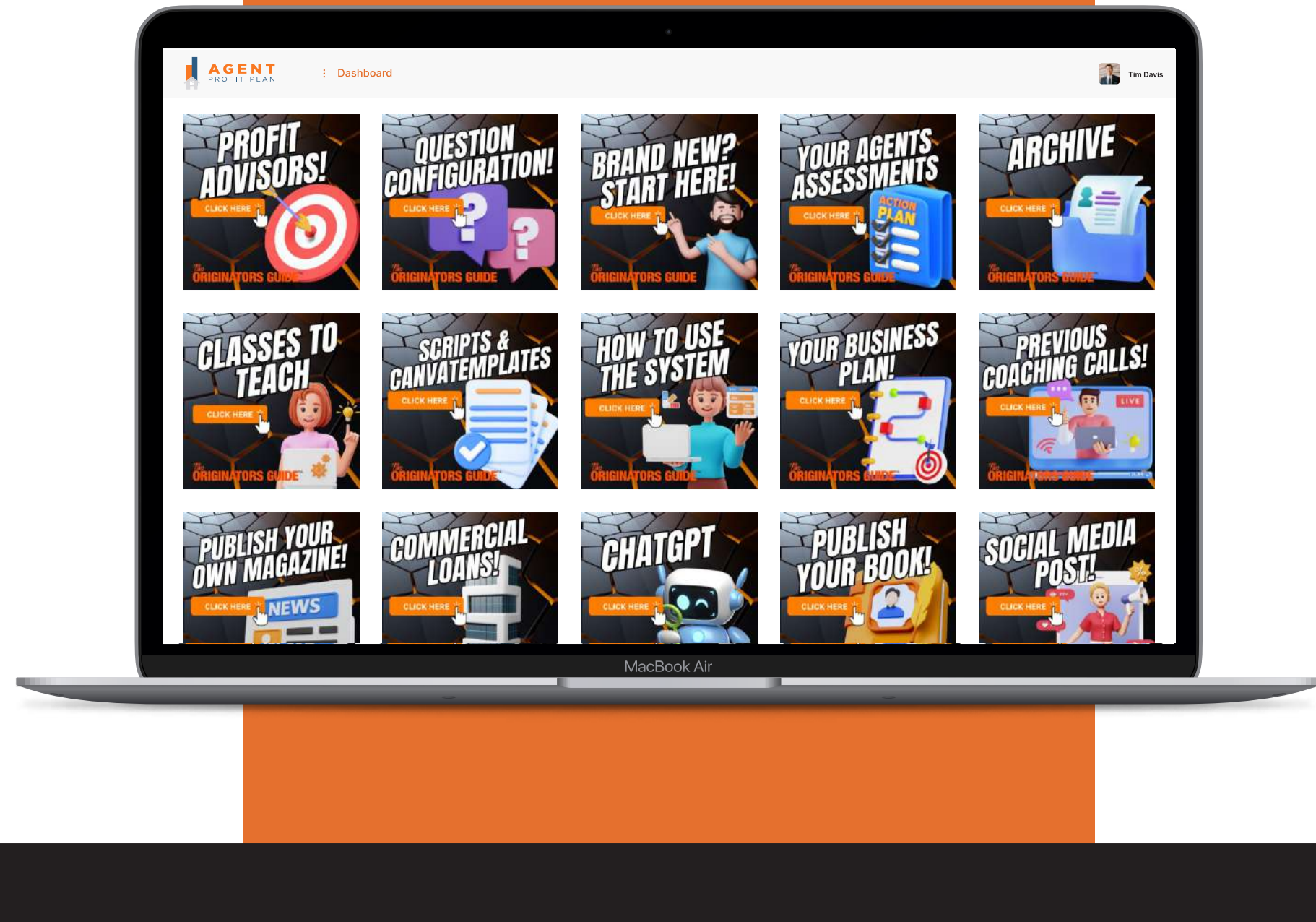




Empowerment | Coaching | Assessment



About The Project

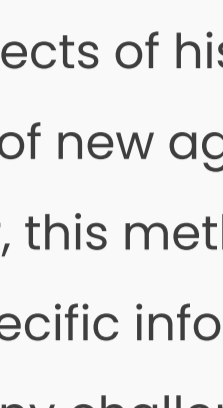
Agent profit plan is built for sales coach who helps loan officers/agents build their business aggressively and accurately. This application allows the admin to define questions with options with % weightage. Agents can sign up with basic details, and they can take assessments. During assessments, they can see real-time charts of progress and results. Admin can define questions category-wise and can re-arrange. After the assessment, the Agent will receive an email with a PDF of the question-answer and result. It also offers relevant training materials, call scripts, and demos for agents to learn from and enhance their skills. We have been working on this project for more than 6 months and we continue to add improvisations to it.



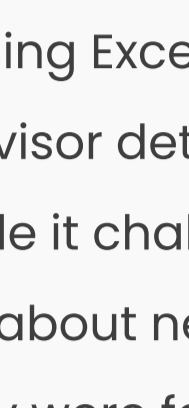
About the client

Tim, our esteemed client from Dallas, is a renowned figure in the mortgage industry, serves as a leader, speaker, and coach. Fueled by a passion for empowering loan officers, he navigated challenges to create the Agent Profit Plan. Seeking a streamlined solution, Tim aimed to connect loan advisors with agents for guidance, allowing him to efficiently oversee his business activities. Our collaboration centers on enhancing this innovative approach to benefit Tim's vision and overall business success.

