Manager Dashboard Summary

Managers can see the aggregate activity for their office through the Manager Dashboard in Moxi Engage. The dashboard enables the manager to quickly ascertain an agent's status, number of transactions in the pipeline for their office, and the percentage reached of the office GCI Goal. Select an agent to review their progress and provide a targeted and productive coaching session.

| | | ard | | | | | | Office 1 - |
|---|---------------------------|------------|-------------------|---------|--|---------------------------------------|--|----------------------|
| Goals | VIEV | w | Sales | Flow | | | | |
| 519 | % | | Marke | ting | Prospects | Actives | Pending | |
| | | | 29 |)1 | - 303 | 7 - 165 | 5 - 45 | |
| A % 🔍 | s C | - 11 | | ÷ | | - | | |
| Transactions Avg. Size | e Avg. Rate | <u>ы</u> Ш | | | 3037 people | 165 people | 45 people | |
| Transactions Avg. Size 128 \$4.1M | | | | | 3037 people 3309 transacti | | | ons |
| 128 \$4.1M | | | | | | | | ons |
| 128 \$4.1N | | | | | | | | e |
| 128 \$4.1M | | Pro | ospects \$ | Actives | 3309 transacti | | tions 48 transactions | ons E Status + |
| 128 \$4.1M B Agents | И 98% В | | ospects ÷ 2610 | | 3309 transacti | ons 200 transac | 48 transaction | G |
| 128 \$4.11 B Agents | A 98% B Marketing ≑ | | | | 3309 transacti | Ons 200 transac | 48 transactions 48 transaction | G |
| 128 \$4.11 B Agents Amme - Autobot1 Agent | B Marketing = 221 | > | 2610 | 147 | Sage Pending Part Sage Pending Sage Pending | 200 transac GCI + 522.2M (285%) | 48 transactic D Subscribers NN = 842 | G |

- 1. **AGENT:** This is a complete list of all your agents in your office and an indicator of how well they are doing.
 - **GREEN:** On track to meeting their goal
 - YELLOW: Close to being on track to meeting their goal
 - **RED:** Not on track to meeting their goal
 - **NO COLOR:** Your agent has not set a GCI goal and, therefore, not started using Moxi Engage.
 - a. NAME: Find all of the agents in your office listed here.
 - b. **THE SALES FLOW:** This is how many people are in each section of the sales flow for each one of your people!
 - c. GCI: See how close each of your agents are to reaching their annual GCI goal!
 - d. **SUBSCRIBERS NN:** This is how many people your agent has subscribed to neighborhood news.
 - e. **STATUS:** Quickly ascertain your agents progress by checking the color of the dot next to their name.
- 2. **GOALS:** Remember that Gross Commission Income (GCI) goals we asked your agents to enter? Here's where you keep track of every agents' goal collectively.
 - a. Transactions: This is the total number of transactions closed by agents in your office.
 - b. Avg Size: This is the average dollar amount from agents' closings.
 - c. Avg Rate: This is the average close rate for all agents in your office.

- 3. SALES FLOW: Each Sales Flow zone is a milestone for agents' progress toward a successful transaction. The numbers listed in each zone let you see quickly the total number of transactions being worked in your office.
 - a. **NOTE:** Managers only see the totals for their office and not individual contacts. An agent's sphere is only viewable by that agent.