-style-type: none"> • The value of the Effective Date field is in the selected duration. • The value of the Status field is Issued, Rejected, or Denied.

Metric	Description	Calculation
Average Quoted Premium	Average of the premium amounts quoted.	(Sum of Total Premium values in the Quote object) / (Count of records in the Quote object)
Average GWP	Average gross written premium of policies in the selected duration.	(Sum of Gross Written Premium values in the Insurance Policy object) / (Count of records in the Insurance Policy object), where the value of the Effective Date field is in the selected duration.
New Claims	Number of new claims in the selected duration.	Count of the values in the Claim Number field from the Claim object, where the value of Initiation Date is in the selected duration.
Pending Claims	Number of claims pending settlement. These claims are carried forward from a previous period to the current period.	Count of the values in the Claim Number field from the Claim object, where the value of Closed field is False in the selected duration.
Closed Claims	Number of claims closed in the selected duration.	Count of the values in the Claim Number field from the Claim object, where: <ul style="list-style-type: none"> • The value of the Finalized Date field is in the selected duration. • The Closed field value is True.
Claim Closure Rate	Percentage of claims closed in the selected duration.	$(\text{Claims Closed}) / (\text{New Claims} + \text{Pending Claims}) * 100$
Total Amount Paid	Total amount paid to customers.	Total Loss Amount + Total Expense Paid
Total Loss Amount	Total amount paid for losses in the selected duration.	Sum of the values in the Adjusted Amount field in the Claim Coverage Payment Detail object, where: <ul style="list-style-type: none"> • The value of the Type field is Loss. • A lookup to Claim Payment Summary exists and the value of Payment Date is in the selected duration. • Type and Claim Payment Summary are fields in the Claim Coverage Payment Detail object. • Payment Date is a field in the Claim Payment Summary object.
Total Expense Paid	Total expenses paid in the selected duration.	Sum of the values in the Adjusted Amount field in the Claim Coverage Payment Detail object, where: <ul style="list-style-type: none"> • The value of the Type field is Expense.


Metric	Description	Calculation
		<ul style="list-style-type: none"> • A lookup to Claim Payment Summary exists and the value of Payment Date is in the selected duration. • Type and Claim Payment Summary are fields in the Claim Coverage Payment Detail object. • Payment Date is a field in the Claim Payment Summary object.
Current Loss Reserve	Total losses incurred that are pending payment.	Sum of the values in the Loss Reserve Amount field in the Claim Coverage object, where the value of the Closed field is False in the Claim ID lookup.
Current Expense Reserve Amount	Total expenses incurred that are pending payment.	Sum of the values in the Expense Reserve Amount field in the Claim Coverage object, where the value of the Closed field is False in the Claim ID lookup.
Loss Ratio	Losses incurred due to claims as a percentage of the premiums earned.	$(\text{Total Loss Paid} + \text{Total Expense Paid}) / \text{Earned Premium}$
Earned Premium	Total premium earned in the selected duration.	<p>$(\text{Total Premium} / \text{Policy Term}) * (\text{Date Y} - \text{Date X})$</p> <p>Total Premium = Sum of the values in the Term Premium field in the Insurance Policy Coverage object.</p> <p>Policy Term = (The value of the Expiration Date field in the Insurance Policy object) - (The value of the Effective Date field in the Insurance Policy object).</p> <p>Here's how Date X and Date Y are calculated :</p> <ul style="list-style-type: none"> • When the effective date is in the selected duration and the expiration date is greater than or equal to the end date of the selected duration: <ul style="list-style-type: none"> - Date X = Effective Date - Date Y = End date of the selected duration • When the effective date is less than or equal to the start of the selected duration and the expiration date is in the selected duration:

Metric	Description	Calculation
		<ul style="list-style-type: none"> - Date X = Start date of the selected duration - Date Y = Expiration Date • When the effective date is less than or equal to the start of the selected duration and the expiration date is greater than or equal to the end date of the selected duration: <ul style="list-style-type: none"> - Date X = Start date of the selected duration - Date Y = End date of the selected duration • When the effective date and expiration date are in the selected duration: <ul style="list-style-type: none"> - Date X = Effective Date - Date Y = Expiration Date
Settlement Ratio	Percentage of claims settled in the selected duration.	<p>Approved Claims / Total Closed Claims</p> <p>Approved Claims = Count of records in the Claims object where Finalized Date is in the selected duration and Closed is True. The claims object has at least one corresponding record in the Claim Coverage Payment Detail object, where:</p> <ul style="list-style-type: none"> • Type is Loss • Adjusted Amount is greater than 0 • A value exists in the Claim Payment Summary field. <p>Closed Claims = Count of records in the Claims object where Finalized Date is in the selected duration and Closed is True.</p>
Sales by State	Total gross written premium amount of all policies by the billing state.	Sum of Gross Written Premium from Insurance Policy, where effective date is in the selected duration grouped by InsurancePolicy.NameInsured.BillingState.
GWP from Renewals	Total gross written premium amount from the renewed policies.	<p>Sum of Gross Written Premium of Policies Renewed, where:</p> <ul style="list-style-type: none"> • The Final Renewal Date or Renewal Date field value is in the selected duration. • A value exists in the Date Renewed field.