Tech Stack



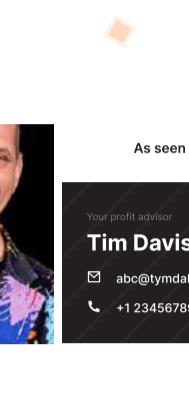
Angular



.Net Core



HTML

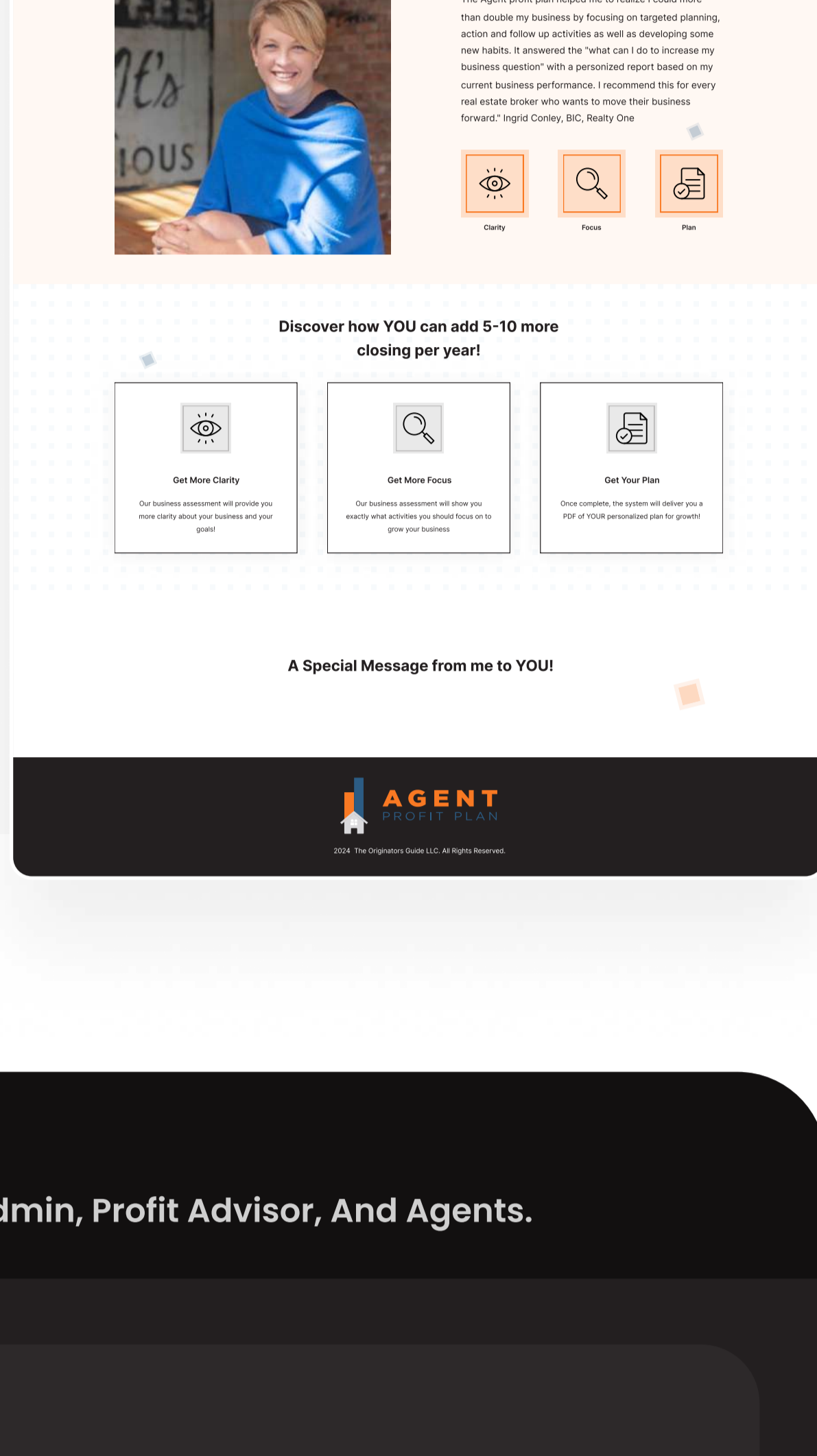


CSS

Challenges with Solution

Tim used to manage all aspects of his work using Excel sheets. This included keeping track of new agents, advisor details, and various other data. However, this method made it challenging for him to quickly access specific information about new agents, their revenue, and any challenges they were facing. Since agents worked under advisors, Tim didn't have direct contact with them, making it even more difficult to stay informed. To provide all the training materials and coaching materials to the advisors, Tim was using a variety of complicated and expensive software programs.

Recognizing Tim's struggle, we discussed his business needs and pain points. To address these issues, we introduced a solution called Agent Profit Plan. This tool simplifies Tim's workload, allowing him to effortlessly monitor and manage every aspect of his business. With the Agent Profit Plan, Tim can now enhance revenue and foster business growth without the hassle of navigating through multiple spreadsheets.



