THE ART AGENCY

THE ART AGENCY · PIPELINE REVIEW

Weekly Pipeline Review

Operations Handbook §12 · Completed every Monday by Tyler Davis

Review Date: _____

Reviewed By: _____

Pipeline Stage Review

- ☐ All leads in 'New Lead' for >1 day identified and addressed
- ☐ All leads in 'Contacted' for >3 days identified and addressed
- ☐ All leads in 'Quoting' for >2 days identified and addressed
- ☐ All leads in 'Proposal Sent' for >7 days identified and addressed
- ☐ Stale leads dispositioned (re-engage or close with documented reason)

Conversion Metrics

Metric	Target	Actual	On Track?
Speed to Lead (avg. minutes)	< 5 min	_____	☐ Y ☐ N
Quoted Rate (quoted / received)	> 70%	_____	☐ Y ☐ N
Close Rate (bound / quoted)	> 40%	_____	☐ Y ☐ N
AMS360 Entry Compliance (within 24 hrs)	100%	_____	☐ Y ☐ N

By Producer

Producer	New Leads	Quoted	Bound	Lost	Notes

AMS360 Reconciliation

☐ All 'Bound/Won' policies have corresponding AMS360 entries

☐ Carrier downloads reconciled — no unmatched downloads outstanding

Action Items from This Review