Metric	Description	Calculation
GWP Growth	Percentage of growth in gross written premium amount based on duration.	$(\text{Sum of GWP from Insurance Policy where effective date is in the selected duration} - \text{Sum of GWP from Insurance Policy where effective date is in the Compare To duration}) / \text{Sum of GWP from Insurance Policy, where effective date is in the Compare To duration} * 100$
GWP by New Business	Total gross written premium amount from the new policies.	Sum of GWP from Insurance Policy, where Effective Date is in the selected duration and Renewed Policy is False.
Policies by Cancellation Reason	Number of canceled policies based on cancellation reason	Number of policies where Canceled date is within the selected duration and is grouped by Cancellation Reason Type.
Claims Total Paid	Total claim amount paid to the customers	Total Loss Paid + Total Expense Paid
Tasks	Number of completed tasks by insurance policy or quote.	Count of Tasks related to Insurance Policy or Quote, where task status is Completed.
Tasks by Week	Number of completed tasks for the insurance policy or quote in a week	Count of Tasks related to Insurance Policy or Quote, where task status is Completed and is grouped week-wise based on CompletedDateTime.
Total Paid	Total amount paid to the customers.	Total Loss Paid + Total Expense Paid

Use Policy Renewal Prediction

The Policy Renewal Prediction app, with its Einstein Discovery-powered dashboards, gives you intelligent insights on the likelihood of policy renewals. With these smart predictive analytics, you can quickly identify the customers who are unlikely to renew their policy and devise strategies to improve renewals.

 **Note:** Policy Renewal Prediction app is available at an extra charge for Vlocity customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license. For complete deployment instructions, see [Deploy Tableau CRM for Financial Services](#)

You can access the Policy Renewal Prediction app and its dashboards through CRM Analytics Studio.

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions where Financial Services Cloud for Insurance is enabled and Vlocity Insurance is installed.

Likelihood of Policy Renewal Dashboard

The Likelihood of Policy Renewal dashboard gives you insights on policies that are at a high risk of not being renewed. The dashboard charts answer these questions:

- How many policies are up for renewal?
- How many customers are to be considered?
- What is the GWP for policies that are up for renewal?

- Which policies are at risk of not being renewed?
- Which are the high-GWP policies to focus on?
- Which customers do I prioritize for follow-ups in order to retain them?


Likelihood of Renew Policy Dashboard

The Likelihood of Renew Policy dashboard (Embedded) gives you insights into the policy renewal status of a specific customer. The dashboard charts answer these questions:

- How many policies are up for renewal for the customer?
- How many days are left for the customer to renew their policies?
- What's the GWP for policies that are up for renewal?
- What's the predicted renewal score for policies that are up for renewal?


Use Analytics for Retail Banking

Analytics for Retail Banking dashboards visualize all the metrics and key performance indicators (KPIs) personal bankers require to grow client relationships.

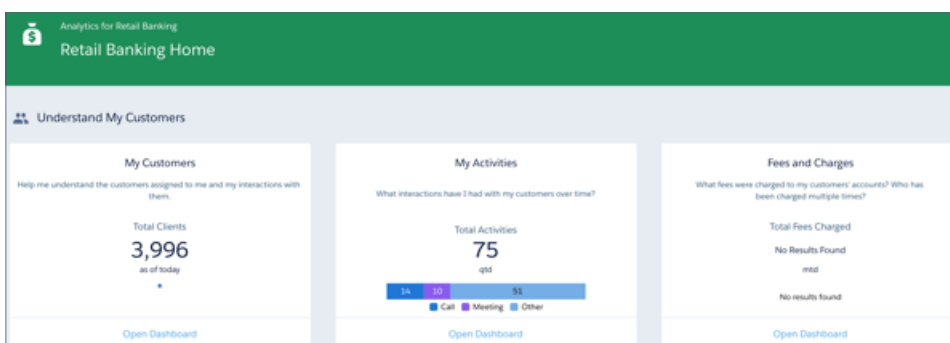
 **Note:** Analytics for Retail Banking is an open source app, and is not included as a part of CRM Analytics for Financial Services.

The app gives branch managers and retail bankers full visibility into customers, deposits, leads, referrals, and branch activity. Regional managers and personal bankers can also take advantage of insights from the dashboards to increase loans and deposits as well as customer satisfaction. Key performance indicators also help you build your retail banking business by increasing higher referral conversions, accelerating loan applications, and building customer retention.

To open the app:

1. From the app picker , select **CRM Analytics Studio** to open the CRM Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app to open it. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.
4. Click **Run App**. The app opens to the Retail Banking Home dashboard, which provides summary views of your customers, activities, and fees and charges.
5. Click the **Open Dashboard** links beneath each summary chart to see details.

 **Example:**



Analytics for Retail Banking Dashboard

[Analytics for Retail Banking Dashboards](#)

Analytics for Retail Banking dashboards give you insights into customers, deposits, leads, referrals, and branch activity.

[Use the Retail Banking Customer Churn Prediction Dashboards](#)

Identify and take steps to retain customers who are likely to churn. View details of customers with churn scores that indicate they need your attention. Profile customers who need your immediate attention by profiling the customers.

Analytics for Retail Banking Dashboards

Analytics for Retail Banking dashboards give you insights into customers, deposits, leads, referrals, and branch activity.

You can access the Analytics for Retail Banking app and its dashboards through CRM Analytics Studio.

Retail Banking Home Dashboard

The Retail Banking Home dashboard gives you a summary of KPIs about your customers. You can see the count of customers, the number of activities associated with the customers, and the total value of fees charged to the customers.

My Customers Dashboard

The My Customers dashboard identifies the customers who need your attention. The dashboards answer these questions:

Who needs my attention?

Indicates customers who are at risk of attrition by showing how much the customers withdraw and how many cases are associated with the customers' accounts.

Who are my top customers?

Breaks out customers by the value of their deposits and the length of the customers' association with your company.

What demographics do I serve?

Segments your customers by market segment, such as net worth and sex, category (level of service, such as gold and silver), and age.