Modules

Agent profit plan has Three main Participants- Admin, Profit Advisor, And Agents.

Admin :

In the Agent Profit Plan, the admin holds complete control, empowering them to manage advisors and agents effortlessly. They have the authority to manage advisor and agent details effortlessly, including additions, edits, archiving, or deletions. Admins can facilitate agent training by adding courses, scripts, calls, and materials for coaching sessions while providing valuable guidance to Agents and Profit Advisors. With a simple click, Admins can monitor all advisor and agent activities through the Agent Profit Plan, ensuring a seamless and efficient workflow.

Profit Advisor :

Each advisor is allocated a personalized website URI, showcasing comprehensive details about the advisor. Upon signup, individuals become agents under the advisor. The advisor gains access to a dashboard that displays agent assessments, inquiries submitted by agents, and a repository of script materials, call records, and past calls. This agent profit plan module facilitates efficient tracking and management of agent activities for enhanced productivity and collaboration

Agents :

Agents can sign up using the URI provided by the Advisor, and they will have access to questions with suggestions in the Assessment, allowing them to give the assessment and view all of their previous assessments with results.

Features of Agent Profit Plan

Message Board

Question Configuration

Social Media Post

Agent Assessment

Publish Books and Magazines

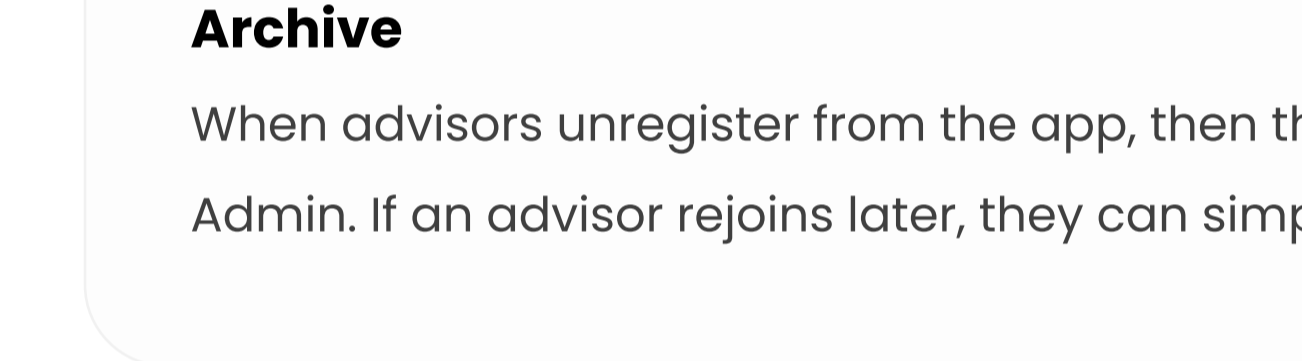
Agent Profit Plan Class and Commercial Loans

How to use Agent Profit Plan and Weekly Plan Success

Script and Canva Templates

Previous Coaching Calls and Chat Gpt

Guidance



Question Configuration

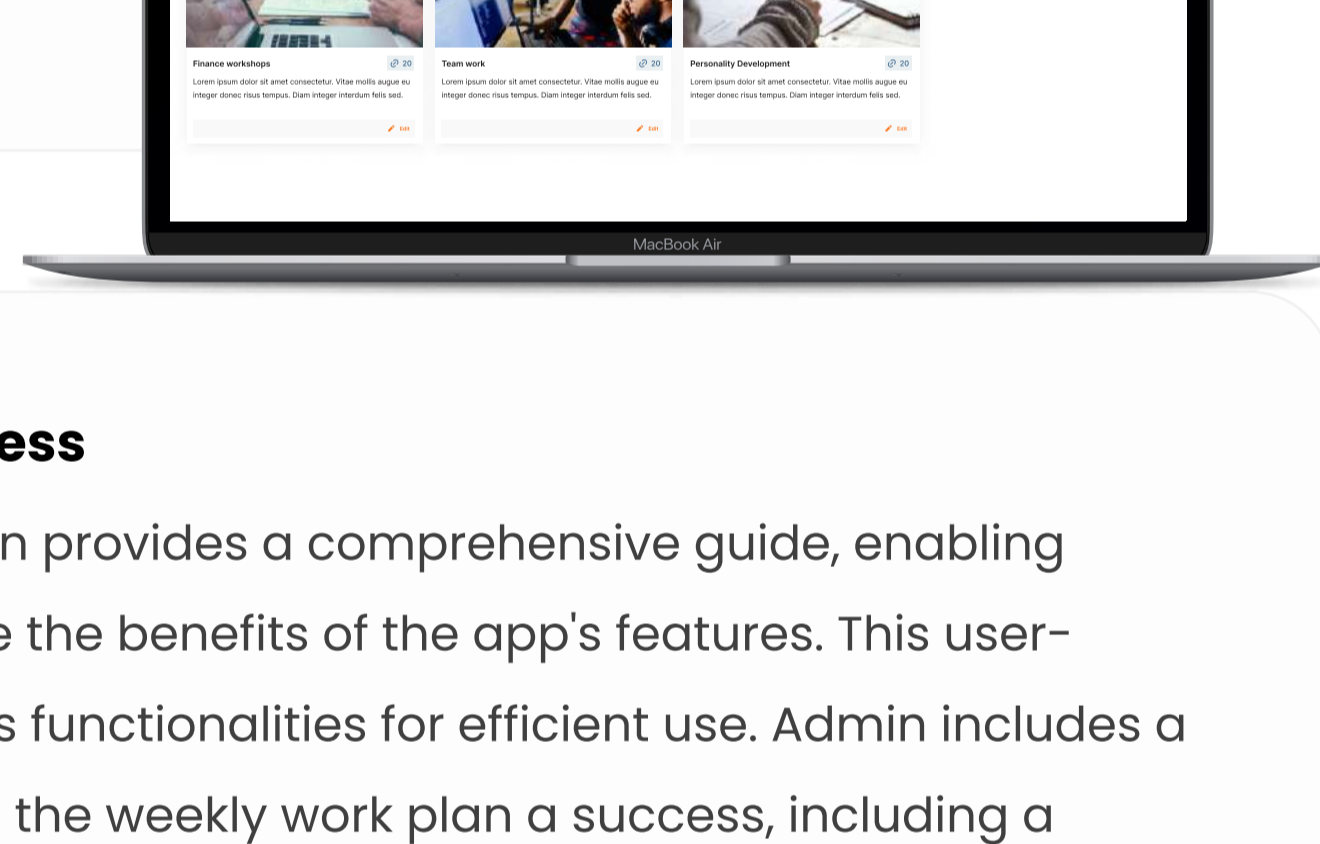
The question configuration feature in the Agent Profit Plan application provides a structured assessment test for agents. It includes topic-wise questions with helpful hints, aiding agents in their preparation. This feature is designed to streamline and enhance the assessment process, ensuring a comprehensive and effective evaluation.

