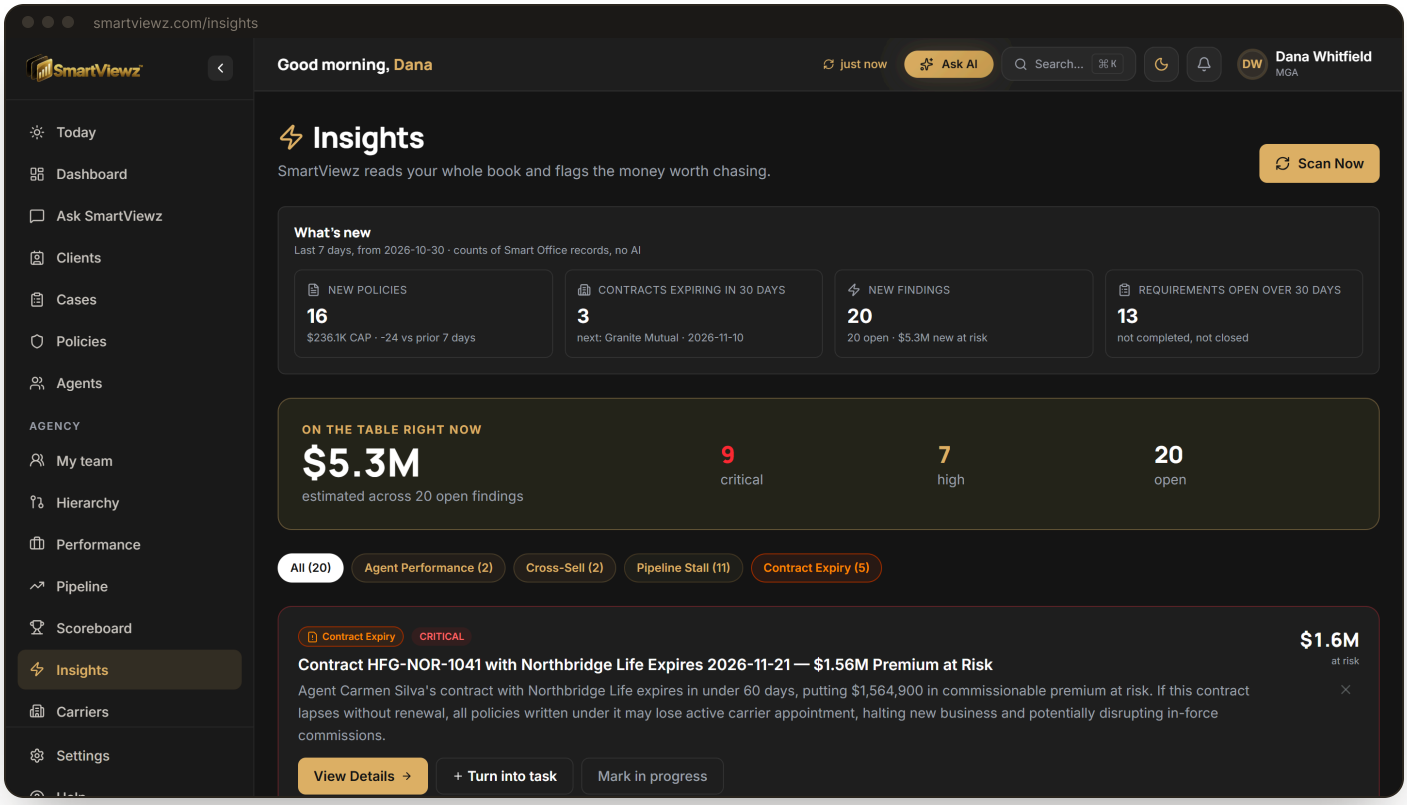
Your whole agency, rolled up.

Org-wide production, revenue at risk with a dollar figure, and every producer ranked, refreshed from Smart Office automatically.

FLAGGED THIS MORNING	WEIGHTED PRODUCTION	PRODUCING AGENTS	TOP PRODUCER
$5.3M	**$5.1M**	**56**	**$416,604**
across 20 findings	year to date	ranked on the scoreboard	weighted, YTD



$ Money the AI found

Expiring contracts, stalled cases and cross-sell openings, each with a dollar figure and next step.

Scoreboard

Leaderboards for the agency or any branch, with progress to goal.

↗ Performance

Production by agent, carrier and product, with trends over time.

Screens and figures: Harborline Financial demo office (sample data).

See your agency rolled up.

See it on a real sample agency, then set it up on your own book in one call.

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TRY THE DEMO

GET STARTED