My Activities Dashboard

The My Activities dashboard tracks your activities and evaluates the value of your work on behalf of clients by using the metrics on the dashboard's two pages. The dashboards answer these questions:

Who am I spending my time with?

Shows total activities, total calls, emails, and other actions. Also shows how you balance your time between low- and high-value clients and the purposes of your actions.

What am I spending my time doing?

Shows the count of your activities over time for the past two years.

Fees and Charges Dashboard

The Fees and Charges dashboard shows details about the fees charged to your clients. You can use filters to sort metrics by banker, fee types, reversed fees, fee amounts, and period. The dashboards answer these questions:

What fees were charged?

Shows the amount charged as fees over time and the fee amount that was reversed based on selected filters.

Which customers were charged?

Shows the type of customers who paid the most fees based on the balance size and how many times the customers were charged. You can also see the total balance, fee amounts, and percent of reversed fees for each client.

Customer Acquisition Dashboard

The Customer Acquisition dashboard provides input about the clients who need attention by reviewing client accounts according to activity level, age, and expected value. Use filters to look at client accounts according to banker, record type, status, rating, and source. The dashboards answer these questions:

What's the source of the lead or referral?

See the sources of your leads, such as partner referral and phone inquiry. Also learn about your best referrers so that you can focus on promising leads.

What's the status of leads or referrals?

Learn the status of leads that started on a selected date.

What's the overall lead conversion rate and processing time?

Focus on a single banker by setting the Banker Name filter.

What's the trend in Lead Pipeline ?

Visualize your lead pipeline for a selected period. Includes beginning and end lead totals, and the number of leads added, converted, and disqualified.

My Referrals Dashboard

The My Referrals dashboard gives insights into how you can increase referral conversion. Find out how your referrals impact the business by learning the referral's conversion rate and the amounts of balances and loans coming from the referrals. Also find out which recipients of your referrals are most likely to convert the referrals.

Branch Management Dashboard

The Branch Management dashboard provides a comprehensive view of your employees' activities at different branches. From this dashboard, you see the clients, the total balance, the lead conversion, and the closed wins for employees at all your branch locations. These insights can be used to improve branch operations and see how the expertise of employees is distributed across branches.

Branch Unit Related Record Analysis Dashboard

The Branch Unit Related Record Analysis dashboard provides insights to identify the branches and bankers who create the maximum and minimum leads and opportunities. You can get the branch-wise count of records created or updated, the count of records in each category, the reasons for the update, and the leader-boards that identify the top-performing bankers and branches. Use these insights to quickly identify the branches with a high volume of activity and to plan your resources accordingly.

Interest Tags Dashboard

The Interest Tags dashboard provides insights into your customers' area of interest by analyzing the interest tags associated with the customers in each category and segment. You can identify the most popular interest tag selected by customers in each category or quickly note the unique interests of your high-value customers. By using these data-driven insights, you can personalize the marketing campaigns, offers, and customer interactions and build better relationships with your customers.

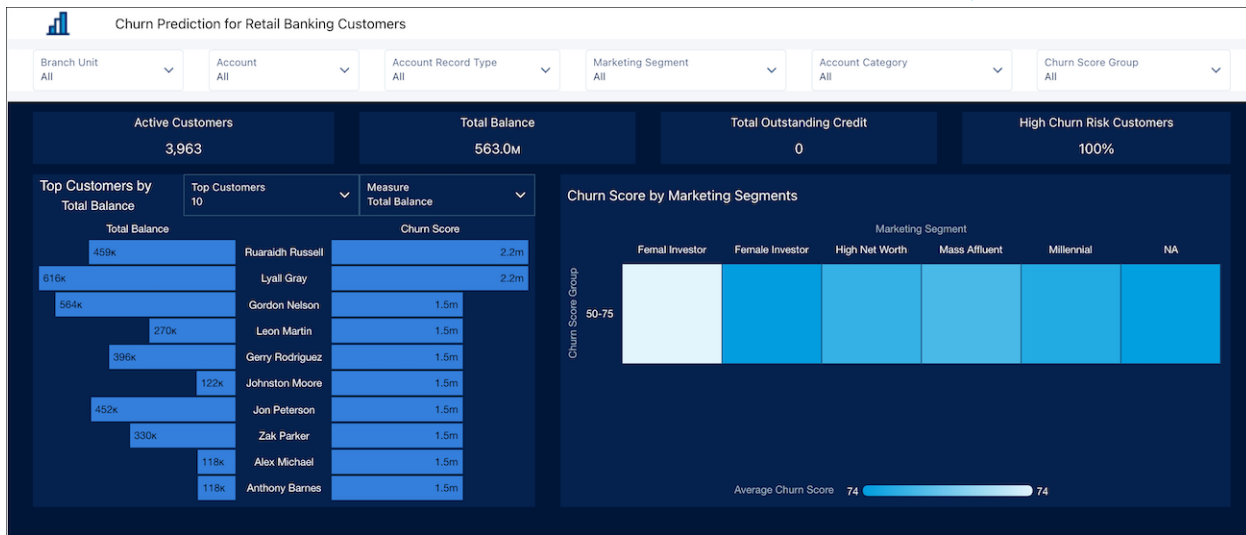
Use the Retail Banking Customer Churn Prediction Dashboards

Identify and take steps to retain customers who are likely to churn. View details of customers with churn scores that indicate they need your attention. Profile customers who need your immediate attention by profiling the customers.