Archive

When advisors unregister from the app, then they transfer to the archived list, which is only accessible by the Admin. If an advisor rejoins later, they can simply be unarchived for continued engagement.

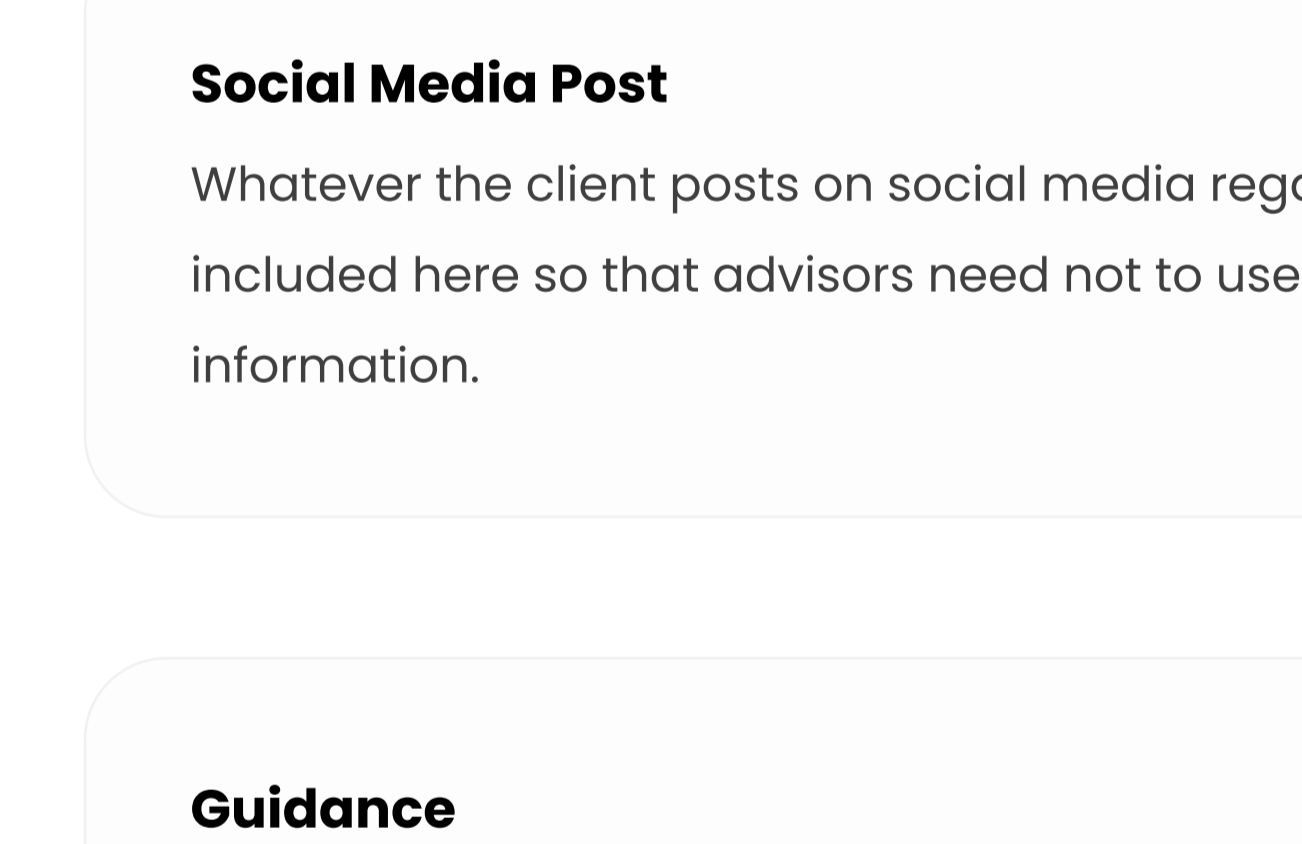
Agent profit plan class and commercial loans

The Agent Profit Plan app provides easy-to-follow courses chosen by the admin. Advisors can use these to train themselves, improve their skills, and make their businesses grow.



