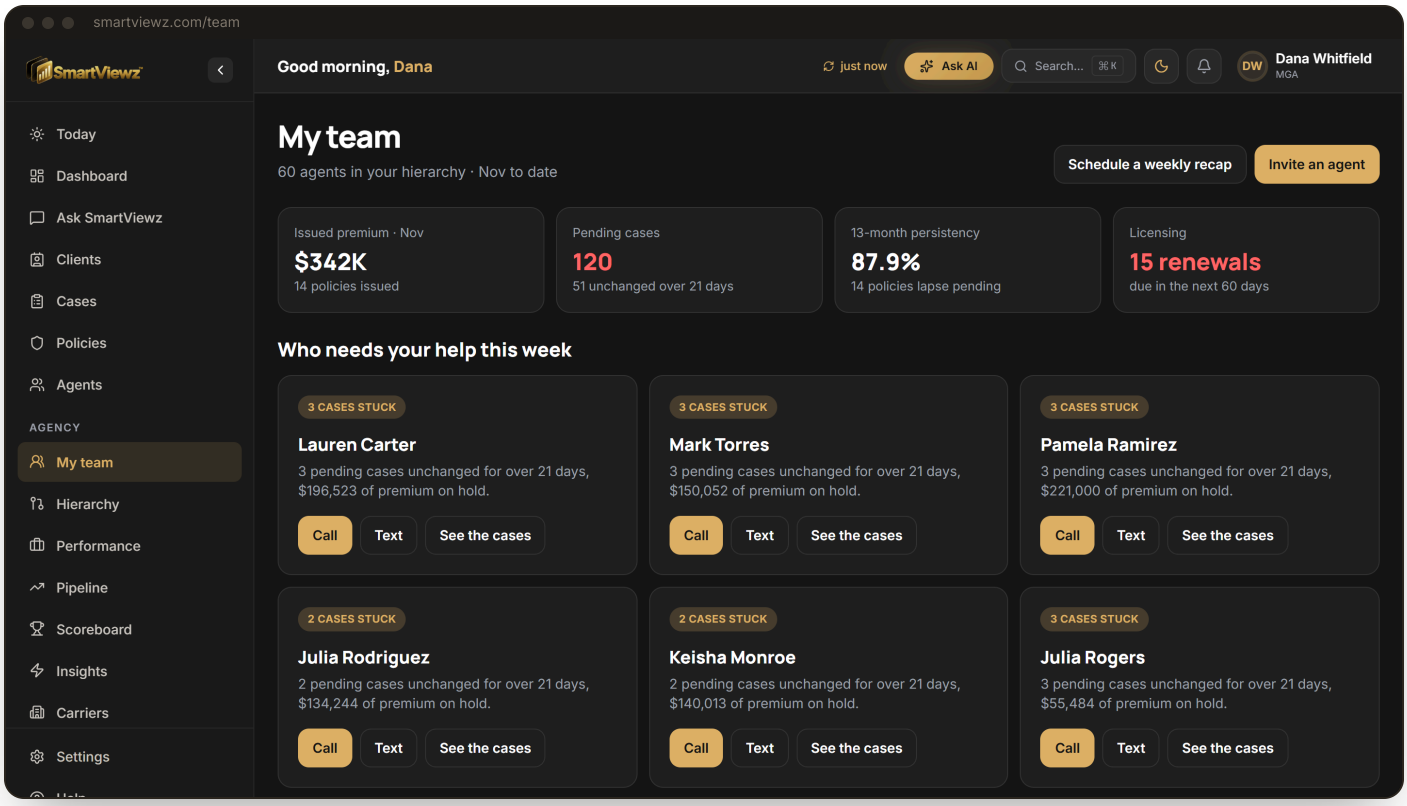
04 · FOR SUPERVISORS · MY TEAM

Know who on your team needs a hand this week.

Stuck cases, quiet agents and licenses coming due across your whole downline, with production rolled up at every level of the hierarchy.

YOUR HIERARCHY	ISSUED PREMIUM	13-MONTH PERSISTENCY	LICENSING
60 agents	**$342K**	**87.9%**	**15 renewals**
production rolled up	this month	across the team	due in 60 days



Who needs your help

Agents with stuck cases and premium on hold, sorted by who needs you most.

Your org chart

Click any branch to see that part of the downline and how it's producing.

Meeting prep

A one-page brief on any agent before you sit down with them.

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

Run your team from one screen.

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

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