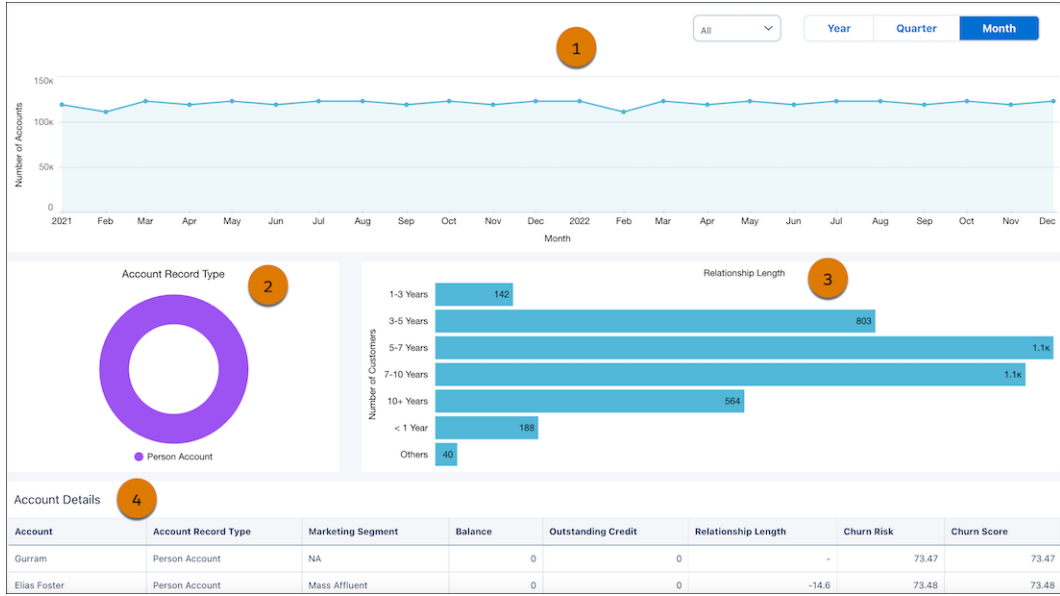
EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license

The Churn Prediction for Retail Banking Customers Dashboard



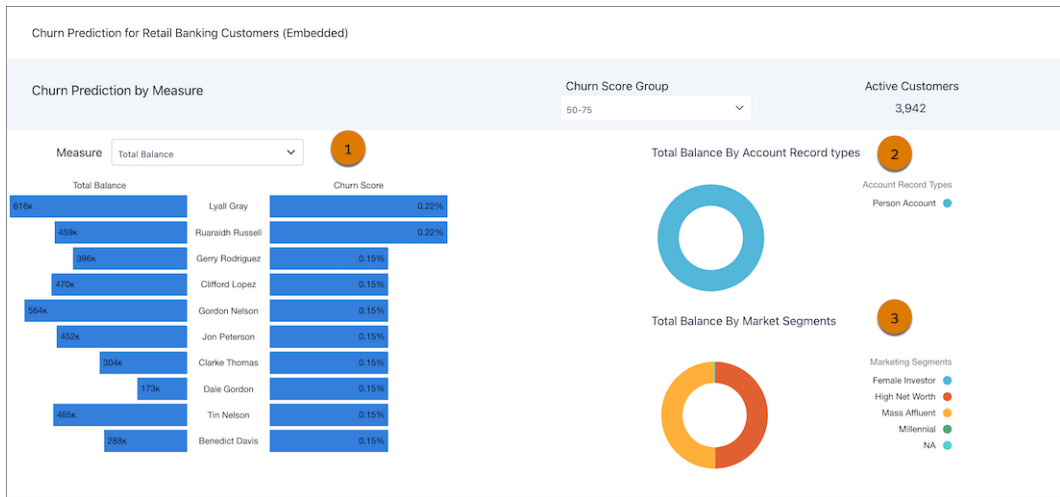
See predicted churn details of Retail Banking customers. Set the filters to see customers who are at risk of churn for each branch unit, account, account record type, marketing segment, and account category. View prediction results for each churn score group. Quickly learn about top customers, customers with low balances, or customers with high outstanding credits who are likely to churn.



- The chart (1) shows yearly, quarterly, or monthly analysis of existing accounts.
- The chart (2) shows accounts based on record type. Use the chart to prioritize the type of accounts that need your attention. To see details of a record type in the next chart, click a sector in the chart.
- The chart (3) shows accounts based on the length of the account's relationship with the company. Use the chart to prioritize customers who need your attention.
- The table (4) shows customer details.

The Churn Prediction for Retail Banking Customers (Embedded) Dashboard

See predicted churn details of Retail Banking customers. Set filters to see customers with low balances or high outstanding credits who are likely to churn. View prediction results for each churn score group. This dashboard can be embedded on Lightning record pages.



- The chart (1) shows churn scores based on account balance or outstanding credit.
- The chart (2) shows accounts based on record type. Use the chart to prioritize the type of accounts that need your attention.


- The chart (3) shows accounts based on marketing segment. Use the chart to prioritize marketing segments that need your attention.

SEE ALSO:


[Financial Services Cloud Administrator Guide: Reduce Churn of Retail Banking Customers](#)