How to use agent profit plan and Weekly plan Success

The "How to Use" section in the Agent Profit Plan application provides a comprehensive guide, enabling agents and advisors to effortlessly navigate and maximize the benefits of the app's features. This user-friendly feature ensures a clear understanding of the app's functionalities for efficient use. Admin includes a weekly plan as well as all of the material required to make the weekly work plan a success, including a variety of files, PDFs, photos, videos, etc. and Advisors will be able to view all these files uploaded via admin.



Script and Canva Templates

The admin adds all the previous scripts and call data within the Agent Profit Plan application, facilitating a comprehensive resource for new Advisors to learn and enhance their skills.

Social Media Post

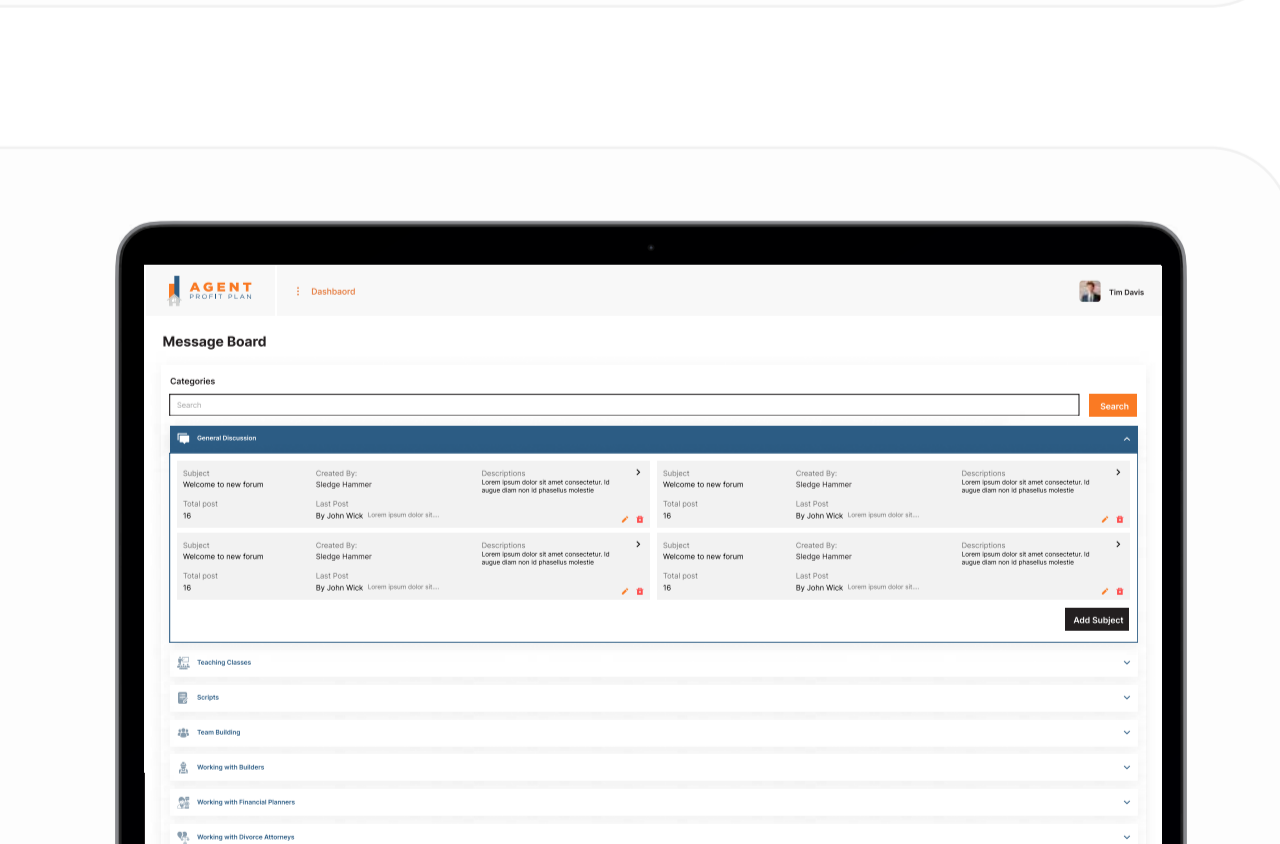
Whatever the client posts on social media regarding his work, the title, description and link data will be included here so that advisors need not to use any other platform to stay updated with the latest information.

Guidance

In the Agent Profit Plan application, agents can request guidance from the admin if needed. Upon receiving a request, the admin provides direct guidance, and the status of the agent, indicating whether guidance has been given or not, is updated on the application.

