

Distribution Performance

Distribution Performance

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1. Distribution Performance Overview

Purpose

This space defines how distribution performance is measured and reported: the monthly scorecard, its production procedure, and the interpretation guides used at review meetings.

Operational reporting scope

This operational reporting space supports monthly executive governance, channel performance management, and operational risk escalation across distribution operations.

Reporting objectives

- Provide a single source of truth for operational distribution KPIs
- Support timely escalation of risk and performance deterioration
- Enable cross-functional operational governance
- Improve transparency of delivery against plan

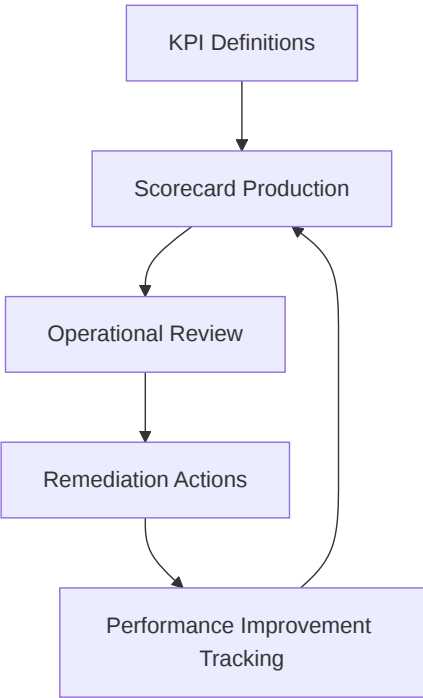
Governance cadence

- Working day 3: data cut
- Working day 4: source extraction
- Working day 6: validation and commentary chase
- Working day 8: executive review and publication

Reporting landscape

Report	Audience	Frequency
Distribution monthly scorecard	Distribution leadership, ops review	Monthly, working day 8
Panel performance matrix	Quarterly distribution committee	Quarterly
Ad-hoc channel deep-dives	As commissioned	On request

Operational performance management cycle



Where the numbers come from

KPI definitions are owned centrally in **KPIs and Performance Measures** — this space consumes those definitions and must never redefine a measure locally. If a scorecard needs a measure that does not exist, raise it through the KPI dictionary change process first.

▼ Known reporting limitations

- Some broker onboarding metrics depend on manual CRM status updates.
- Historical comparatives may vary after finance restatement periods.
- Persistency calculations exclude legacy migrated books before FY2022.
- Ad-hoc channel deep-dives are outside standard assurance scope.

Reporting support

[Submit Reporting Data Issue](#)

2. KPI packs

2.1. Distribution monthly scorecard

Scorecard contents

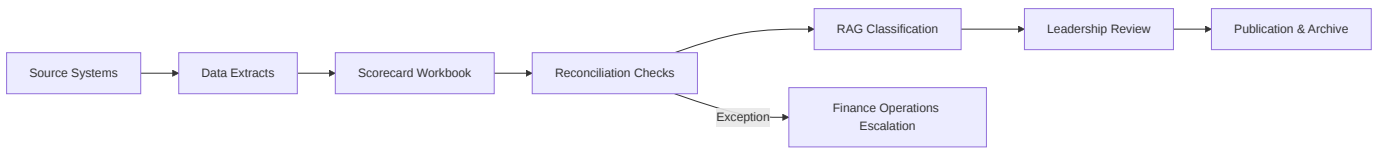
The monthly scorecard reports these measures, one page per channel plus a consolidated view. Definitions, formulas and data sources live in the **KPIs and Performance Measures** space — the scorecard states values and trends only.

[Open KPI Definitions Library](#)

Monthly reporting lifecycle

- 1 Data extraction completed from policy admin, CRM, and actuarial systems
- 2 Finance reconciliation and tolerance checks performed
- 3 RAG thresholds automatically applied and validated
- 4 Business owners submit commentary for all consecutive amber/red indicators
- 5 Distribution leadership reviews consolidated scorecard
- 6 Approved scorecard published and archived in the reporting library

Reporting process overview



Operational governance

Role	Responsibility	Escalation Trigger
Distribution Operations	Produce and validate the monthly scorecard	Data not delivered by working day 6
Finance Operations	Own financial reconciliation and tolerance disputes	GWP variance exceeds 0.5%
Channel Heads	Provide commentary and remediation actions	Amber/red KPI without owner action
COO Office	Review persistent operational risk themes	Any KPI red for 3 consecutive months

Live scorecard workbook

The live scorecard workbook (sample data):