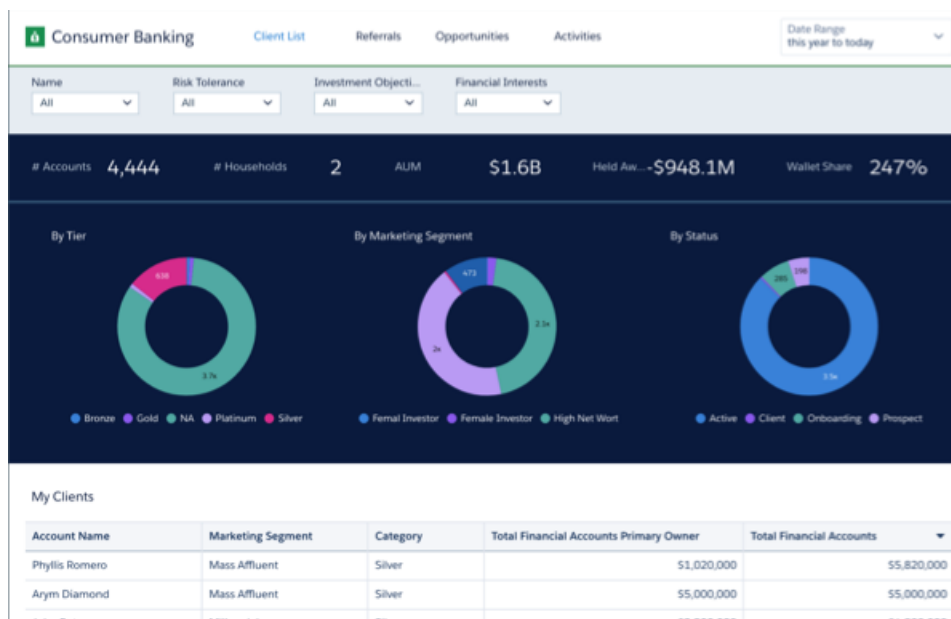
Use Consumer Banking Starter Analytics

The Consumer Banking Starter Analytics gets you started with a dashboard personal bankers can use to move clients up the value chain.

-  **Note:** Consumer Banking Starter Analytics is included with CRM Analytics for Financial Services, which is available at an extra charge for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license. See [Deploy CRM Analytics for Financial Services](#) for complete deployment instructions.

The Consumer Banking Starter Analytics app helps personal bankers grow assets under management (AUM) and cross-sell financial services products. Visualizations include client AUM, held away, and market share. You also get insight into referrals and opportunities to help start new relationships.

- From the app picker , select **Analytics Studio** to open the CRM Analytics home page.
- Under **Browse** in the left column, select **All Items**.
- Select the **Apps** tab, then click Consumer Banking Starter Analytics. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.




The app's Consumer Banking dashboard opens to the Client List page. View the other pages by clicking the links across the top.

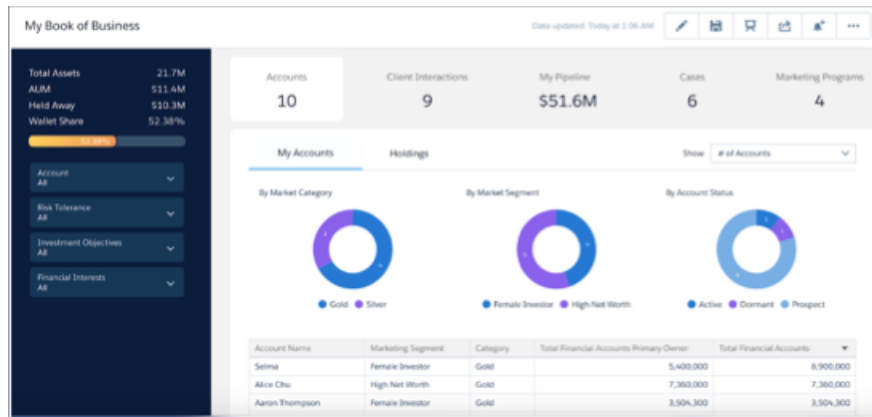
- Client List.** Use this page to segment your client list according to key characteristics. View client market segments (high net worth, gender, and so on) and the status of their relationships (active, prospect, dormant, and so on). You can also filter by individual client, their risk tolerance, investment objectives, and financial interests. And view details about each of your clients, including the total value of their financial accounts.

- **Referrals.** Shows status of referrals over time, including the number created and converted, conversion rate, and the revenue generated. You can also see if referrals have been contacted and if they're close to converting to client status. Also, view the types of services clients say they're interested in.
- **Opportunities.** Use the metrics on this page to see the total pipeline value, closed won and lost business, and win rate. Also, see details for each opportunity, including stage, amount, and forecast category.
- **Activities.** See breakdowns of your team's activities. View metrics for activities according to their purpose (client retention, onboarding, and prospecting) and type (such as call, meeting, email). Also see activities for each account

Use Wealth Starter Analytics


The Wealth Starter Analytics app helps financial advisors get started fast analyzing the success of your financial services business.

-  **Note:** Wealth Starter Analytics is included with CRM Analytics for Financial Services, which is available at an extra charge for customers with Financial Services Cloud Basic or Standard licenses and the FSCAnalyticsPlus (CRM Analytics for Financial Services) license. See [Deploy CRM Analytics for Financial Services](#) for complete deployment instructions.



The app dashboard's prebuilt visualizations provides actionable insights to help you deepen client relationships and increase assets under management (AUM). Align your actions with current client goals, engage new clients using the proper channels, and segment clients so you can provide personalized services to them.

Open the app.

1. From the app picker , select **CRM Analytics Studio** to open the CRM Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app to open it. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.


The app opens to its My Book of Business dashboard, which shows a wealth of data visualizations about your business interactions. Summary metrics include Total Assets, AUM, Held Away, and Wallet Share. Filter them by account, risk tolerance, investments objectives, and financial interests. The dashboard includes five views, each of them letting you dig deep into your business metrics:

- **Accounts** (shown). Toggle between accounts and holdings. View accounts by market category, segment, and status.
- **Client Interactions.** View activities and engagements by status and type as well as according to whether they're completed or upcoming. Also see if interactions relate to onboarding, retention, or prospecting.