Previous Coaching calls and Chat Gpt

In this, one title had numerous sub-titles in which the client could easily put all the things relevant to one topic, like images, PDFs, videos, links, etc., which are provided to assist the advisors. These materials serve as a self-learning tool for advisors, facilitating skill development and enhancing their proficiency.

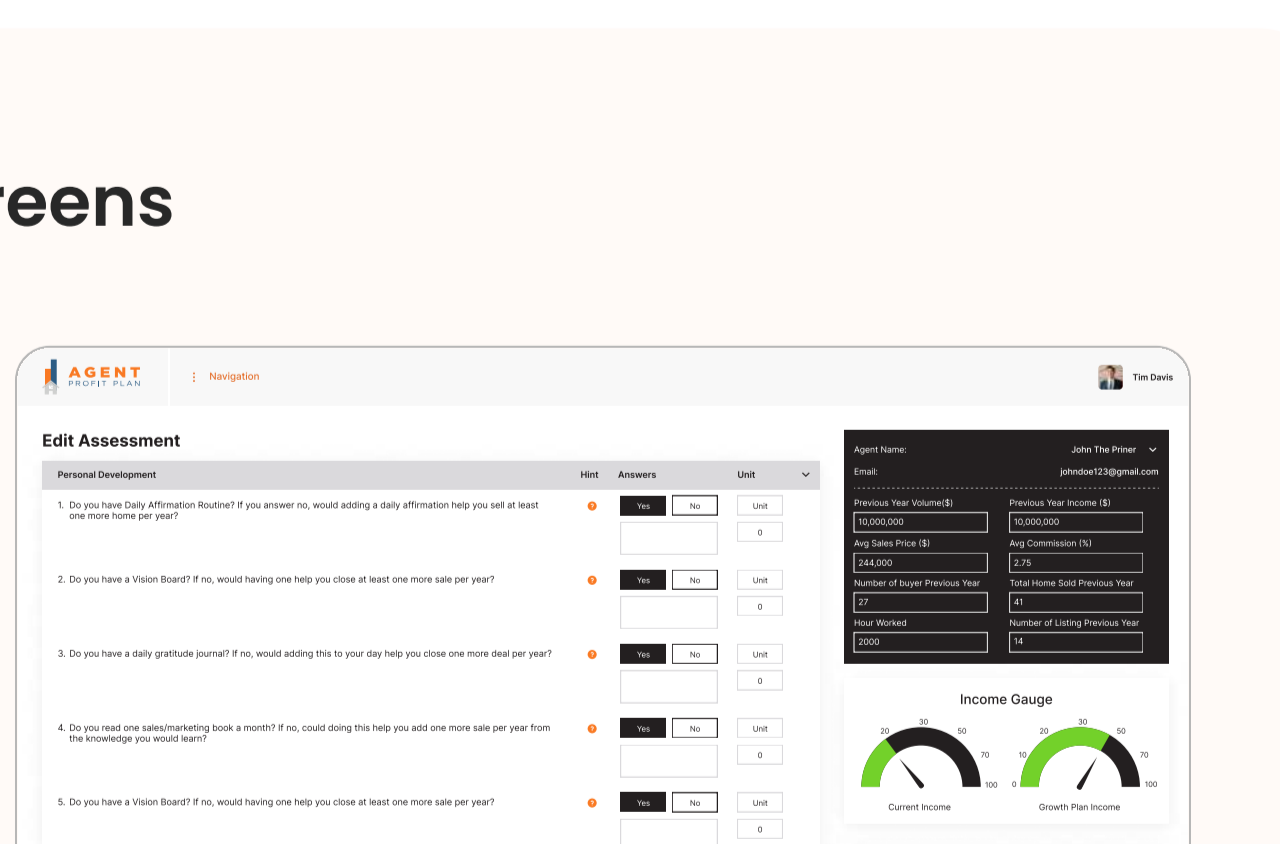


Publish Books and Magazines

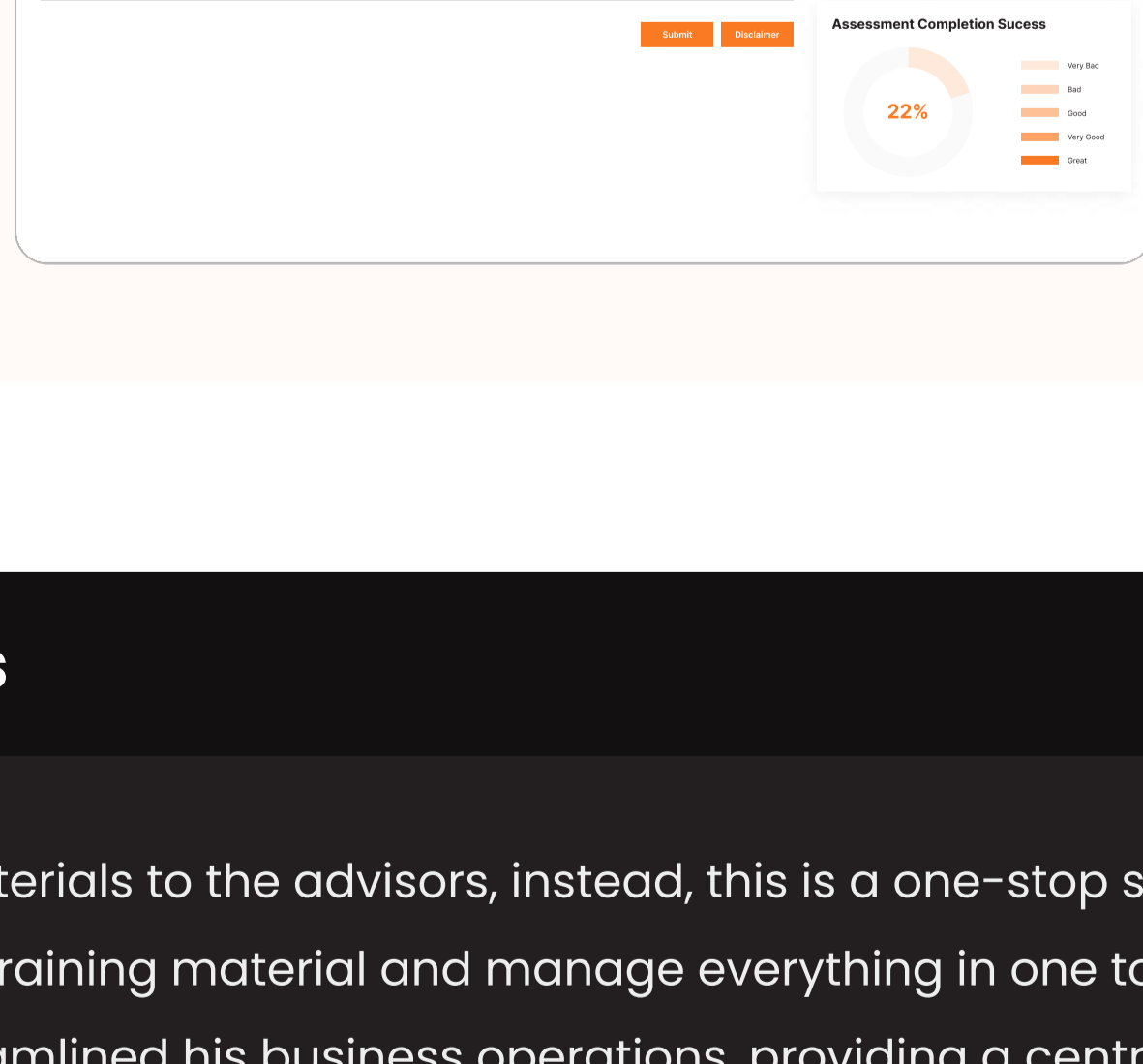
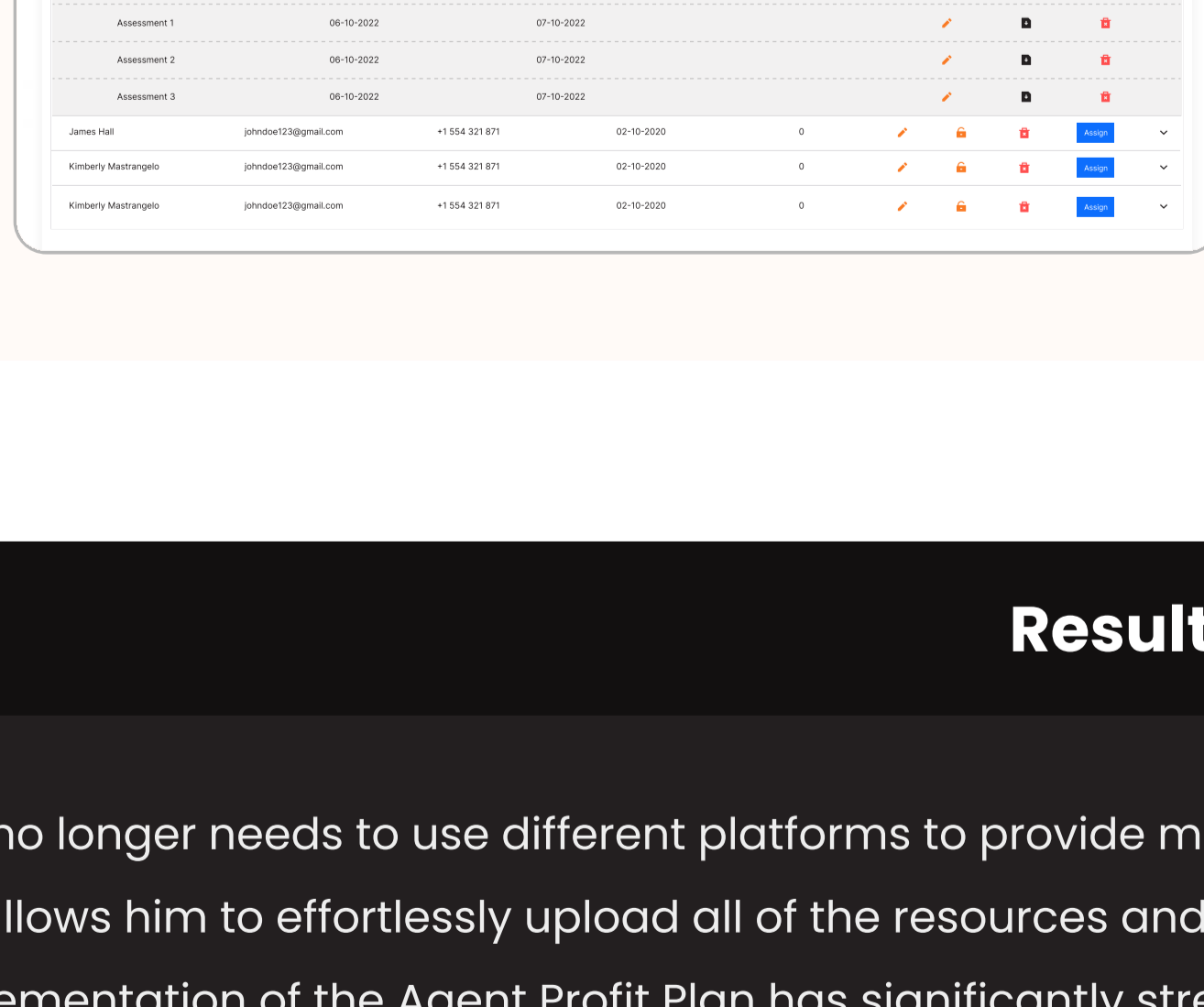
All the materials that are relevant to the client's latest books and magazines will be included in this app with the title and subtitle, along with the rest, such as images, PDFs, videos, etc., which are only accessible to the profit advisors.