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Example Spreadsheet

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View only

	A	B	C	D	E	F	G	H
1	Student Name	Gender	Class Level	Home State	Major	Extracurricular Activity		
2	Alexandra	Female	4. Senior	CA	English	Drama Club		
3	Andrew	Male	1. Freshman	SD	Math	Lacrosse		
4	Anna	Female	1. Freshman	NC	English	Basketball		
5	Becky	Female	2. Sophomore	SD	Art	Baseball		
6	Benjamin	Male	4. Senior	WI	English	Basketball		
7	Carl	Male	3. Junior	MD	Art	Debate		
8	Carrie	Female	3. Junior	NE	English	Track & Field		
9	Dorothy	Female	4. Senior	MD	Math	Lacrosse		
10	Dylan	Male	1. Freshman	MA	Math	Baseball		

Class Data

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Production

Measure	Target	Tolerance
Gross written premium vs plan	100%	95% amber, 90% red
New business policy count	Plan	10%
Quote-to-bind conversion	32%	28% amber

Quality

Measure	Target	Tolerance
First-pass completeness of proposals	85%	75% amber
Never-taken-up rate	< 4%	6% red
12-month persistency	88%	84% amber

Operations

Measure	Target	Tolerance
Intermediary onboarding cycle time	10 working days	15 amber
Referred-quote turnaround	4 business hours	8 amber
Control self-assessment: overdue actions	0	any = amber

RAG rules

Commentary requirements

Red or amber for two consecutive months requires a commentary block: **cause, action, owner, date**. Green measures carry no commentary — the scorecard is for exceptions, not narration.

Escalation threshold

Any KPI remaining red for three consecutive reporting periods must trigger a remediation plan review with the Distribution COO and Finance Operations. Owners must provide recovery milestones and revised target dates before the next ops review.

Data quality and control principles

- Source data must remain system-derived with no manual adjustment inside the reporting workbook.
- Reconciliation differences greater than 0.5% must be investigated before publication.
- Missing values are recorded explicitly as "no data" rather than left blank.
- Historical KPI thresholds may only be changed through the KPI governance approval process.

Executive review expectations

During monthly operational reviews, leadership focus is expected on:

- Persistent amber/red trends
- Material deviations from production plan
- Deterioration in customer or intermediary quality metrics
- Operational control themes and remediation progress
- Emerging distribution capacity constraints

2.2. Producing the monthly scorecard

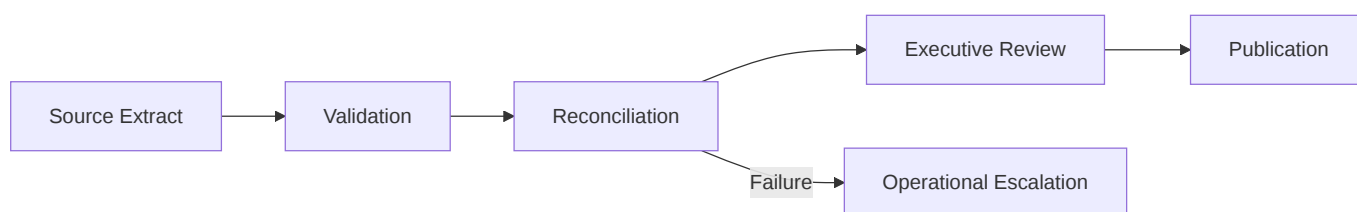
Purpose

Instruction for the analyst producing the Distribution monthly scorecard. Due at the monthly ops review on working day 8; data cut is close of business on working day 3.

Operational effectiveness

Publication deadlines are measured against the operational governance calendar. Consistent on-time delivery is reported as part of monthly operational effectiveness tracking.

Operational publishing flow



Steps

- 1 Run the extract pack on working day 4: production extract (policy admin system), pipeline and referral extracts (CRM), persistency file (actuarial shared area).
- 2 Load extracts into the scorecard workbook. Do not edit extract files by hand — if a source number is wrong, fix it at source and re-extract, or footnote it.
- 3 Refresh the workbook and check the reconciliation tab: GWP must tie to the finance flash report within 0.5%. Outside tolerance, stop and resolve with **Finance Operations** before distributing anything.
- 4 Apply RAG statuses per the thresholds in the KPI pack. The thresholds are formula-driven — never hand-colour a cell.
- 5 Chase commentary for red/amber measures from the accountable owners (per the RACI in **Roles and Responsibilities**). Commentary must state cause, action, owner, date.
- 6 Publish to the distribution leadership channel by working day 8, 12:00, and archive a copy in the scorecard library with the naming convention `SC_YYYY-MM.xlsx`.

Reporting controls and risks

Data controls

- Validate all source extracts against prior month totals
- Reconcile finance-linked metrics before publication
- Confirm no missing commentary fields for red/amber measures

Operational risks

- Delayed extract delivery from upstream systems
- Manual intervention in intermediary onboarding records
- Version control conflicts during executive review

Publishing standards

- Apply the approved naming convention
- Archive prior month outputs in the reporting library
- Ensure all executive commentary is final before release

Quality checks before publishing

- ☐ Reconciliation tab green
- ☐ No measure missing a value (gaps are recorded as "no data", never blank)
- ☐ Every red/amber has commentary
- ☐ Version and data-cut date on the cover page