- **My Pipeline.** View the pipeline by stage and forecast category and see list of all opportunities. Also review forecast, win rate, and closed won business.
- **Cases.** View case status as well accounts with cases according to AUM and days since case creation.
- **Marketing Programs.** View campaigns sorted by value or size, type, and status. Also see list of campaign members and clients and prospects to campaigns.

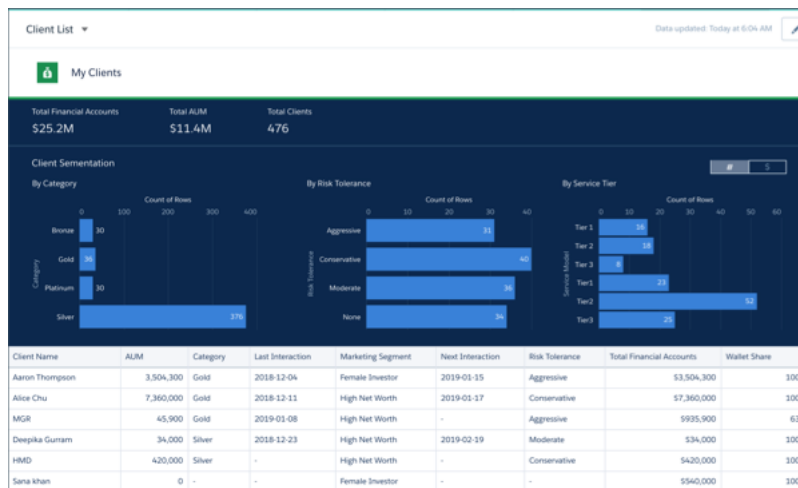
Use the Client Segmentation App


Client Segmentation App dashboards help you gain insights across your book of business to deepen client relations. It's enabled by a license that provides restricted access to Tableau CRM features.

-  **Note:** Administrators can set up your org with Client Segmentation App by following the steps in [Deploy the Client Segmentation App](#).


EDITIONS

Available in: **Enterprise** and **Unlimited** Editions



-  **Important:** If the Financial Services Cloud – Einstein Analytics managed package was installed in your org before February 8, 2019: view the dashboards described here through the Financial Services Cloud Advisor Analytics tab. The tab will remain available until June 30, 2019. Customers are advised to work with their Salesforce administrators to remove the tab before then. See “Personalize the Navigation Bar in Lightning Experience” in Salesforce Help. **Client Segmentation App replaces the dashboards formerly available through the Financial Services Cloud Advisor Analytics tab.**


Open the app.


1. From the app picker , select **CRM Analytics Studio** to open the CRM Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app to open it. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.

Each dashboard provides a different focus on your book of business. Dashboards are listed in alphabetical order here. They may not appear in the same order in your org.

- **Activities.** See how activities are impacting your client relationships by analyzing interactions in the context of different activity types. Identify gaps and opportunities to improve future engagement.

- **Client Goals.** Measure client goals by spotting key trends. Create tasks or opportunities in context to client data to help keep clients on track.
- **Client List.** Get a focused list of clients with robust filtering capabilities that surface financial data points and account details.
- **80/20.** Maximize your time by comparing client revenue against advising activities and identify key actions for high-potential clients.
- **Financial Accounts.** Respond to market conditions in a timely manner by uncovering the types of financial accounts and securities that make up your book of business.

 **Note:** Use of this app is covered by a restricted usage license that gives you limited use of the CRM Analytics platform. See “Analytics Limitations” in Salesforce Help to learn more. Financial Services Cloud customers who installed the Einstein Analytics for Financial Services Cloud package will have access to Client Segmentation dashboards. We have retired the name *Einstein Analytics for Financial Services Cloud*.

 **Note:** For usage restrictions that apply to this product, see [this document](#).

Use the Client Segmentation App to filter and segment your client lists. You can't use the Client Segmentation App to upload, access, or connect external data using the API.

The Client Segmentation App is available only in English.

SEE ALSO:

[CRM Analytics Limitations](#)

Use the Product Recommendation Dashboards

Get product recommendations for customers who are most likely to buy your products.

[Use the Advanced Product Recommendation Dashboards](#)

Get product recommendations for customers who are most likely to buy your products. View customers whose predicted product purchase scores indicate the need your attention. Prioritize the customers who need your immediate attention by profiling the customers. The predictions are based on existing snapshot data in Salesforce.

[Use the Basic AI Product Recommendations Dashboards](#)

Get product recommendations for customers who are most likely to buy your products. Prioritize customers who need your immediate attention by profiling the customers. The predictions are created by using clustering transformation.

EDITIONS

Available in: **Professional, Enterprise, and Unlimited** editions with the Revenue Intelligence for Financial Services license

Use the Advanced Product Recommendation Dashboards

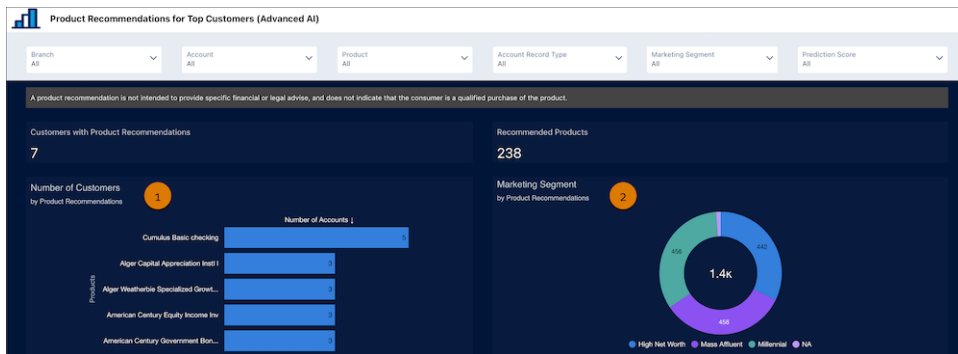
Get product recommendations for customers who are most likely to buy your products. View customers whose predicted product purchase scores indicate the need your attention. Prioritize the customers who need your immediate attention by profiling the customers. The predictions are based on existing snapshot data in Salesforce.