Message Board

In the feature of the Agent Profit Plan application, advisors and Admin engage in open conversations on various topics within dedicated threads. This collaborative space allows all advisors, excluding the admin, to participate in and view these discussions, promoting a dynamic and inclusive exchange of ideas.



Other Screens

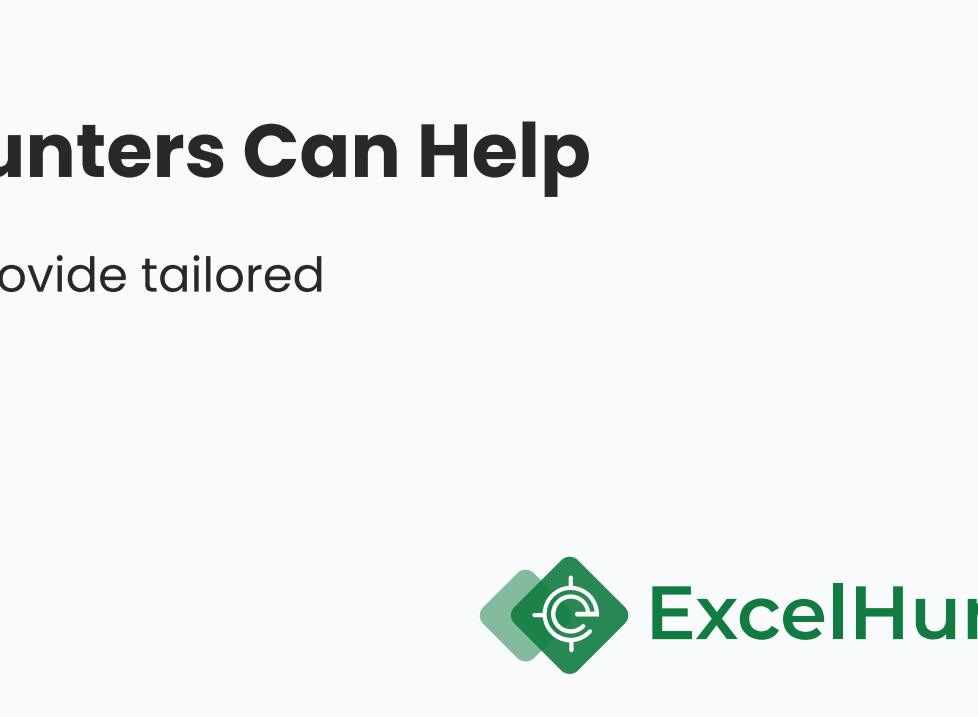


Results

Now, Tim no longer needs to use different platforms to provide materials to the advisors, instead, this is a one-stop solution that allows him to effortlessly upload all of the resources and training material and manage everything in one tool. The implementation of the Agent Profit Plan has significantly streamlined his business operations, providing a centralized platform for comprehensive data management. Also, it empowers profit advisors by offering a consolidated view of their agents' details, facilitating easy evaluation of growth rates. With this efficient system in place, our client can effortlessly oversee the entire process without direct involvement, ensuring smooth business operations and informed decision-making. It was fun to deal with this project.

Review

Working with ExcelHunters was a truly positive experience. Team did all the analysis by themselves and came up with new ideas every time. Their independent analysis and commitment to delivering unique results addressed my concerns about the project. I am thoroughly satisfied with their work and looking forward to future collaborations. Best wishes to the ExcelHunters team!



Do You Have a Similar Project to Build? ExcelHunters Can Help

If you have challenges similar to the Agent Profit Plan, ExcelHunters can provide tailored solutions to enhance your operations.

Let's connect.

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You can check our website: www.excelhunters.com