

LEARNING SOLUTIONS

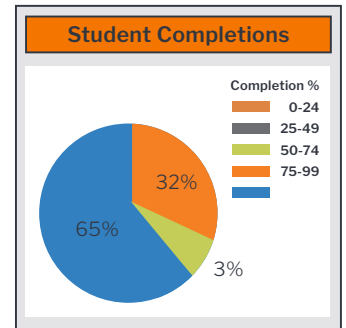
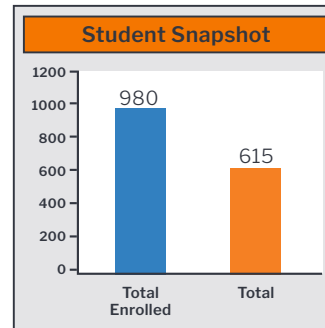
Manager Tracking

Tracking Candidates on their Path to Success

Your candidates' prelicensing performance is essential on their path to becoming a licensed agent. Our Manager Tracking platform allows you the flexibility of monitoring individual study progression all from one place.

Manager Dashboard

Our Manager Dashboard brings each learners' progress to life, giving you a snapshot view of candidate progress. Real-time dashboards increase transparency and accountability, helping motivate your team. If you are monitoring the performance of a team of managers, we can help by providing team overviews for increased visibility. You can easily compare which managers are enrolling, how many of their learners are actively engaged in their training and the overall percentage of who has successfully completed their studies – for each of your management teams. Candidates will be prepared quicker and start producing in no time.



Custom Reports

Our custom reporting allows you to select which metrics are most important to you and your firm. Design and download your reports at any time.

Step 1 - Select Filters:

StudentDetail
 ManagerSummary

Managers:

Ctrl + Click to select multiple names

Registration Date:
Start: 12/13/2016 | End: 03/13/2017

Students studying for:

Select All
 Health
 Life
 Life & Health
 Code & Ethics

Student status:

Select All
 Active
 inactive

Student progress:

Select All
 Superior (Green)
 On Track (Blue)
 AI Risk (Red)

Step 2 - Select Output:

Manager Info:

Select All
 First Name
 Last Name
 Phone
 Email

Student Info:

Select All
 First Name
 Last Name
 Resident Address
 Resident City
 Resident State
 Resident Zip
 Phone
 Email

Course Info:

Select All
 Course Name
 Student Status
 Student Progress
 Last Access Date
 Usage
 Best SYE Score
 Average SYE Score
 Latest SYE Score
 Best Guaranteed Exam Score
 Registration date

Automated Emails

We also give you the option to receive daily summary emails of your candidates' study activity. With one glance, you are provided with enough information to know if your candidates are ready to take their exam. Want to know who is struggling? See instantly which candidate might be in danger by using our easy to view color-coding method.

Manager	State	Enrolled Last 30 Days	Active Last 10 Days	Total Students	% Complete
John Doe	CA	10	17	19	53%

Name	Phone	Email	State	Exam	% Complete	Chapters	First Log On	Last Log On	Time In Course	Best Practice Exam	Pass Guarantee Exam	Test Ready?
John Doe			CA	Life and Health	100 %	16 of 16	01/18/2017	03/02/2017	47:32	62	N/A	N
John Doe			CA	Code & Ethics	100 %	7 of 7	01/28/2017	03/01/2017	18:17	50	N/A	N
John Doe			CA	Code & Ethics	100 %	7 of 7	02/23/2017	03/06/2017	13:31	76	N/A	N



Need to enroll a candidate? Manager Tracking accounts include a simplified registration feature designed to ensure your candidate gets immediate access to their accounts.