EDITIONS

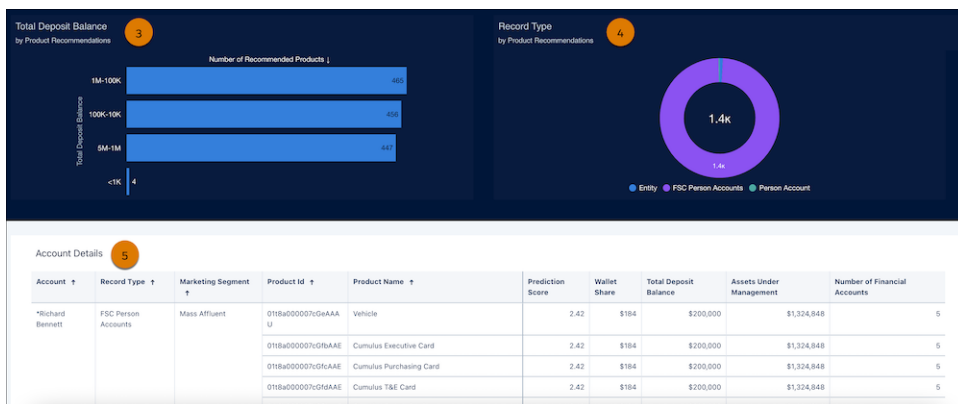
Available in: **Professional, Enterprise, and Unlimited** editions with the Revenue Intelligence for Financial Services license

The Product Recommendations for Top Customers (Advanced AI) Dashboard

See product recommendations for your top customers based on their predicted product purchase scores. Set filters to see the products recommended for each branch, account, account record type, marketing segment, and predicted product purchase score. View the products recommended based on the number of related accounts and for each marketing segment.



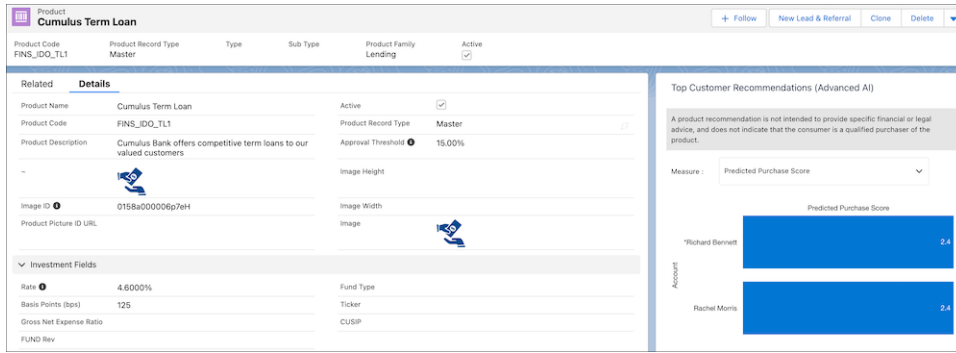
- The chart (1) shows the number of customers likely to buy each recommended product.
- The chart (2) shows the recommended products based on the marketing segment.



- The chart (3) shows the recommended products based on deposit balance.
- The chart (4) shows the recommended products for each record type. To see the deposit balance for a record type in the next chart, click a sector.
- The table (5) shows customer details.

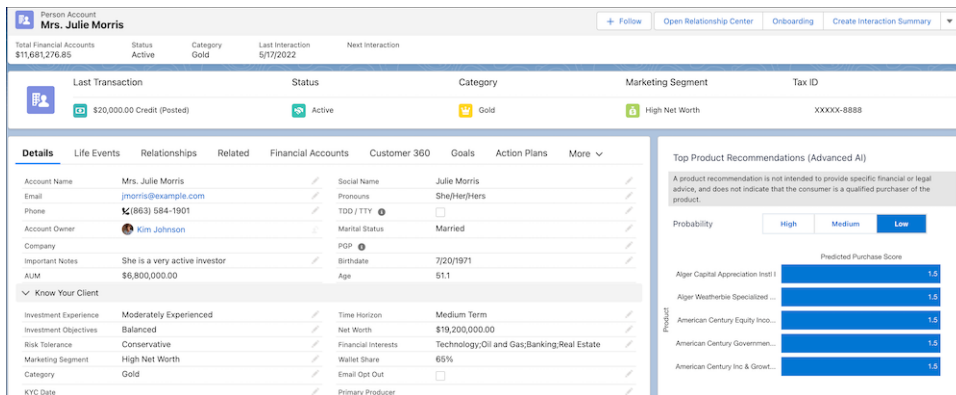
The Top Customer Recommendations (Advanced AI) Dashboard

To see customers who are likely to buy a product, embed this dashboard on the product’s record page. View the prediction data based on the predicted product purchase score of an account.



The Top Product Recommendations (Advanced AI) Dashboard

To see a list of recommended products for an account, embed this dashboard on the account's record page. View the recommended products based on the probability of purchase.



SEE ALSO:

[Financial Services Cloud Administrator Guide: Create an App to Recommend Products with Snapshot Data](#)

Use the Basic AI Product Recommendations Dashboards

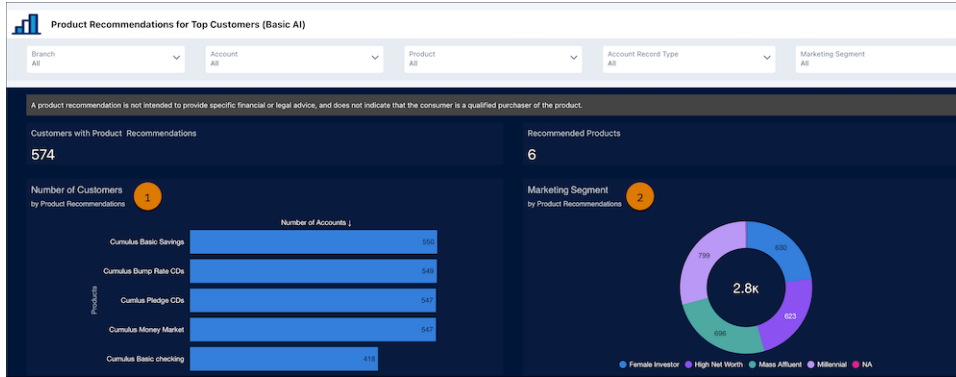
Get product recommendations for customers who are most likely to buy your products. Prioritize customers who need your immediate attention by profiling the customers. The predictions are created by using clustering transformation.

The Product Recommendations for Top Customers (Basic AI) Dashboard

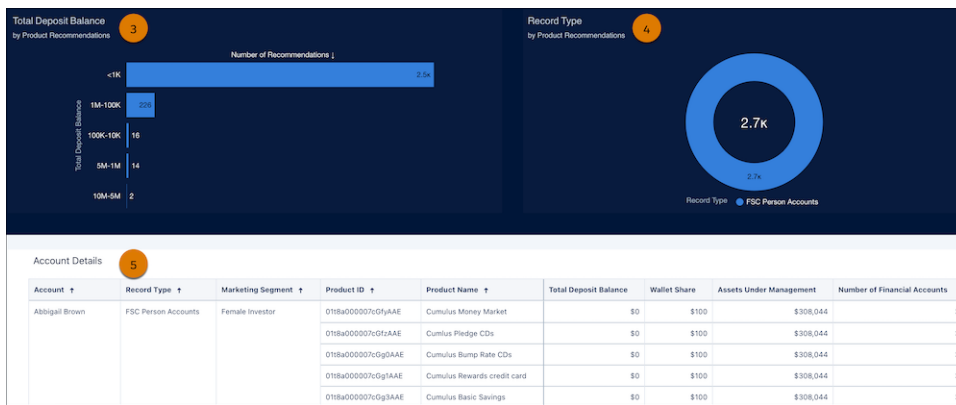
See recommended products for top customers. Set filters to see the recommended products for each branch, account, account record type, and marketing segment. View recommended products based on the number of related accounts and for each marketing segment.

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** editions with the Revenue Intelligence for Financial Services license



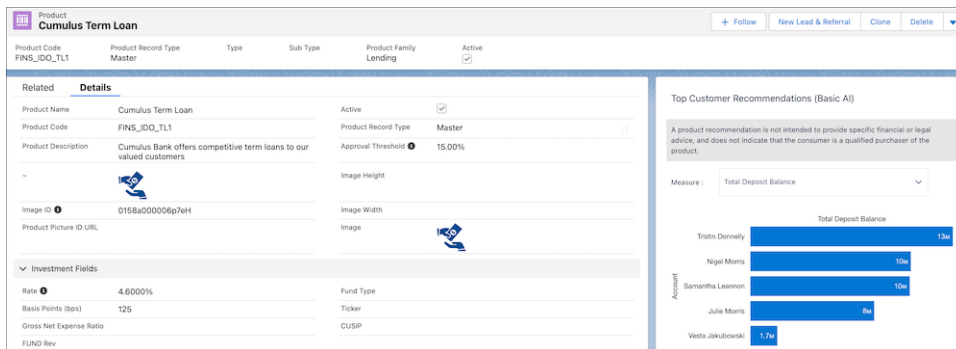
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- The chart (2) shows the recommended products based on the marketing segment.



- The chart (3) shows the recommended products based on deposit balance.
- The chart (4) shows the recommended products for each record type. To see the deposit balance for a record type in the next chart, click a sector.
- The table (5) shows customer details.

The Top Customer Recommendations (Basic AI) Dashboard

To see customers who are likely to buy a product, embed this dashboard on the product's record page. Set filters to see prediction data based on the customers' deposit balance, the wallet share, the assets under management, and the number of related financial accounts.



The Top Product Recommendations (Basic AI) Dashboard

To see a list of recommended products for an account, embed this dashboard on the account's record page.

The screenshot displays a CRM Analytics dashboard for a person account named Mrs. Julie Morris. The dashboard is divided into several sections:

- Account Summary:** Shows Total Financial Accounts (\$11,681,276.85), Status (Active), Category (Gold), Last Interaction (5/17/2022), and Next Interaction.
- Key Metrics:** Last Transaction (\$20,000.00 Credit (Posted)), Status (Active), Category (Gold), Marketing Segment (High Net Worth), and Tax ID (XXXXX-8888).
- Details Section:** A grid of fields including Account Name, Email, Phone, Account Owner, Company, Important Notes, AUM, Social Name, Pronouns, TDD / TTY, Marital Status, POP, Birthdate, Age, Time Horizon, Net Worth, Financial Interests, Wallet Share, Email Opt Out, Primary Producer, and KYC Status.
- Top Product Recommendations (Basic AI):** A sidebar on the right containing a disclaimer and a list of recommended products: Cumulus Rewards credit card, Cumulus Basic checking, Cumulus Pledge CDs, Cumulus Money Market, and Cumulus Basic Savings.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Create an App to Recommend Products with Clustering Transformation](#)